CUCEA/CUCRA Joint Meeting

The Joint Meeting took place in the morning at UC Santa Barbara’s Mosher Alumni House.

The substance of this meeting is in the RASC Reports and the responses of UCOP to the Joint Benefits Committee (JBC) Report (both attached to this email). The big issues were item #2, which may have future implications for our health care options and item #4 regarding the Health Care Facilitators.

1. Ellen Lorenz, the new Director of the Retirement Administration Service Center (RASC), gave an overview of this office through which we connect with the Office of the President. It supports 62,000 retirees, dependents and surviving family members as well as 33,000 former employees. The staff answers 103,000 phone calls and 17,000 pieces of correspondence per year. 84% of the folks that have contacted RASC have been satisfied with their overall experience. (See attached for more detail).

2. Michael Waldman spoke to the One Exchange program. One Exchange, formerly Extend Health, is the health care exchange that is available to all Medicare eligible retirees outside California for their supplemental coverage (4,347 people). UC does not get as good rates in the national Medicare insurance market as it does in the California market because the size of the group is not as great and does not provide much leverage. So the University decided to go with One Exchange for health care coverage for these out of state folks, despite repeated and significant reservations from the JBC, CUCRA and CUCEA. 4,208 retirees responded and signed up initially and 59 chose not to participate (had better options where they were). As part of “No Retiree Left Behind” the remaining 80 retirees have been attempted to be reached by phone or certified letter. The response to the signing up process, as reported by One Exchange, was 80% positive--20% dissatisfied, which JBC has suggested is unacceptable. JBC also noted that these figures are from a survey Berkeley did a survey and found that 40% were dissatisfied. Retirees who move back to California will be dealt with on a one-on-one basis as to whether they can take advantage of our health care options. (See RASC Report from UCOP for more details).

Dwaine Duckett, Vice President for Human Resources, UCOP attended our meeting assured us that there are NO PLANS to have One Exchange cover the California retirees at this point. Those who attended this meeting were a bit surprised, but pleased, with this response!

3. Anne Wolf, Communications Director for RASC is producing audio and materials about the retirement process. The issue for the campuses is how to make information about our local Retiree and Emeriti Associations and Centers available. Campuses were asked to send Anne a couple of bullet points about their associations that she could include in the materials (Mary or Brian, can you do this?).

4. Marjorie Casereo, newsletter editor for CUCEA, wrote a very thorough analysis and evaluation of the Health Care Facilitator Program that Lee forwarded to all of us on the UCSCRA Board. In that, she made recommendations for restructuring and continuing the program, especially as it relates to the budget.

Dwaine Duckett’s response to her report was hesitant, guarded, and a bit discouraging. He reported that when his office wanted information from the HCFs, some didn’t even bother to respond. He said he needed more information and he was going to ask CUCRA and CUCEA folks
to help. He also indicated that as much of the services for retirees as possible is going to be moved to RASC and will not stay with the HCFs. The JBC, CUCRA and CUCEA will continue to advocate for this valuable service.

CUCRA Meeting

As always, it is fun to see Lee up front and in charge—he runs a good meeting!

Item #1 may be useful to us as we work to get our Center established. We may have one-time program development costs that would qualify for this grant program, or we could apply for funds to send our Center staff person to one of the CUCRA meetings. Item #5, the two break out sessions, is something that Lee is instituting as part of these meetings. Both of these seemed to work really well, and we all commented about how much expertise there is in our group as a whole, and how little time there is to share it.

Thanks, Lee, for giving us that opportunity.

1. The proposal to establish a grant program was accepted and the Executive Committee will shepherd this process for the first year. Campuses may apply for grants from $500 - $1,500 once a year for attendance at conferences, initiatives to encourage campus associations’ growth, and special projects. Grants may not be used for normal operational expenses.

2. The proposal for CUCRA to help underwrite the meeting expenses for the sponsoring campuses was deferred to the Executive Committee to rework.

3. CUCRA voted to send the Chair and one additional person from a campus without professional staff to the AROHE conference.

4. The Joint Benefit Committee (JBC) Report was accepted. All agreed that it is important to get the report to the folks at OP well before the meeting so that they can prepare their responses. This results in much more fruitful interactions at our joint meetings, such as the ones we had this morning.

5. There were two breakout sessions, one on Volunteering on Campus (which I facilitated) and one on Leadership Development (which John Pitts facilitated). The volunteer session was a lively one and I asked San Diego to lead the way since they seem to be doing the most in this regard. They have weekly signups through their Center for various campus events and can keep track not only of who volunteers, but how many volunteer hours they contribute to the campus (2,000 this past year). They also have a Volunteer Coordinator position on their Board and a Volunteer Committee that reaches out to campus units and finds fun things to do. This might be something for us to think about. Most of their volunteering is for one-time events. For every event at which they volunteer, they take information about their Associations and Center—maybe this is why they have 17,000 members in their Retirees Association!!

All the background materials for the CUCRA meeting are on line at the CUCRA website.

Jenny Anderson
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Copy to Maxine Lane