

## UC Davis Retirees' Association Executive Board Meeting

Thursday, September 12, 2013, 1:15 – 4:15 p.m.

UC Davis West Conference Room (adjacent to AGR Hall)

### Agenda

1. **Introductions and Announcements** – All
2. **Approval of the June 2013 Minutes** - submitted by Norma Rice
3. **Treasurer's Report** - Diane Mundy
4. **UCDEA report** – Lyn Lofland
5. **Board Orientation** - Phyllis McCalla
  - a. Binder materials
    - ✓ UCDRA brochures
    - ✓ Retiree Center's "Stay Connected" brochure
    - ✓ Current list of UCDRA-board members and committee members
    - ✓ 2013 – 2014 UCDRA meeting/major event schedule
    - ✓ Committee and officer duty statements
    - ✓ 2012 - 2013 annual committee reports
    - ✓ Most recent *Campus Connections* newsletter
    - ✓ UCDRA Bylaws
    - ✓ Retiree Center calendar
  - b. Brief past history of board operation
  - c. Brief new board operation
  - d. **Mini Workshop** - Phyllis McCalla
    - ✓ Board introductions - board members
    - ✓ Planning Thoughts from June 2013 minutes
      - Review our committee structure each year to see what we need, can eliminate or need to add
      - Place all the descriptions of our duties on our website
      - Make sure our efforts to archive our past events have a link to our future efforts
      - Use positive wording in all of our documents
      - Keep our website up to date
      - Ask people to do limited term, focused tasks to bring them into the organization
      - Continually highlight that we are a valuable resource to both the campus and individuals (i.e. help individuals as an example, partner with the International House)
      - Involve more groups in our activities and promote visibility
      - Work on more clearly developing our identity and make sure that "membership" in our Association is understood
      - Look at our newsletter in an effort to distinguish ourselves from the Retiree Center
      - Make sure that at Picnic Day the prepared script is read and develop a feeling that "We want you!"
      - Reconsider our agenda and perhaps develop a consent agenda
      - Continue to have a presence in Sacramento
      - Wiggle into many places to further our Association and its value
      - Highlight who is doing what to aid the community and the campus
      - Clearly define advocacy efforts and be as clear and helpful as possible
6. **Old Business** - Items that have come to an end
7. **Continuing Business** - carried forward from last meeting
  - a. Officer statements – Phyllis McCalla
    1. Archivist
    2. By-Laws
  - b. Annual reports – Phyllis McCalla

**8. New Business**

- a. 2013 - 2014 budget - Diane Mundy
- b. Picnic Day honoree selection - Phyllis McCalla, Gloria Alvarado, Sandy Filby
- c. Non-Profit Organization --Karen Castelli and Janet Hamilton
- d. Noon Lunch Program - proposal to rename
- e. Holiday luncheon
- f. UCDDA 25th anniversary - Phyllis McCalla / Janet Hamilton
- g. Fall Fest - re-invented - Sue Barnes
- h. **Special Presentation** (scholarship recipient presentation) purpose Oct general meeting as time and location - Maggie Ahern

**9. Working Agenda - discuss project, develop, finalize**

- a. UCDDA survey – Phyllis McCalla
  - review the survey so it can be sent
  - provide an incentive for membership to complete survey \$50 - \$100 American Express gift cards (2)
  - Deadline of December 1, 2013
  - Compile/review survey results and write report for publication (Campus Connections) and letters/email, and UCDDA website
- b. UCLA Retiree's Association Survey - Reference Material

