



# UC RETIREES ADVOCATES AMBASSADORS ASSETS

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University of California  
Retiree Activities

July 2013 through September 2016

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COUNCIL OF  
UC RETIREE ASSOCIATIONS





# UNIVERSITY OF CALIFORNIA RETIREE SURVEY HIGHLIGHTS

JULY 2013 THROUGH SEPTEMBER 2016

RESPONDENTS



# 4,478

University of California retirees completed the survey

## UC & COMMUNITY SERVICE



### 63%

2,772 volunteered in their communities

### 20%

849 volunteered for UC

### 14%

619 volunteered both for UC and in their community

## PROFESSIONAL ENGAGEMENT



### 27%

1,154 provided one or more professional services

### 15%

653 published one or more written works

## AWARDS & RECOGNITION



### 13%

573 received one or more awards or recognition

## EMPLOYMENT

### 12%

514 returned to work at UC

### 16%

728 worked outside of UC

### 15%

648 were self-employed



# Overview

This report presents the activities and accomplishments of respondents to the first comprehensive survey of University of California retirees. The survey, conducted in fall 2016 and covering the three-year period from July 2013 through September 2016, asked retired staff and non-Senate academics\* about their volunteer service, professional engagement, employment in retirement and awards/recognition.

Staff and non-Senate academics are UC's office staff, administrators, scientists, professionals, technicians, and other employees in all fields of endeavor. Whether they are working in academic departments, student service units, laboratories or outlying locations, these employees perform essential services as the support team that enables the University to excel in its fundamental missions of teaching, research and public service.

As retirees, many of these former UC employees continue their productive and engaged lifestyles. As one retiree stated, they are "retired from working but not retired from living." The most striking survey findings are the extent to which respondents remained committed to UC's mission of public service, continuing their contributions to society for many years after their retirement. A total of 2,772 (63%) respondents volunteered in their communities, 849 (20%) volunteered for UC, 1,154 (27%) provided professional services and 653 (15%) published written works.

The majority of UC retirees have devoted 20, 30 or 40+ years to the University and many feel a lifelong sense of loyalty to the institution. For them, retirement is not a disengagement from UC, but rather a shift in the relationship. These findings suggest that the University, through partnership with its retiree associations and retirement centers, might more effectively facilitate retirees' roles as advocates, ambassadors and assets in support of the University's missions.

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\* Non-Senate academic positions include lecturers, librarians, researchers, cooperative extension specialists and other academic appointees; although these employees are not members of the Academic Senate, their responsibilities often include teaching and/or research.

# The Survey

An online questionnaire, created using SurveyMonkey software, was distributed primarily via email to 16,854 University of California retirees who had previously provided their email addresses to their retiree association or retirement center. The 4,478 respondents were from the 10 UC campuses (five with medical schools), three UC-managed or co-managed Department of Energy research laboratories and the UC Office of the President. Respondents included a wide range of retired staff as well as a smaller cohort of non-Senate academic retirees (11% of respondents). Emeriti were not included in this survey, as they are surveyed separately every three years.

*Respondents included retirees from the 10 UC campuses (five with medical schools), three UC-managed or co-managed Department of Energy research laboratories and the UC Office of the President.*

**Because the survey was neither of the entire retiree population nor of a randomly selected sample, the results cannot be generalized to all UC retirees.** In addition, because a slight majority (58%) of survey respondents were retiree association members, the results may disproportionately reflect their participation in retiree association-sponsored endeavors. Whenever this report mentions “retirees,” it is referring only to those retirees who responded to this survey.

More information regarding respondent demographics, response rates and the project’s methods can be found at the end of this report.

## UC RETIREE ORGANIZATIONS

### CUCRA

The Council of University of California Retiree Associations (CUCRA), the sponsoring organization for this survey, is a UC systemwide consortium comprising representatives from 13 UC retiree associations.

CUCRA, founded in 1993, advocates for UC retirees, represents the interests of the individual UC retiree associations, promotes mutually beneficial relationships between the University and its retirees and supports the teaching, research and public service missions of the University of California.

CUCRA collaborates with the Council of University of California Emeriti Associations (CUCEA), a parallel organization that represents UC emeriti associations at the nine UC campuses that also have retiree associations. CUCRA, CUCEA and each retiree and emeriti association are officially recognized by the University as affiliated organizations.

