

## **COMMITTEE ON EMERITI RELATIONS 2012-13 Annual Report**

To: Academic Senate, Santa Cruz Division

The Committee on Emeriti Relations (CER) met once each quarter during the academic year; members participated in several campus committees and interest groups – the Council of University of California Emeriti Associations (CUCEA), the Retiree/Emeriti Office Planning Committee, and the Santa Cruz Commons Project.

CER's work in 2012-13 largely focused on monitoring several changes to retiree health care eligibility and supportive programs, and continuing to explore the topic of Emeriti mentoring. The committee also reviewed and commented on the system-wide proposal of the Negotiated Salary Plan, and in spring quarter, co-sponsored (with the Office of Academic Personnel) a Pre-Retirement Planning Workshop to which all members of the faculty who were considering retirement were invited. A representative from the Office of Academic Personnel and three retired faculty members, including CER Chair Anderson, gave presentations at the workshop and an active discussion period closed the successful event.

CER representatives on the Retiree/Emeriti Office Planning Committee assisted in the planning and development of a campus Retiree/Emeriti Resource Center. The committee successfully secured an office at Kresge College in July 2013. CER will continue to participate in the development of the center in the coming year and looks forward to providing updates on the new campus resource in the 2013-14 academic year.

### **Healthcare Programs**

During the fall quarter, CER was informed that the UC Office of the President would be ending the funding provided to campuses for the Health Care Facilitator (HCF) Program as well as the retirement counseling activities that are performed on the UC campuses. Concerned that budget cuts would greatly affect Emeriti and faculty planning to retire, Chair Anderson and Committee on Faculty Welfare (CFW) Chair Barry Bowman met with Associate Vice Chancellor (AVC) Peterson in early January to discuss the issue. Similar conversations, and a strong push made by the system-wide Health Care Task Force (HCTF) as well as individual campuses, encouraged the Office of the President to reconsider the budget cut, and resulted in the preservation of the HCF program. Retirement counseling activities and advising were, however, moved to the UC Berkeley Retirement Administration Service Center (RASC). CER will continue to monitor the transition to RASC and any associated program changes.

### **Retiree Health Care Eligibility**

Along with the Committee on Affirmative Action and Diversity (CAAD) and the Committee on Faculty Welfare (CFW), CER voiced their concerns to the administration regarding the July 1,

2013 changes in retiree health care eligibility rules and the ‘grandfathering’ provision.<sup>1</sup> Members deemed the practice of two faculty or staff members who were hired at the same time with the same number of service credit years being provided different levels of care based on their age at hire, not only unfair, but immoral. As well, the committee recognized that a decrease in benefits, even those that are not “guaranteed” such as retiree health benefits, depletes the overall remuneration of salaries of faculty and staff on our campus. The committee further noted that such a reduction in the overall benefits package will unequally affect employees at UC Santa Cruz due to the elevated cost of living in Santa Cruz and may affect the retention of qualified faculty and staff on our campus.

Most notably, CER raised serious concerns regarding the new eligibility rules with respect to early retirement. One of the stated desirable goals of the changes is that they will help to retain knowledgeable faculty and staff by encouraging employees to work until the age of 65.<sup>2</sup> The majority of faculty work well past the age of 65. However, CER noted that the majority of faculty who retire before the age of 65, do so for health related reasons, and these are precisely the people who need adequate health benefits. For most in this category, “early retirement” is not something that is planned and as such, these faculty members may not have time to financially plan for increases in retiree health costs that were not expected. For current faculty and staff who may find that they cannot work until the age of 65 for health related reasons, CER contends that the new graduated eligibility formula not only appears unethical, but is inconsistent with UC values.

Although CER acknowledged at the time, that the then pending changes were not up for negotiation, UC Santa Cruz is one of few campuses with a senate Committee on Emeriti Relations, and as such, the committee determined that it was imperative that the committee’s voice and distress regarding this issue be noted for the record.

### **Emeriti Mentoring**

Last year, CER raised the possibility of developing an Emeriti mentoring project similar to one conducted by Emeriti at UC San Diego. The project provides an avenue for Emeriti to serve as mentors for low-income undergraduate students who are the first in their families to attend university. Members of CER remain convinced that a like project would be valuable to UCSC students and to the campus in general.

In order to assess interest in such a program, in 2012-13 the committee considered the possibility of conducting a survey of campus Emeriti to determine if there is interest in mentoring, and if so, in what areas. In 2013-14, CER plans to research campus mentoring projects that are already established in order to determine how interested faculty can get involved. After assessing what open avenues already exist for Emeriti participation, the results from a survey of Emeriti should clearly show whether existing programs can fulfill UCSC Emeriti mentoring desires or if there is a need to establish a new Emeriti mentoring project, mirroring that of UC San Diego.

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<sup>1</sup> Anderson to Galloway, Lee, and Sahni, 06/11/12, Re: Policy Changes to UC Post-Employment Health Benefits

<sup>2</sup> UC Office of the President, “THE FACTS: Retiree Health Benefits”, Web. 1 July, 2012  
<<http://ucrpfuture.universityofcalifornia.edu/files/2013/06/The-Facts-Retiree-health-6-10-13.pdf>>.

### **Acknowledgements**

The committee wishes to especially thank Committee Analyst Jaden Silva-Espinoza for her excellent staff support for CER during this year. She was most responsible while preparing agendas, researching information, and preparing meeting notes for the committee meetings. The committee would also like to thank Associate Vice Chancellor Pamela Peterson and the Academic Personnel Office for organizing the 2012-13 Pre-Retirement Planning Workshop Series. In particular, the committee would like to thank Administrative Analyst Linda Tursi, who assisted the committee in organizing the Emeriti panel for this event.

Respectfully submitted;

#### COMMITTEE ON EMERITI RELATIONS

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