



The UCD *RETIREE*

Spring 2007 Newsletter

- In this issue:
- President's Message
- Annual Election
- 2007-08 Election Candidates
- By-Laws Extract: Elections
- Winter Meeting Highlights
- This and That...
- Charitable Gift Annuities
- Retiree Center Report
- Calendar
- Spring Meeting on May 7, 2007

President's Message

We send our congratulations and best wishes to Provost and Executive Vice Chancellor Virginia Hinshaw on being selected as the next Chancellor of the University of Hawaii, Oahu Manoa. Provost Hinshaw was instrumental in helping establish the new UC Davis Retiree Center, and University retirees are grateful for her leadership and support in making the new Center become a reality.

The Retiree Center held its first open house following the parade on Picnic Day. The open house gave University retirees an opportunity to meet the Center's Coordinator, Doreen Strnad, and to see its new facilities in Everson Hall. Retirees' Association officers and Board members were on hand to greet visitors.

The Steak Bake will be on Saturday, June 9 at the Rec Pool Lodge. Prime quality steaks will be provided by the UCD Animal Science Department and top flight chefs from the Retirees' and Emeriti Associations will grill the steaks to order. After dinner music will be provided by Calvin Handy's dance band. Plan to attend, as this promises to be a festive event and a nice opportunity to meet other Association members.

Recapping our year, the Association has been very involved with the Emeriti Association in assisting the Retiree Center in its first year of operation, planning new activities, providing interesting programs, and improving our data base. We extend our sincere thanks to 2nd Vice President Gil Apaka and Board members Corinne Cooke and Howard Frank who will be completing their terms in June and have contributed generously of their time and talent for the betterment of the Association. As we look ahead to 2007-08, the Association will be seeking to provide new and expanded opportunities for members to participate in cultural, intellectual and social programs, and to continue in our goal of providing advocacy and support of UC Davis.

- *Bob Halferty*

Annual Election

The UC DRA Executive Board is recommending to the general membership that, in order to provide leadership continuity advantageous to the establishment and development of the new UCD Retiree Center, the terms of office of the current President and 1st Vic-President be extended for one year.

Therefore, the Board is nominating Robert Halferty as President and Gary Schultz as 1st Vice-President, President-elect for additional one-year terms of office in 2007-08.

The membership vote on the term extensions will be held before the vote for the other officers and board members for 2007-08.

2007-08 Election Candidates

Election of officers and new board members for 2007-08 will be held at the Spring general meeting on Monday, May 7. The nominees are:

President:	Bob Halferty (continuing)
1st Vice-President/President-Elect:	Gary Schultz (continuing)
2nd Vice-President:	Yvonne Marsh
Secretary:	Norma Rice (continuing)

Treasurer: **Carol Kurtz** (second year of term)
New Board Members: **Lew Dudman, Ted Hillyer, Don McNary**
Continuing Board Members: **Beverly Brooks, Aggie Costantini, James Wilson**

Additional nominations for officers and new board members may be made by mail to the Nominating Committee, to be received by the Committee no later than seven (7) days prior to the election. Mail nominations to:

UCDRA Nominating Committee
UC Davis Retiree Center
University of California, Davis
1 Shields Ave.
Davis, CA 95616

By-Laws Extract: Elections

Section I. Eligibility for Nominations.

Any Regular Member shall be eligible for nomination to any office in the Association.

Section II. Nominations.

The nominating Committee shall prepare a list of candidates and shall send same to the Regular Members no later than fifteen (15) days prior to the third meeting, which is the time of the election. Additional nominations may be made by mail directed to the Nominating Committee, to be received by that committee no later than seven (7) days prior to the election. The Nominating Committee shall be responsible for preparing all ballots, which are, in turn, distributed by the Secretary.

Section III. Elections.

Election of officers shall take place at the third meeting. There shall be no absentee ballots. The Nominating Committee shall serve as the election committee, shall determine the results of the election, and shall report same to the membership.

Section IV. Voting.

The officers shall be elected by secret ballot if there is more than one nominee for a specific office; otherwise, a voice vote will be in order.

Section V. Installation.

Newly elected officers shall assume their duties on the first day of the fiscal year following their elections.

Calendar

- **May 7—UCDRA Spring Meeting**
- **May 10—Retiree/Emeriti noon talk**
- May 24—UCDEA General Meeting
- May 28—Memorial Day
- **Jun. 4—UCDRA Board Meeting**
- June 9—Steak Bake

Spring Meeting—Monday, May 7, 2007

Location: ARC Ballroom B

Social Hour/Refreshments: 2:00-2:30 p.m. Program: 2:30-4:00 p.m.

Topic: ***Election of Officers***

Tour of the Future: Capital Growth at UCD and How We Are Financially

John A. Meyer, Vice Chancellor, Resource Management

Parking is available in Lot 25. Some spaces will be reserved for those with limited mobility.

Winter Meeting Highlights

President Robert Halferty called the Winter meeting of UCDDRA to order at 2:30 p.m. on Feb. 5.

He introduced Donelle Perkins, interim director of the TriO Scholars Program, who spoke about the new program at UCD that will provide mentoring of undergraduate students by both retirees and emeriti. The program's goal is to help retain first-generation and low-income students, and those with disabilities. At present 160 are in the program, and there is a waiting list. Perkins will work closely with Doreen Strnad, coordinator of the UCD Retiree Center, to develop this mentorship program.