### UC Retiree Associations

The 13 UC retiree associations that comprise CUCRA are all-volunteer organizations, similar to some alumni associations, which advocate on behalf of the retirees at their locations, provide programs and services for their members and support the missions of the University and their institutions.

### UC Retirement Centers

Seven of the 10 UC campuses (Berkeley, Davis, Irvine, Los Angeles, San Diego, Santa Barbara, and Santa Cruz) have established retirement centers, which are campus-funded departments that enhance connections for retirees to their campuses and provide business and support services for their retiree and emeriti associations.

*Contact information and website addresses for these organizations can be found on page 15.*

# Volunteer Service

Across a diverse range of staff levels, ages and locations, the respondents to this survey showed a strong commitment to serving society for the greater good. As mentioned in the overview, 2,772 (63%) volunteered in their communities and 849 (20%) volunteered for UC.

## Community Volunteer Service

As active volunteers in their communities and, in some cases, around the globe, UC retirees continue to carry out the public service mission of the University with enthusiasm. The 63% volunteer rate reported in this survey is substantially higher than the average rate for U.S. adults aged 55 and older. In a 2015 study on volunteerism by the U.S. Bureau of Labor Statistics<sup>1</sup>, only 25 percent of adults age 55 to 64 and 24 percent of adults age 65 and over reported serving as volunteers in any capacity.

As might be expected from University retirees, a high percentage of respondents served in leadership roles such as officers or directors on the boards of non-profit agencies. Others volunteered in support roles, providing hands-on services to those in need. While there was repetition in the listed endeavors, there were also several unique projects, including the

retiree who helped former Navy SEALs transition back to civilian life and another who coached a team of high school students for a worldwide robotics competition.

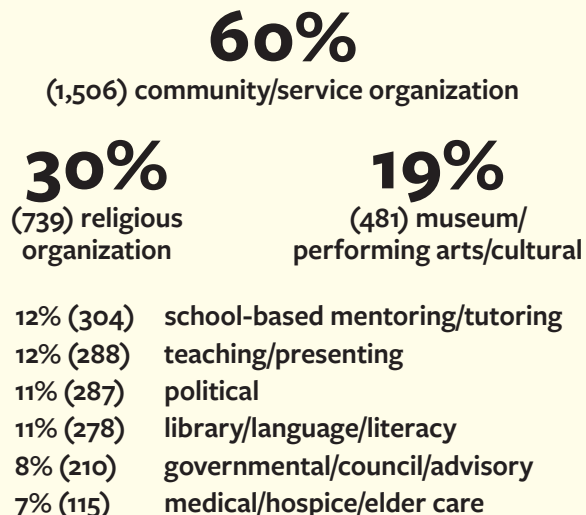
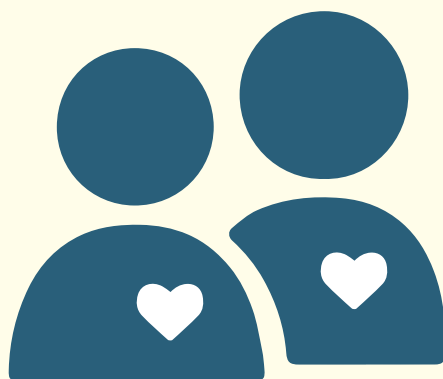
Retirees reported an impressive depth and breadth of activities for many different types of organizations. As shown below, community/service organizations were by far the most common choice (60%), followed by religious organizations (30%). The majority of reported volunteer activities fall into three broad categories: service to people, animals or the environment.

Individuals volunteered for a variety of organizations that benefit underserved populations, including low-income seniors or families, foster children, veterans, people with disabilities and others. They served at medical facilities, senior centers, homeless shelters, food banks, crisis centers, low-income housing complexes and more. They provided *pro bono* services such as tax assistance, financial help, support group facilitation, legal aid and home building/renovation assistance. One retiree mentored a refugee family from the Congo, another raised funds for indigenous communities and a third assisted with delivering medical supplies to countries in need.

*“I love my life, and my UCSC affiliation—both work and otherwise—has helped me be a force for good in the community.”*

UC RETIREE

## TYPES OF COMMUNITY VOLUNTEER SERVICE



Because respondents could select more than one choice, percentages total more than 100%.

## Volunteer Service *Continued*

Respondents supported many types of animal welfare efforts, including wildlife rehabilitation or monitoring, animal research, domestic animal rescue/adoption and animal rights. They reported volunteering at zoos, clinics, aquariums, shelters and more. One retiree worked on an international bird rescue project.

