

UCDEA Emeriti Welfare Committee

Annual Report

2014-15

This year the UCDEA Emeriti Welfare Committee and the Academic Senate Committee on Emeriti held joint meetings since the issues that were explored and acted upon were of concern to both committees. Also, I have had the privilege to chair both committees. Members of the UCDEA Committee are Jim MacDonald, Don Nevins, and Zuhair Munir. Alan Jackman, a member of the Emeriti Association Executive Committee, serves on the Academic Senate Emeriti Committee. The other members of the Senate Emeriti Committee are: Steve Brush, John Oakley, Francisco Samaniego, and Steven White.

A major activity of the joint committee during the 2014-15 academic year was to analyze results obtained from a survey on the level of satisfaction with campus-based retirement benefits counseling vs. the centralized system put in place by UCOP Human Resources Retirement Administration Service Center (RASC), and to develop recommendations based on the analysis.

The conclusions and recommendations are as follows:

- Although there was a significantly higher level of satisfaction with campus-based retirement benefits counseling over centralized counseling, the difference was not large enough to justify a return to campus-based counseling,
- Interactive retirement planning classes, such as the UC Davis Retiree Center's Transition to Retirement classes, facilitate retirement benefit counseling and improve the level of satisfaction.
- More staff and faculty planning to retire should be made aware of the availability of the classes and should be encouraged to take them.
- It is recommended that a goal of 90% satisfaction with retirement benefits counseling should be set by the RASC.
- Provision should be made for some individual counseling on campus or help in working with the RASC.
- A request should be made to UCOP Human Resources to provide an analysis of the value added by centralization of retirement benefit counseling.

These conclusions and recommendations were reviewed by the Faculty Welfare Committee, The Human Resources Advisory Board, the Council of Vice Chancellors and Deans, the UCDEA Executive Committee, the UC DRA Board, and the Retiree Center Advisory Committee. The full report was sent to the RASC and highlights of the report were presented at the CUCRA/CUCEA meeting in UC San Diego on April 30, 2015.

The recommendations of the report have been implemented. The Transition to Retirement will be offered on the UC DMC campus as well as on the Davis campus. RASC has developed a webinar to be used in preparation for its retirement counseling. RASC has increased the satisfaction goal for retirement benefits counseling to 90%; Davis Human Resources is providing individual counseling on campus for special cases or help in working with RASC; and Michael Waldman, manager of the RASC Customer Service Center, has announced that an analysis of the value added by centralization of the retirement benefit counseling will be conducted.

A second major issue of the 2014-15 academic year was a proposal by Dr. Jack Stobo, UC Senior Vice President for Health Sciences and Services, to change UC Care to a Health Maintenance Organization (HMO). There were rumors that once the Stobo proposal was implemented, the contracts with Kaiser and Healthnet would be discontinued.

The joint committee met with Robert May, a member of the UC Davis faculty, and chair of the University Faculty Welfare Committee's Health Care Task Force (HCTF). Professor May was familiar with President Stobo's proposal and his goal to implement the proposal during open enrollment in the fall of 2015.

The joint committee supported the action of Lori Lubin, Chair of the UC Davis Faculty Welfare Committee, in writing to President Napolitano stating that even if the Stobo proposal was in the interest of UC D faculty and staff, there should be time for Senate consultation and input and a goal to implement the proposal in the fall 2015 open enrollment was not realistic. Subsequently, a Task Force, including Robert May, was established to study Dr. Stobo's proposal. If the proposal is approved, the earliest it would be implemented would be 2017. Professor May assured the joint committee that the Stobo proposal is only for active faculty and staff and would not affect retiree health care plans.

Respectfully submitted,

Charles E. Hess
Chair

September 8, 2015