**10. Consent Agenda - Committee Reports – Chairs/Appointed Representative**

- |  |                                    |                                    |
|--|------------------------------------|------------------------------------|
| a. Archive Committee - Deanna Falge-Pritchard, Chair | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |
| b. By-Laws - Silvia Hillyer, Chair                   | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |
| c. Campus Community Council – Lucy Day, Rep          | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |
| d. Campus Connections - Kate Mawdsley, Co-Editor     | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |
| e. CUCRA/CUCEA – Barbara Nichols, Rep                | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |
| f. Membership renewal timeline - Yvonne Marsh, Chair | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |
| g. Nominations - Janet Hamilton, Chair               | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |
| h. Program - Louis Campos & Bill Wagman, Co-Chairs   | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |
| i. Public Relations - Rose Romant, Chair             | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |
| j. Scholarship - Maggie Ahern, Chair                 | <input type="checkbox"/> submitted | <input type="checkbox"/> no report |

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**Mark your calendars!**

**Fall quarter 2013 UCDDA/UCDEA/Retiree Center events:**

- **Fidelity Help Desk, "Accessing Your Account Online"**—Tuesday, September 17, 2 – 4 p.m., Conference Center
- **UCDDA Board Meeting & Noon talk**—Thursday, October 10, 11:30 a.m. – 1 p.m. & 1:15 – 2:45 p.m., Alumni Ctr.
- **Planning Your Legacy workshop**—Tuesday, October 22, 1:30 p.m., Alumni Center
- **UCDEA/UCDDA Fall Meeting**—Wednesday, October 30, 1:45 – 4:30 p.m. (program 2:30-4), Conference Ctr.
- **UCDDA Board Meeting & Noon talk**—Thursday, November 14, 11:30 a.m. – 1 p.m. & 1:15 – 2:45 p.m., Alumni
- **Campus tour: Craft Center**—Wednesday, November 20, 10 a.m.
- **UCDDA Board Mtg & Holiday Luncheon**—Thursday, Dec. 11, 11:30 a.m. – 1 p.m. & 1:15 – 2:45 p.m., Alumni
- **Day trip: *The Book of Mormon***—Sunday, December 15 (sold out)

**Winter quarter 2013 UCDDA/UCDEA/Retiree Center events:**

- **UCDDA Board Meeting & Noon talk**—Thursday, January 9, 11:30 a.m. – 1 p.m. & 1:15 – 2:45 p.m., Alumni
- **Fidelity Help Desk**—Tuesday, January 21, 2 – 4 p.m., Conference Center
- **UCDEA/UCDDA Winter Meeting**—Thursday, February 13, 1:45 – 4:30 p.m. (program 2:30-4), MIND Institute
- **Day trip: Oakland Museum, Spenger's Fish Grotto & Takara Saki**—Wednesday, February 19
- **Campus Tour: UC Davis Medical Center Pavilion**—Wednesday, March 5
- **UCDDA Board Meeting & Noon talk**—Thursday, March 13, 11:30 a.m. – 1 p.m. & 1:15 – 2:45 p.m., Alumni

## **UC Davis Retirees' Association Executive Board Meeting**

Thursday, September 12, 2013

1:15 – 4:15 p.m.

Alumni Center, West Conference Room

### **Meeting Minutes**

Present: Sue Barnes, Karen Castelli, Lucy Day, Micki Eagle Faulkin, Deanna Falge-Pritchard, Sandra Filby, Bob Halferty, Janet Hamilton, Lyn Lofland, Diane Mundy, Barbara Nichols, Linda Vieira, Bill Wagman, Phyllis McCalla, President

Unable to Attend: Maggie Ahern, Gloria Alvarado, Louis Campos, Ted Hilyer, Silvia Hilyer, Yvonne Marsh, Kate Mawdsley, Norma Rice, Rose Romant

#### Introductions and Announcements

President Phyllis McCalla called the meeting to order at 1:15 p.m. She gave a brief welcome to all. Introductions were postponed to later on the agenda.

McCalla announced that Norma Rice had undergone surgery, and was doing well. Board members expressed best wishes to Norma for a speedy recovery.

#### Approval of Minutes

Minutes from the June 13, 2013 were handed out. Bob Halferty gave a motion to approve. They were seconded by Sandy Filby. Minutes were approved.