Retirees also gave their time to environmental efforts. They worked in public gardens or conservatories, parks, wilderness areas, urban farms, land conservancies, historic sites and others. They provided many different types of services including acting as docents, maintaining trails and restoring vegetation. One retiree volunteered with a group to restore the natural habitat of the Channel Islands off the coast of California.

This survey also illustrates that the call to service, for the majority of respondents, remained strong for as many as 20 or more years after they retired. The community service volunteer rate hovered between 60% and 65% for all age groups, except for those older than 84, when it declined to 50%. Even

though the oldest cohort was smaller, it is notable that one-half of them were still actively serving others. One 84+ year-old created two foundations and a computer education program, and another volunteered for four different organizations: Meals on Wheels, Service to the Blind, the Elks Club and the Ladies' Auxiliary Fire Department.

### Volunteer Service at UC

Most survey respondents spent the majority or all of their careers at UC, with 71% reporting that they worked for 20 or more years and 36% reporting 30+ years of service. For many, their transition to retirement did not signal a break from UC but rather a shift in the relationship. A total of 849 (20%) respondents volunteered at a UC location during the survey period. The two most common activities, as shown below, were involvement with their retiree association or retirement center (33%) and participation in a committee or task force (also 33%).

*“I give back to my community far more often now that I have time, and I share my knowledge of UC Davis with potential students, their parents and community members...”*

UC RETIREE

### TYPES OF UC VOLUNTEER SERVICE



**33%**  
(234) retiree center or association

**33%**  
(232) committee or task force

**18%**  
(124) research

- 15% (105) staff/faculty mentoring
- 15% (104) student mentoring/tutoring
- 14% (96) health care facility
- 12% (81) event ushering
- 10% (69) teaching
- 8% (54) student advising
- 6% (40) docent

Because respondents could select more than one choice, percentages total more than 100%.





## Retiree Associations and Retirement Centers

UC retiree associations (and retirement centers, for those campuses that have centers) play a vital role in connecting retirees with the University. The majority of survey respondents, 2,562 (58%), were members of a retiree association, and nearly one-third of respondents who volunteered for UC served via their retiree association or retirement center. The associations and centers, in turn, often collaborate with other UC entities such as volunteer centers, alumni relations offices, performing arts venues, athletic departments, medical centers and arboretums/botanical gardens to connect retirees with service opportunities. While not a comprehensive list, the following are a few examples of these service initiatives:

- Fundraising for, and/or sponsoring, scholarships for students or staff (many UC retiree associations)

- Staffing of open houses, history days, commencements, special events (many UC retiree associations)
- Participating in volunteer days at UC or in the community (several UC retiree associations)
- Mentoring first-generation students (San Diego and Berkeley retiree associations)

The survey data show that retiree association members in general tend to be very involved leaders. As shown below, association members who lived within 30 miles of a UC location volunteered at more than twice the rate of non-members who lived within the same radius (28% compared to 12%). Interestingly, association members also volunteered outside of UC at a somewhat higher rate than non-members (67% compared to 55%).



## Volunteer Service *Continued*

### UC Committees or Task Forces

Retirees provide a valuable perspective to a variety of UC committees and task forces, sharing their experiential knowledge and institutional memory. Retiree associations at many UC locations collaborate with other UC departments as well as community organizations to promote service opportunities to retirees. Respondents volunteered for groups such as fundraising committees, advisory councils, scholarship selection committees, special project task forces, boards of directors and UC-affiliated support groups.

### Other UC Volunteer Service

In addition to committee work, retirees reported serving at their locations in many other capacities. Respondents raised funds for scholarships, led tours or maintained grounds at arboretums/botanical gardens, assisted

at events such as commencements and open houses, hosted international students, acted as docents at museums and assisted with performances or athletic competitions. Some unique activities included moderating/judging scientific or research competitions, making quilts for medical center patients and evaluating archival materials for libraries. Through these and other activities with students, staff, faculty and the public, retirees offer opportunities for intergenerational and interdisciplinary interactions.

### Eliminating Barriers to UC Volunteer Service

While a good number of respondents reported volunteering for UC, the level of volunteer service outside of UC (63%) was markedly higher than the level of service at UC (20%). The disparate rates suggest that most UC locations can do more to capitalize on the service capacity of their retirees and that UC





## Volunteer Service *Continued*

retiree associations and retirement centers can be important partners in facilitating an increase in retiree volunteer rates.

