

Council of University of California Retiree Associations (CUCRA)

Executive Committee

Sue Abeles (UCLA), Chair

Emily Galindo (UCD), Vice Chair

Elise Woods, (UCB) Secretary

Andy Plumley (UCR), Treasurer

Pat Price (UCI), Information Officer

Larry Hull (UCSD), Webmaster

John Meyer (UCD), Past Chair

April 25, 2026

An Update to Our Membership: April 2026

From Sue Abeles, Chair, CUCRA

1. Emeriti/Retiree Advisory Committee

In my October update, I indicated that changes at the Office of the President (i.e., the announcement of Vice President-Systemwide Human Resources Cheryl Lloyd's planned retirement and the reorganization that moved the Retirement Administration Service Center from Human Resources to Shared Services) could potentially impact the Emeriti/Retiree Advisory Committee (ERAC) structure and function. I am pleased to report that ERAC has continued to meet since the hiring of the new Vice President-Systemwide Human Resources in February. Vice President Dianna Henderson, who chairs the committee, has held two meetings since her hiring and the Interim Vice President-Shared Services and the RASC management team are participating in those meetings. You will note that the Joint Benefits Committee Report recommends that these meetings be held more frequently and that minutes be taken to record the discussion and action items. At our ERAC meeting yesterday, Dianna indicated that she was open to discussing both recommendations with the committee. Unfortunately, we ran out of time to address these but we agreed to carry them forward to the next meeting.

2. RASC Security Issues

In January, RASC announced that they had learned of recent attempts to defraud UC retirees by changing their direct deposit information in UC Retirement at Your Service (UCRAYs) and/or initiating transactions on their behalf. We will receive an update from RASC at the Spring joint meeting on their investigation into the specific facts and circumstances of the fraud and what they are doing to address the situation and reduce future risks. **It is critical that all retirees monitor their benefit payments carefully and alert the RASC immediately if fraud is suspected.** RASC published an article in UCNet that addresses this issue with recommendations regarding how retirees can protect themselves.

3. Follow Up to Fall Meeting Discussion with Chief Information Officer (CIO) and Vice President for Information Technology Van Williams and Chief Information Security (CIS) Officer Monte Ratzlaff

Joel Dimsdale, CUCEA Chair, and I reached out to CIO/Vice President Van Williams and CIS Officer Monte Ratzlaff as a follow up to the discussions at our Fall joint meeting. I am pleased to report that a panel has been formed to continue discussions with UCOP IT leadership and representatives from CUCRA and CUCEA. Regular meetings have been scheduled to continue discussions regarding information technology issues of concern to retirees and emeriti (e.g., access issues, email, user support, security issues, etc.). Professor Emeritus John Gilbert from UCSB will serve on the panel for CUCEA. Retiree Bart Kats, who was in Research Computing at UCR, will serve as CUCRA's representative. The first meeting is calendared for June.

ADMINISTRATIVE MATTERS

2028 CUCRA Retiree Survey Committee: The 2028 CUCRA Retiree Survey Committee has been formed. Patrick Cullinane has graciously agreed to chair the committee again and most of the 2024 committee members have also graciously agreed to continue their membership on the committee. I issued a formal charge to the committee in January, which is attached, and the committee has commenced meetings. Their initial focus is on items identified in their report from the last survey. Patrick will be joining our April 30th meeting to provide an update and discuss next steps.

Audit Report for 2025 Activity: With the election of a new Treasurer and departure of our former Treasurer effective January 1, 2026, I engaged David Olson to conduct a final audit of our 2025 financials, consistent with our bylaws, which require that an audit be conducted upon turnover in the Treasurer position. The audit report will be sent under separate cover with the financial reports. David will be present at our April 30 meeting to discuss the audit and his report.

Financial Reports: Former Treasurer John Dahl and our new Treasurer Andy Plumley have been collaborating to finalize the 2025 financial reports and projected grants to associations in 2026. John and Andy will be distributing the financial reports under separate cover. Please review these materials in advance as it is part of our fiduciary responsibility to ensure council members have an awareness of our organization's finances and understand how funds are allocated.

Attachment A: Email Launching 2028 CUCRA Survey Committee

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From: Susan Abeles skabeles@yahoo.com Subject:

Launching 2028 CUCRA Survey Committee

Date: Jan 30, 2026 at 9:25:31 AM

To: Christy Dawley [REDACTED], Marianne Schnaubelt

[REDACTED], Narriman Shahrokh

[REDACTED], Elise Woods [REDACTED]

Cristina L. Otegui [REDACTED], Judith Tuch

[REDACTED], Robert Daly [REDACTED], Anne

Pautler [REDACTED]

Cc: Patrick C. Cullinane [REDACTED], Emily Galindo

[REDACTED]

TO: MEMBERS OF THE 2028 CUCRA SURVEY COMMITTEE

Thank you for agreeing to serve on the 2028 CUCRA Survey Committee. Your experience with the 2024 survey process and your enthusiasm for this project will be invaluable in ensuring another exceptional product. As you know, the purpose of this periodic survey is to demonstrate the value that retirees contribute to the University of California and to their respective communities in terms of time, talent, and treasure. The past survey reports have been shared broadly with University of California leadership at the Office of the President and at the locations with the Chancellors and their respective teams. We have received a lot of visibility and positive recognition as a result of our efforts to document how retirees contribute beyond their years of service at UC and many favorable comments by leadership indicating they are impressed by the commitment and contributions retirees continue to demonstrate. Additionally, the survey provides local retiree associations and Retiree Centers with information about their population of retirees, their interests and activities, which can be used to plan programmatic offerings.

The 2028 CUCRA Survey Committee is charged to implement, where feasible, your recommendations from the 2024 survey to improve the quality of the survey and resulting report, after careful analysis of the cost/benefits of those recommendations, and in consultation with the CUCRA Executive Committee. Any proposed financial impacts will need to be reviewed and approved by the CUCRA Executive Committee prior to implementation. Among the goals of the 2028 effort are the following: 1) to improve the relevance and quality of the survey questions; 2) to increase the response rate; 3) to ensure accurate and complete data regarding the financial contributions of retirees to the University locations; and 4) to produce a final report for dissemination no later than Fall, 2029.

I deeply appreciate Patrick's willingness to chair this initiative again and your willingness to join him as committee members.

I look forward to hearing from you as work progresses on this next survey iteration.

Best,

Sue Abeles, CUCRA Chair