Halferty said that Osher Lifelong Learning Institute has mailed a letter to all retirees offering free membership. This is an opportunity to take courses at lower costs. He then reported that the Provost's Office has approved the continuation of Retiree parking permits at no cost for 2007 and 2008. He said that special thanks go to Charles Hess, UCD Emeriti Association, for his help.

Also, Halferty said, UCD will again host the Junior Olympic Games, June 23 to July 1, an event for young athletes, mostly 8-14 years of age.

Membership Committee Chair Aggie Costantini reported a balance on Sept. 30, 2006, of \$8,847.69 with total expenses at \$1,165.88. The balance on Feb. 2, 2007, was \$9,871.81. Current membership stands at 442, she said.

Costantini thanked the members for attending today's meeting and said that the membership committee is actively recruiting new members. The hope is to expand not only the membership but also social events.

Doreen Strnad reported that the Retiree Center is now located in 166 Everson Hall. The Provost approved an AA III position and recruitment will begin soon for the new person.

Forthcoming events include an entry in the Picnic Day parade as well as an open house on that day. The theme will be healthy aging. A Steak Bake is scheduled for Saturday, June 9, at the Rec Pool Lodge. Calvin Handy and his group will provide the music.

With the business portion of the meeting concluded, the program on Air Pollution, Climate Change and Health began. Researchers from several different departments on the campus described a range of activities under way to improve air quality. After a question-and-answer session, the meeting adjourned.

This and That...

- **Retiree/Emeriti Noon Talk**—The final speaker of the quarter will be Bill Lacy, speaking on *The Impact of International Programs on the UCD Community*, at 11:30 a.m., May 10, International House. Bring a bag lunch.
- **The Emeriti Association** will hold its spring general meeting at 2 p.m. at International House on May 24. The speaker will be Cheryl Brown Lohse discussing *The UCD Comprehensive Campaign*.
- **The June 4 UCDDRA Board meeting** will be held at UCDDMC. Beginning in the morning, it will include lunch and tour of new facilities.
- **CUCRA Meeting Note**—A new education program specifically designed for retirees who are participants in the UC investment programs (403 (b) plans, etc.) will begin later this year. Topics will include basic information on the plans available, eldercare and health care, effect on benefits of a return to work, and beneficiary designation, among others. Details will be included in the direct mailings from the Office of the President.

Charitable Gift Annuities

Retirees can do good for themselves while doing something good for UCD through the Charitable Gifts Annuities program. One of the planned gift alternatives, CGA's benefits include:

- An immediate income tax deduction
- A generous fixed income—guaranteed for life
- Partially tax-free income

- Avoidance of the capital gains tax on the sale of highly-appreciated assets
- Potential reduction in the estate tax
- Providing a future gift to benefit a UC Davis program they want to support

A CGA is a written agreement between donor and UCD in which the campus—in exchange for an irrevocable gift of cash or securities—agrees to make fixed payments for the life of the donor or a loved one. Payments can begin immediately or be deferred to a date the donor selects—the longer the deferral, the higher the payout rate and tax deduction.

Donors should consider a CGA when they want:

- A generous fixed income guaranteed for life
- To increase the income they receive from bank CDs, money market accounts, or stock dividends
- An income tax deduction to reduce their taxes
- To simplify their lives and consolidate several stock holdings into one fixed income source
- To avoid the capital gains tax on the sale of appreciated stock
- To make a lasting difference at UC Davis

For additional information, get in touch with John Koch, director of planned giving, at 530-757-8332 or jfkoch@ucdavis.edu.

Retiree Center Report

From the coordinator, Doreen Barcellona Strnad

Spring time finds the UC Davis Retiree Center as busy as ever. We are in the midst of sending out our first major mailing to over 4,000 UC Davis retirees and emeriti, announcing the opening of the new Retiree Center. The mailing also doubles as a means for people to request information about the Retirees' Association. We hope it will build up enthusiasm for the Center as well as increase membership in the Retirees' Association.

The spring season also kicks off the "countdown-to-retirement" for many UC Davis employees with the last week of June the most popular time to officially retire. The retirement analysts in both Benefits Offices pretty much keep back-to-back appointments with individuals, beginning in April through the end of June. This year, as part of their packet, newly retired staff will receive information about the new UC Davis Retiree Center. We want to be sure to catch the next wave of retirees before they leave campus.

Our debut on Picnic Day was a huge success. It was great fun to participate in the parade for the first time. Our Open House was enjoyable as well as educational. Stay tuned for an even more exciting Picnic Day Open House in 2008!

The Center is also in the process of interviewing for an assistant. We are very lucky to have this new position approved and are looking forward to having another staff person on board to help with the many exciting events and projects on the horizon. By the time you receive the fall issue of this newsletter, the assistant will have been on board for several months. We will be sure to introduce the new staff-person at the General Meeting in October.

Stayed tuned for the following:

- "Steak Bake" on June 9th
- Retirees' Association web site whit summer
- Expanded mentorship program in late September
- "Fall Wine Festival" in October

As always, I welcome your ideas, suggestions and feedback. Feel free to contact me at 530-752-5182 or dastrnad@ucdavis.edu.

- Doreen Barcellona Strnad