The survey did not ask why respondents chose not to volunteer for UC, but in the open-ended comments, retirees mentioned some factors that prevented them from doing so:

- They experienced difficulty parking (at the UC locations that offer free/reduced retiree parking, respondents noted that this was a major factor in their decision to volunteer).
- They did not know what opportunities were available, suggesting that additional publicity might increase volunteer rates.
- They lived too far away—some wondered if they could complete volunteer tasks remotely.

- Among Lawrence Livermore National Laboratory (LLNL) retirees, several mentioned that they could no longer obtain retiree badges to enter the lab. One LLNL respondent in particular lamented that it was unfortunate that employees could no longer receive the type of informal mentoring from recent retirees that he had found to be very valuable during his career.

These barriers and others like them can make it difficult for retirees to stay involved. Everyone ages, and longer and healthier lifespans open up opportunities for retirees to continue serving UC. By advancing inclusive practices, UC might realize greater benefits from this vital workforce.

*“I have enjoyed each year working with high school seniors from underserved populations in crafting their college application essays. The kids are terrific and I get way more out of it than I think I give.”*

UC RETIREE

## FINANCIAL CONTRIBUTIONS TO UC

UC retirees are strong financial supporters of the University. This survey did not ask about monetary contributions, and most of the UC locations do not track donations by retired staff—although most do so for emeriti. There are, however, some data available from four UC campuses for the three-year survey period. UC Davis reported that retired staff donated more than \$6 million (excluding non-Senate academics, as UC Davis counts that group’s donations with emeriti donations). UC San Francisco only has data for those on its retiree association mailing list—they donated more than \$600,000. UC Irvine has data on about one-third of its retired staff—that group donated more than \$11 million. UC Santa Cruz retirees donated \$1.8 million in outright gifts and another \$11.5 million in credited gifts.

Shaun Keister, UC Davis Vice Chancellor for Development and Alumni Relations, recognized retirees’ important contributions when he said, “Retirees play a tremendous role in the work that we do to raise private support. Not only do they generously support the University through their individual philanthropic contributions, but they also serve as some of our best advocates, helping us reach alumni and friends across the globe by spreading the news of all of the tremendous work and achievements happening at UC.”



# Professional Engagement

While a clear majority of survey respondents placed a high priority on volunteer service, they also contributed to their communities in other ways. A significant percentage shared their expertise through the provision of professional services or by writing and publishing.

A total of 1,154 (27%) respondents provided professional services of some type, and 653 (15%) authored, or contributed to, professional publications. Non-Senate academic retirees (including researchers, lecturers, librarians, cooperative extension specialists and others) provided professional services at a higher rate than non-academic retirees (42% compared to 25%). The academic group contributed to publications at a higher rate as well (33% compared to 13%). It is not surprising that this group reported higher rates of professional engagement because, for the majority of these academics, their pursuits were a continuation of their career interests and activities.

## Professional Services

Among the 27% of respondents who provided professional services, the types reported most frequently were consultants (47%), service on boards of directors (37%), publication editor/reviewer (20%) and service on a professional committee (18%).

Retirees shared their expertise in a multitude of fields, including education, health care, visual and performing arts, engineering, government, life and physical sciences, management, the environment, business, genealogy, religion, technology, social services, finance and more.

Several respondents served on multiple boards, committees and/or task forces, causing one to wonder whether they were busier in

retirement than when they were full-time employees. Retirees reported several unique services, including acting as the psychologist for a domestic violence center, serving as the president of the Jane Austen Society of North America, working as an attorney for the National Center for Youth Law, tutoring medical students who were learning to read EKGs and founding a non-profit that serves foster youth.

## Publications

Authors write because they want to share information, feelings or advice to benefit others. A good portion of respondents used writing as their wisdom-sharing medium, either for profit or for pleasure. Within this group, journal articles were the most common type of publication (64%), followed by papers for conferences (35%), books (26%) and book chapters (20%).

In addition, retirees contributed a variety of fictional and non-fictional writings to newspapers, blogs/websites, newsletters, magazines and other periodicals. Topics for professional publications ranged widely and included music, arts, science, genealogy, history, botany, religion, technology, retirement issues, education and more.

Writing related to retirees' personal interests encompassed many topics as well, including arts and crafts, memoirs and autobiographies, religion, hobbies and oral histories. Unique publications included a tourist-oriented blog for Vietnam, a beekeeping periodical and a newsletter for the Egyptian Ministry of Antiquities. One retiree, in a lighthearted comment, asked if Pinterest, Snapchat, Facebook, Twitter and long emails counted as writing.