#### Treasurer's Report

Diane Mundy reported memberships collected in July and August amounted to \$2,210. The staff scholarship was awarded in the amount of \$1,000, and stamps and other miscellaneous items were purchased. The balance is \$18,024.33.

The beginning balance is different from June 15 due to payments made during the summer; the financial statement which includes June is available if anyone wants to see it. The previous year's statement is also available.

#### UCDEA Report

Lyn Lofland reported the decision was made today to table the question of the Emeriti College, mostly due to a lack of enthusiasm. It was felt the EA already does much of what an emeriti college would do. The exception would be the space, such as a house or other facility, which is not currently available.

The EA has made a decision to have morning coffees with campus administrators. John Meyers will be the first person in November. It was suggested the RA might want to send 1 or 2 representatives, if anyone is interested.

The EA has decided to do something about their web page. A small committee was formed to rethink what ought to be included on the page and if they might need a webmaster.

Sue Barnes noted that Marjorie would be moving the database to the Development Office, hopefully this fall. If each association wanted to have its own webmaster the Retiree Center would welcome that.

Phyllis stated Joanne Bookman was the website committee chair for EA, and suggested Deanna be included on the committee. Phyllis indicated she has a hard time maneuvering the RA website and would like to see some changes and updates.

The EA decided against participating in the Picnic Day carriage. The main reason was it is the RA's major way to honor someone; the EA has other ways in which to honor their association members. Honoring someone from the EA would dilute honoring someone from the RA.

#### Board Orientation

Binder Materials – Binders were passed out to the board members containing the mission statement, by-laws, and other materials. Committee and officer duty statements are meant as resource information. Any changes in duties may be brought back to the board for discussion.

#### ***Brief past history of Executive Board operation***

**Agenda items have been listed in the following order:**

1. Introductions and Announcements
2. Invited Speaker when possible
3. Approval of the Minutes
4. Retiree Center Update
5. Emeriti Association Update
6. Treasurer's Report
7. Committee Reports – Chairs
  - a. Membership Committee
  - b. Public Relations and Media Committee
  - c. Nominations Committee
  - d. Program Committee
  - e. Campus Connections
  - f. Scholarship Committee
8. Old Business
9. New Business

#### ***Brief new board operation***

This year Phyllis McCalla plans to operate by using a non-traditional consent agenda with the intent to operate more efficiently allowing for group discussions, problem solving and planning with less time spent on 'standard' committee reports. Most consent agendas would place committee reports prior to old-continuing-and new business items.

She plans to have committee chairs submit reports one week prior to the board meeting notice so the reports can be included in the documents sent by Sue Barnes. Reports will be discussed if a board member indicates they have an issue or want more clarity of the submitted report.

Announcement items from the Retiree Center will be listed at the bottom of each month's agenda. Questions from board members will be answered just prior to ending the board meeting.

Future agendas will look similar to the September 12, 2013 agenda minus item 5 Board Orientation.

- 1. Introductions and Announcements – All**
- 2. Approval of the June 2013 Minutes** - submitted by secretary (in writing prior to meeting)
- 3. Treasurer's Report** - submitted by treasure (in writing prior to meeting)
- 4. UCDEA report** – representative from EA
- 5. Old Business** - Items that have come to an end
- 6. Continuing Business** - carried forward from last meeting

7. New Business
8. Working Agenda - discuss project(s), develop plan, finalize
9. Consent Agenda - Committee Reports – Chairs/Appointed Representative
  - a. Name of Committee - committee chair submitted no report
  - b. etc.

**Written list of UCDRA/UCDEA/Retiree Center** events - submitted by Sue Barnes

#### Mini Workshop

Board Introductions – Introductions were expanded so each member could tell something about themselves in order to get to know everyone better.

