Report to the Retirees Association  
CUCRA/CUCEA Joint Meeting  
UCSD Spring, 2015

It’s All about Leadership
UCSC is well represented at the helm of these two associations, and we should feel proud! We have Roger Anderson as Chair of CUCEA, Lee Duffus as Chair of CUCRA, and Dick Jensen (UCSC and UCSB) has just stepped up to be Chair of the Joint Benefits Committee. These folks are paving the way and providing responsible leadership by questioning how “business as usual” might be improved, by putting the pressure on UCOP to guide new options for health care, by asking for action to clarify tertiary beneficiaries for funds managed by Fidelity, and by proposing new ideas for reorganizing CUCRA and CUCEA to make them even more effective as advocates for retirees and emeriti. We are in very good hands.

UC Care HMO
David Kraus, Director of Health Services Contracting at UCSD, is heading a task force that is studying the feasibility of unifying all UC med centers (facilities and staff) into a single HMO system. Moving towards self-funding medical insurance is a way to save money both for employees and for the university. This new HOM would not come on line until 2017 at the earliest. For 2016, this will mean that there is no change in the current provider network.

How Does UCSD Get and Retain So Many Members?
UCSD has 1,800 members in its associations and the next closest campus is UCD with 887. They shared the activities that they have been able to coordinate with 1 full-time director, six part-time staff (3 FTE) and 4 student staff. Some things that they do that we might think about for our new Center are:
• Helping staff retain their UCSC email.
• Sponsoring an Emeriti/Retiree art show.
• Identifying volunteer possibilities and posting them on a Center website.
• Coordinating joint field trip events.

Feedback on Centralization of Retirement Benefits Counseling
Those who responded to a survey about the new centralized retirement counseling through the Retirement Administration Service Center (RASC) felt it was adequate, but preferred the campus-based counseling where they could talk to a real person. Of those surveyed, 91% were satisfied with campus-based counseling, 73% were satisfied with RASC counseling. UCOP felt that this difference wasn’t significant enough to return to the old campus-based system. Also noted, was that the satisfaction rate is 6% higher for both kinds of counseling if they are complemented by pre-retirement planning courses on campus, like the one that our Retirees Association coordinates each year. So, we should keep doing that, and we can supplement it with a presentation from Michael Waldman from UCOP. He is happy
to come to the campuses and do a session. This may be an event our new Retiree/Emeriti Center could sponsor in February and March.

**Check Your Beneficiaries if You Still Have 403(b), 475(b) or DCP Accounts with Fidelity**
Beneficiaries identified in your will or trust may not be the same as those listed with Fidelity and your will or trust does not affect what you have listed with Fidelity. Be sure to check the beneficiaries listed for your Fidelity accounts to make certain that the information is current and consistent with your intentions.

**Anthem/Blue Cross Data Breach and Identity Theft**
The JBC is requesting that UCOP provide a central place for folks to report identity theft issues that may have been caused by data breaches. They are also requesting that those affected be supported by information that comes from the University General Counsel.

**Reorganization Proposal**
Several campuses have expressed concern about the cost of sending representatives to the CUCRA/CUCEA meetings. We had a productive discussion trying to figure out ways to reduce expenses for the two organizations, host campuses, and individual associations. These ideas will be distilled and presented at the fall meetings in Davis.

Jenny Anderson
Retiree Association Representative to CUCRA