*“I participate in ghostwriting and publishing memoirs for low-income people who could otherwise not afford to tell their stories.”*

UC RETIREE



# Employment in Retirement

A relatively small number of UC retirees return to some form of paid work for a variety of reasons. While some experience an unanticipated financial need, for many the reasons are intrinsic—they desire to stay more professionally connected to the world or they enjoy challenging their minds. Although this survey did not ask why retirees chose to continue working for compensation, a 2013 study by Merrill Lynch and Age Wave<sup>3</sup>, found that retirees missed the social connections, mental stimulation and sense of purpose after they retired from full-time employment.

## Employment at UC

Overall, 514 (12%) respondents returned to a paid position at UC during the survey period. Virtually all of them worked in part-time, limited-term positions. UC retirees who are drawing a pension are limited to working no more than 43% time during any 12-month period and appointments may not normally exceed 12 months. Within those limitations, however, hiring an already-trained and knowledgeable retiree can result in significant savings in terms of both cost and time for the hiring department. Survey respondents cited many different short-term assignments that are particularly well suited to retirees, including the following:

- Training new staff
- Filling a position on an interim basis during transitions
- Reading and evaluating admissions applications
- Assisting during seasonally busy times, such as the first week of each term
- Writing grant applications
- Helping with short-term research or special projects
- Covering for vacations, medical leaves or other leaves of absence

## Employment Outside of UC

A slightly larger number, 728 (17%) respondents reported working in a paid position at a business or organization outside of UC. In addition, 648 (15%) respondents reported being self-employed. The vast majority of those who were employed or self-employed worked on a part-time basis. The most frequently mentioned work activities were managing, consulting, providing financial services, teaching, mentoring, writing and researching. Some unique work endeavors included running rivers as a kayak instructor, filling in as a relief pharmacist, designing greeting cards and acting in commercials and films. One retiree founded a spiritual/wellness center and another became a personal fitness trainer.

*“I continued to consult with UCI’s School of Education as an accreditation specialist and student advisor. I also scored Teaching Performance Assessments for a variety of teacher education programs and served as a university supervisor for student teachers.”*

UC RETIREE

# Awards and Recognition

UC retirees make extraordinary contributions in service to others, and many have received recognition for their work. Responses from 573 (13%) survey respondents reported such accolades. The majority of organizations sponsoring the awards/recognition were community-based groups (64%), followed by UC-affiliated organizations (28%) and government agencies (18%). The most commonly mentioned organization

types were professional, performing arts, visual arts, civic, community service, education and religious organizations.

Respondents received awards for outstanding service, lifetime achievement, excellence, longevity of service and more. Unique awards included a Chancellor’s Award for Public Service, a Superior Court commendation, induction into a university athletic hall of fame and a Red Cross *Rookie of the Year* award.

# Life Beyond Service

**A**fter a lifetime of work, multi-tasking and meeting other people's schedules, retirees appreciate their freedom and leisure time. Although this survey suggests respondents' commitment to serving others, they also took time to enjoy life's pleasures. They showed a high level of interest in lifelong learning, travel and creative endeavors. Additionally, they participated in many different recreational activities, including time spent with family and friends, gardening, hobbies and fitness. A significant percentage reported providing care for loved ones, which in some cases was for pleasure, but in most cases was an unanticipated necessity.

## Lifelong Learning

A clear majority of respondents showed an interest in lifelong learning opportunities, with 62% expressing a desire to attend educational workshops sponsored by their retiree association or their retirement center. To meet this interest, UC retiree associations and/or retirement centers plan educational programs for retirees and many partner with other UC and community groups to include retirees in other educational offerings. Additionally, many respondents reported participating in continued intellectual pursuits, including auditing university classes, attending conferences or learning new languages. Two respondents returned to college after they retired—one earned a Ph.D. and the other was attending medical school.

## Travel

This survey did not ask a direct question about travel, but it was the most commonly mentioned recreational interest in the open-ended comments. Respondents took local and regional forays, RV trips across the country and "bucket list" grand tours. Unusual adventures included biking from Berlin to Dresden, sailing on a six-year around-the-world trip, trekking across Nepal and chasing

lightning in the Grand Canyon. One retiree reported taking motorcycle trips to Mexico, Baja and 15 different states during his first 18 months of retirement. CUCRA and several of the UC retiree associations offer group travel and day trips for their members, sometimes in partnership with UC alumni associations or other travel organizations, and these are very popular activities.