Planning Thoughts from June 2013 Minutes – Board members were asked to review and prioritize planning thoughts from June 2013. Discussion ensued, with many suggestions made, such as:

- o Many of the Thoughts could be consolidated under the heading of Public Relations.
- o We need to find a way to increase membership, in order to increase income. Suggestions included looking for ways for retirees to have fun, and emphasize the resources available to retirees.
- o Review committee structure every other year instead of each year. Phyllis looked at the structure of some of the committees and found some may not be needed except for 1 week per year such as the Audit Committee of which Sharon Henn served on during 2012-13. If anyone has any issues with committees, bring to the board in order to develop an action plan.

Due to time running out, this item will be continued to next meeting.

#### Old Business

There was no old business.

#### Continuing Business

Officer Statements – Every position must submit an annual report. This includes officers, members-at-large, and Committee chairs. The reports are due at the end of each year. Reports should be submitted via e-mail. Some annual reports have not yet been submitted.

#### New Business

**2013-14 Budget** – Diane Mundy reported there is a negative balance for the 2013-14 budget. Membership dues were a conservative estimate.

Also Atria has previously donated catering services resulting in cost savings. However UC has strict licensing requirements, and because Atria does not have the correct license, they will not be allowed to cater on campus any more. Sue Barnes will talk with the University Retirement Community (URC) to see if they are a possible catering vendor.

Catering expenses were discussed for the Fall Meeting and the Fall Fest, but it was determined the estimates should remain the same. The Fall Fest already has 140 people registered; there is only seating for 100. If it is good weather so people can be outside, Sue will let people know who are on the waiting list. If any Board members wish to go who have not yet signed up, they are urged to do so right away.

Also discussed was the possibility of becoming a non-profit so we could request donations, and the possible expenses for that to happen. There was discussion about proceeding with a negative balance. It was also suggested that because we would like to give a larger scholarship, it be added to the deficit.

There was a question if it would be more cost effective to go through the University, rather than becoming a non-profit. That way we could open the account now and solicit funds at the Fall meeting.

There was a motion from Sandy Filby to open a UC account in order to solicit more funds. It was seconded by Lucy Day.

Additional discussion ensued. Karen Castelli, a member of the committee looking into the possibility of the non-profit, suggested we should not be in a hurry, but find out all the facts in order to make a well-thought out decision for the long-term. There seemed to be a consensus to go this route.

Additional discussion centered around increasing membership. Suggestions included looking at the social events, reaching more retirees statewide, not just in the Davis area, using Facebook, stressing our causes such as the scholarships. Sue has a database of retirees for special mailings.

Sandy Filby withdrew her motion. Diane Mundy suggested the following: the expense for the carriage be reduced from \$500 to \$400, and the expense for the non-profit of \$600 be deleted because it is not likely to happen this year. It is also hoped we can find an attorney who will help us for free. There has been membership growth, so the remaining negative balance will be balanced out by increasing the amount for the membership dues.

Mundy made a motion to accept the budget as amended; Janet Hamilton seconded the motion. The motion passed.

**Picnic Day Honoree Selection** – The Picnic Day Honoree will be for UC/DRA only, as the EA decided not to participate. If you wish to submit a nomination, fill out the form and send to Marjorie at the Retiree Center. The deadline is November 1. The slate of nominees will be submitted to the Board at the December meeting.

**Non-Profit Organization** – Karen Castelli and Janet Hamilton are the committee members; the EA member is Joel Dobris. In addition to the services of an attorney, we have also been advised that an accountant would be useful.

It was also noted that because UC has stringent requirements regarding the service of alcohol on campus, if we have non-profit status we can do a cash bar at events in order to raise additional money.

**Noon Lunch Program** – proposal to rename – There has been a proposal to rename the Noon Lunch Program. The new name would be Brain Food Talks.

**Holiday Luncheon** – Sue said Plutos will be catering the Holiday luncheon. It will need to be \$20 per person in order to break even. Program Committee Chair Bill Wagman should coordinate with the Davis High School Madrigals, and also will be in charge of the decorations and food. Sandy Filby, past program chair, offered to help. Phyllis suggested a holiday decorating committee.