## Creative Pursuits

A majority of respondents nurtured their creative interests, with 2,444 (57%) reporting participation in artistic activities, including crafts of many different types (such as pottery, sewing, jewelry, quilting, knitting and woodworking), writing and the arts. Some unique creative activities included judging photography exhibits, performing in historical re-enactments, learning Chinese calligraphy and making quilts for wounded military returning to U.S. One retiree took up the clarinet after a 50-year hiatus, and another received an honorarium to build an installation at the Burning Man festival.

## Caregiving

A significant number of respondents, 1,702 (39%), provided care for others—most frequently a parent, child/grandchild or spouse/partner. Some said that their caregiving was welcomed and positive. In the words of one respondent, "I was the primary caretaker for my grandson from age four months to 12 months. It was precious time—full of love."

The vast majority of caregivers, however, reported struggling with the overwhelming financial, emotional and physical demands. As one respondent said, "Attempting to navigate the myriad bureaucracies to secure good (or even adequate) care is killing the caregiver faster than the folks needing care." Several of the UC retirement centers have begun offering services such as support groups, workshops and resource referrals, which caregiving retirees have welcomed with gratitude.

*"I immensely enjoyed my job, but a few years ago a slight reduction in my work week allowed me to take art classes – and set me on a new course. I am grateful that my service at UC has allowed me to have a productive 'afterlife.'"*

UC RETIREE



## Life Beyond Service *Continued*

### Physical Activity

While this survey also did not inquire about physical activity, many respondents extolled the benefits of staying fit. Their emphasis on health is not surprising, given a 2014 study by Merrill Lynch and Age Wave<sup>3</sup> in which respondents specified that good health trumps all other factors for a happy and satisfying retirement. Physically active people retain more mobility and enjoy longer life spans and, more importantly, “health spans.”

To encourage retirees to maintain an active lifestyle, several of the UC retirement

centers offer retiree fitness programs, often in partnership with campus recreation departments.

Survey respondents listed the usual active pursuits such as hiking, biking, water exercise, dancing, yoga, tai chi, golf and a variety of others. Several retirees mentioned that they had taken up pickleball, which is currently the fastest growing sport in the U.S. One retiree became an avid skydiver and another learned to swim after retirement—self-described as “a work in progress.”

*“I consider my activities to be an investment as important as the stock market. If I keep moving I will be healthier, happier and more free of health expenses.”*

UC RETIREE

## Reimagining Retirement

This survey suggests that UC retirees are very active and valuable resources and that there is considerable potential for the University to utilize the UC retiree organizations and retirement centers to make greater

use of retirees’ time and talents. UC retirees are reimagining and redefining their lives to make a difference, and many do so while acting as ambassadors, advocates and assets for the University of California.



# Survey Participation

Location	# of Respondents from location	% of Total Survey Respondents	# of Annuitants* as of 6/30/2016	Responses / Population
UC Berkeley	694	15%	6,601	10.5%
UC Davis	897	20%	8,641	10.4%
UC Irvine	355	8%	4,031	8.8%
UC Los Angeles	622	14%	9,398	6.6%
UC Merced	1	< 1%	74	1.4%
UC Riverside	49	1%	1,752	2.8%
UC San Diego	300	7%	6,394	4.7%
UC San Francisco	272	6%	6,702	4.1%
UC Santa Barbara	315	7%	2,155	14.6%
UC Santa Cruz	168	4%	1,858	9.0%
Office of the President	177	4%	779	22.7%
Lawrence Berkeley Lab	247	6%	1,770	14.0%
Lawrence Livermore Lab	340	8%	5,061	6.7%
Los Alamos Lab	7	< 1%	4,608	0.2%
Other	34	< 1%		
<b>Total</b>	<b>4,478</b>		<b>59,824</b>	

\* While there were approximately 75,000 living UC retirees (excluding emeriti) at the time of the survey, about 22% of that total had opted to take a lump sum at retirement rather than a monthly pension, and thus are not annuitants. Retirees who take a lump sum are not tracked by the UC Office of the President after retirement and so are not reflected in the total number of annuitants for each location.





# Survey Methodology

The Council of University of California Retiree Associations (CUCRA) undertook this survey to learn about the contributions made by retired UC staff and non-Senate academics. The survey planning committee developed an online survey instrument using SurveyMonkey (<http://surveymonkey.com>).

As of the date of this survey, the University of California had approximately 75,000 living retirees, but the entire population was not surveyed because of budgetary limitations and the University's policy of not releasing an individual's email address without his/her explicit consent. The survey questionnaire was distributed primarily by email to the 16,854 retirees who had provided their email addresses to their local retiree associations or retirement centers. This survey methodology does not permit generalizing results to the University of California retiree population as a whole.

A total of 4,478 of those contacted completed the survey, a 27% response rate. Respondents included retirees from the 10 UC campuses, three UC-managed or co-managed Department of Energy research laboratories and the UC Office of the President.

Each association and/or center distributed the invitation to participate in the online survey via email to their location's retirees in late September 2016, followed by several reminders in the ensuing weeks. Many associations also posted information on their websites and included announcements in their newsletters. At least one location sent surveys via U.S. mail to retirees who had not provided email addresses. The survey closed in mid-November. CUCRA offered 10 gift cards of \$100 each as an incentive and selected winners via a random drawing.

Standard rules for coding responses were used for all data analyses. Additional information regarding the survey methodology, as well as the complete survey instrument, are available at <http://cucra.ucsd.edu>.

In addition to asking questions about retirees' volunteer service, professional engagement, employment in retirement and awards/recognition, the survey also collected data about respondents' involvement in their local retiree association. This information was shared with the associations but is not included in this report.

\*Emeriti were not included in this survey because the Council of UC Emeriti Associations conducts a similar survey of emeriti every three years. The report of the most recent emeriti survey, *A Virtual Eleventh Campus: an Inventory of University of California Emeriti Activity During 2012 – 2015*, is available at <http://cucea.ucsd.edu>.

## The Survey Committee

The CUCRA Survey Committee included six UC retirees and two UC retirement center directors:

- Lynn Bailiff, Retiree, President, UC Retirees' Association at Berkeley\*
- Sue Barnes, Director, UCLA Emeriti/Retirees Relations Center\*\*
- Lee Duffus, Retiree, UC Santa Cruz; Chair, CUCRA (2013 – 2016)
- Marguerite Jackson, Retiree, UC San Diego; former secretary, CUCRA\*

- Joe A. Lewis, Retiree, UC Office of the President and the Regents; Vice-Chair, CUCRA (2017 – 2019)
- Sandra Norberg, Retiree, President, UC San Francisco Retirees Association
- Marianne Schnaubelt, Retiree, UC Irvine; Chair, CUCRA (2017 - 2019)
- Cary Sweeney, Director, UC Berkeley Retirement Center

\*Member of the Data Analysis Team

\*\*Report author and publication coordinator

# Acknowledgments

This project truly was a collaborative group effort. Recognition and appreciation should begin with the leadership of CUCRA, which realized the importance of gathering data about the activities and accomplishments of UC retirees. The entire survey committee is to be commended for their dedication and cooperative spirit throughout the development of the survey questionnaire, analysis of the data, suggestions for the content and careful editing of this report.

In addition to the committee, others contributed to the project. Jeri Frederick, director of the UC Irvine Center for Emeriti & Retirees, provided additional editing services.

UC Davis Professor Emeritus John Vohs, author of *A Virtual Eleventh Campus: An Inventory of University of California Emeriti Activity During 2012 – 2015*, published in 2016, served as a technical advisor, providing valuable advice and guidance. Marjorie Ahl and Becky Heard from the UC Davis Retiree Center assisted with identifying photos. Lastly, CUCRA representatives, retiree association volunteers and retirement center staff at each location were invaluable in managing distribution of the questionnaire and sending reminder messages to retirees.

*Sue Barnes*

UCLA Emeriti/Retirees Relations Center

Report design by Alexander Atkins Design, Inc., <http://alexatkinsdesign.com>

# End Notes

- 1 U.S. Bureau of Labor Statistics survey, “Volunteering in the United States, 2015,” <https://www.bls.gov/news.release/volun.nro.htm>
- 2 Merrill Lynch and Age Wave survey, “American’s Perspectives on New Retirement Realities and the Longevity Bonus” <https://mlaem.fs.ml.com/content/dam/ML/Articles/pdf/AR111544.pdf>
- 3 Merrill Lynch and Age Wave survey, “Health and Retirement: Planning for the Great Unknown,” [http://agewave.com/wp-content/uploads/2016/07/2014-ML-AW-Health-and-Retirement\\_Planning-for-the-Great-Unknown.pdf](http://agewave.com/wp-content/uploads/2016/07/2014-ML-AW-Health-and-Retirement_Planning-for-the-Great-Unknown.pdf)