**UC/DRA 25<sup>th</sup> Anniversary** – The UC/DRA's 25<sup>th</sup> anniversary is October 30 of next year (2014). The original meeting was in 1989 at the University Club. Deana Falge Pritchard is committee chair. It was suggested it be included as part of the Fall meeting 2014. We could request the Chancellor come to speak – we should get the request on her calendar right away. An alternative would be Vanderhoef. Sue will work with Deanna to invite the chancellor.

**Fall Fest reinvented** – As previously mentioned, Fall Fest has 140 people registered. If any Board members have not yet signed up, please do so right away if you are interested.

**Special Presentation** – The scholarship recipient has already received her money, but there will be a presentation at the October general meeting. Sue or Maggie will contact her to request her presence.

Working Agenda

**UCDRA Survey** – Board members were asked to review the survey. There were a number of comments. Some thought the UCLA survey looked more friendly. The number of questions related to volunteering were questioned, as well as the question regarding family care. The reasoning is that the survey is used for a bargaining tool. The information about how retirees use their time and the amount of volunteering for UC is used to gain many concessions from campus, such as the parking permits and advocating for the retiree center. One suggestion was that if it is explained why we are asking, more people may be willing to answer.

The survey will be delayed until later in the year so these issues can be addressed.

The UCLA Retiree's Association Survey was intended to be used as reference material.

Sue discussed sending out future board materials using a drop box instead of e-mailing. It would require downloading Dropbox to individual computers or accessing the documents through a web link.

Sue has been advised she will not be able to lead the trip to the Panama Canal due to conflict of interest. UC Davis retiree Barbara Anderson will lead instead.

Consent Agenda – Committee Reports

The Committee Reports will use the Consent Agenda format.

If anyone has any questions or concerns about submitted committee reports you should bring the matter up at the board meeting. Let Phyllis know at least 8 business days before the meeting so the item can be added to the agenda. If that is not possible you should still bring up the matter at the board meeting.

The meeting was adjourned at 4:15 p.m.

Respectfully Submitted,  
Linda Vieira  
Secretary

UC Davis Retirees' Association  
2013-2014 YTD Membership and Financial Report

**Membership Report**

Meeting Date	9/12/2013	10/10/2013	11/14/2013	12/12/2013	1/9/2014	no mtg	3/13/2014	4/10/2014	no mtg	6/12/2014		
	June	September	October	November	December	January	February	March	April	May	June	Net +/-
Annual	326	421										
Associate	5	5										
Life	481	497										
<b>Total</b>	<b>812</b>	<b>923</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	

**Financial Report**

Beginning Date	7/1/2013	9/1/2013	10/1/2013	11/1/2013	12/1/2013	12/31/2013	2/1/2014	3/1/2014	4/1/2014	5/1/2014	Budget	YTD Totals
<b>Beginning Balance</b>	\$ 17,090.33											\$ 17,090.33
<b>Credits</b>												
Memberships	2,210.00										6,700.00	2210.00
Interest												0.00
Other Donation												0.00
<b>Subtotal: Credits</b>	<b>-</b>	<b>2,210.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>6,700.00</b>	<b>2210.00</b>
<b>Debits</b>												
<b>Events</b>												
New Retiree Reception											1,500.00	0.00
Picnic Day (carriage)											500.00	0.00
Fall Fest (formerly Steak Bake)											500.00	0.00
<b>Meetings</b>												
Fall Meeting											700.00	0.00
Winter Meeting											250.00	0.00
Spring Meeting											240.00	0.00
<b>Other</b>												
Staff Scholarship	1,000.00										1,000.00	1000.00
Membership supplies	276.00										450.00	276.00
Staff Gifts (RC)											60.00	0.00
CUCRA Travel/Reg											900.00	0.00
AROHE Travel Expense											1,100.00	0.00
AROHE Dues											100.00	0.00
CUCRA Dues											450.00	0.00
Non-profit status fee											600.00	
Misc/Other											500.00	0.00
<b>Subtotal: Debits</b>	<b>-</b>	<b>1,276.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>8,850.00</b>	<b>1276.00</b>
<b>Ending Balance</b>	<b>\$ 18,024.33</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ (2,150.00)</b>	<b>\$ 18,024.33</b>
<b>Ending Date</b>		8/31/2013	9/30/2013	10/31/2013	11/30/2013	12/30/2013	1/31/2014	2/28/2014	3/31/2014	4/30/2014	5/31/2014	