# Websites and Contact Information

## CUCRA

Website: <http://cucra.ucsd.edu>

Email: CUCRAemail@aol.com

## UC Retiree Associations

### UC Retirees' Association at Berkeley

Website: <http://retirement.berkeley.edu/ucrab>

Email: ucbrc@berkeley.edu

### UC Davis Retirees' Association

Website: <http://ucdra.ucdavis.edu/>

Email: retireecenter@ucdavis.edu

### UC Irvine Retirees Association

Website: <http://retirees.uci.edu/retirees-association/>

Email: retirees@uci.edu

### UCLA Retirees' Association

Website: <http://www.retirees.ucla.edu/>

Email: emeriti@errc.ucla.edu

### UC Riverside Retirees Association

Website: <http://retirees.ucr.edu/retirees.html>

### UC San Diego Retirement Association

Website: <http://blink.ucsd.edu/HR/benefits/financial/retire/association.html>

Email: RetireeLink@ucsd.edu

### UCSF Retirees Association

Website: <http://UCSFAlumni.org/UCSFRA>

Email: UCSFRetireesAssociation@ucsf.edu

### UC Santa Barbara Retirees Association

Website: <http://hr.ucsb.edu/retirees/retiree-association>

Email: debra.martin@hr.ucsb.edu

### UC Santa Cruz Retirees Association

Website: <https://retirees.ucsc.edu/>

Email: ucscsilverslug@gmail.com

### President's and Regents' Retiree Association

Website: <http://retirement.berkeley.edu/parra>

Email: parra4uc@gmail.com

### Lawrence Berkeley National Laboratory Retiree Assn.

Website: <http://retirement.berkeley.edu/ex-ls>

Email: EX-Ls@berkeley.edu

### Lawrence Livermore Lab Retiree Association

Website: <http://www.livermorelabretirees.org>

Email: chair@livermorelabretirees.org

### Los Alamos Laboratory Retiree Group

Website: <https://lalrg.org>

## UC Retirement Centers

### UC Berkeley Retirement Center

Website: <http://retirement.berkeley.edu/>

Email: ucbrc@berkeley.edu

### UC Davis Retiree Center

Website: <http://retireecenter.ucdavis.edu/>

Email: retireecenter@ucdavis.edu

### UC Irvine Center for Emeriti and Retirees

Website: <http://retirees.uci.edu/>

Email: retirees@uci.edu

### UCLA Emeriti/Retirees Relations Center

Website: <http://errc.ucla.edu>

Email: emeriti@errc.ucla.edu

### UC San Diego Retirement Resource Center

Website: <https://blink.ucsd.edu/sponsor/hr/divisions-units/retirement.html>

Email: RetireeLink@ucsd.edu

### UC Santa Barbara Emeriti and Retiree Center

Website: <http://www.hr.ucsb.edu/retirees/emeriti-retiree-center>

Email: debra.martin@hr.ucsb.edu

### UC Santa Cruz Retirees and Emeriti Center

Website: <https://rec.ucsc.edu/>

Email: rec@ucsc.edu





# SURVEY RESPONDENT DEMOGRAPHICS (4,478 RESPONDENTS)

## GENDER



**67%**  
female

**33%**  
male

## AGE



**<1%**  
Younger than 55

**25%**  
55-64

**52%**  
65-74

**18%**  
75-84

**4%**  
older than 84

## YEAR RETIRED



**6%**  
2016

**36%**  
2011-2015

**24%**  
2006-2010

**16%**  
2001-2005

**7%**  
1996-2000

**8%**  
1991-1995

**3%**  
before 1991

## YEARS EMPLOYED AT UC



**5%**  
5-9 years

**24%**  
10-19 years

**36%**  
20-29 years

**32%**  
30-39 years

**3%**  
40+ years

## UC ENTITY

**54%**  
main campus

**19%**  
medical center

**14%**  
lab

**4%**  
office of  
the president

**<1%**  
field station

**8%**  
other

## DISTANCE FROM UC LOCATION



**84%**  
within 30 miles

**9%**  
elsewhere in state

**7%**  
outside state

**<1%**  
outside country







## UNIVERSITY OF CALIFORNIA CAMPUSES AND LABS