UCLA Staff Retirees  
Participation/Achievement/Contribution Survey Report  
2009 - 2010

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## Introduction

The UCLA Staff Retirees Participation/Achievement/Contribution (PAC) survey was undertaken by the Emeriti/Retirees Relations Center (ERRC) to collect data to enable University of California and UCLA decision-makers to become more knowledgeable about staff retirees' interests and activities.

The letter to retirees explaining the purpose of the survey allowed that tooting one's own horn is sometimes appropriate and necessary. Certainly not more so than in the current economic environment when scarce resources are continually being examined to determine how they should be allocated. The survey was structured to provide staff retirees the opportunity to share information regarding their:

- ✦ Connection to UCLA.
- ✦ Involvement in their communities.
- ✦ Commitment to their own personal growth.

The questionnaire consisted of 12 items designed to elicit responses related to the survey's objectives as well as to update retiree records in the ERRC database. The "Comments" area of the survey permitted respondents to elaborate and to add details not covered in the questionnaire.

Of the 5,770 retired staff contacted, 1,506 or 26% responded.

The results were compiled using Microsoft Excel and its built-in functions.

## Executive Summary

The Participation/Achievement/Contribution (PAC) survey completed in January 2011 provided sufficient data to develop a staff retiree profile. The information below summarizes the survey results by category.

### UCLA Involvement

Many staff retirees never leave campus. More than 450 or 30% of those responding remain involved with UCLA. They continue to volunteer their considerable experience, expertise and talent to campus departments and programs. They participate in fundraising activities, serve on advisory boards and committees, and make personal financial donations. A number of retirees also resume employment with UCLA either on a full or part time basis as indicated by the 250 responses in that category of the survey.

### Community Involvement

There were 1,376 responses related to staff retirees' participation in myriad community based efforts, including: tutoring students, delivering meals on wheels and working in food banks. Retirees are mentors, foster grandparents, school aids and crossing guards; they participate in animal adoption and disaster relief; they are involved in their churches, synagogues, mosques and neighborhood organizations; a few serve in the Peace Corps and Americorps. The University of California advocates community involvement. *Our University*, the UC President's newsletter, regularly features faculty and staff who use their free time in community service as "People Who Make a Difference". UCLA Chancellor Block has created a Volunteer Center for the purpose of "Making a Difference in Our Communities". The "UCLA Staff Retirees....*continuing to make a difference*" segment of this report illustrates that retirees' participation is in the spirit of the UC call for civic engagement. It also shows that staff retirees are committed to the vision and mission of the University.

### Education

Self-improvement, skill enhancement and intellectual stimulation are significant aspects of UCLA staff retirees' post-employment lifestyle. They are enrolling in courses for credit, joining study groups and book clubs and learning to use new technology. There were more than 1,700 responses or 115% for this survey category, which suggests that some respondents are taking courses while figuring out how to download textbooks or the current book club selection to their Kindle. By remaining mentally active UCLA staff retirees enhance their own well-being and their ability to continue to contribute to the University and their various communities.

### Employment

Entrepreneurship is an element of the retirement experience for 109 respondents who reported that they are self-employed. The remaining 250, or 17% of those responding, have full or part time employment. Most retirees with jobs are working part time either at UCLA or for other employers.

### Political Involvement

Participation in efforts such as registering people to vote, serving on election committees and supporting candidates and causes is reported by 23% of respondents.

### Awards/Honors/Recognitions

Awards for community service were earned by 52% of survey respondents in this category. The remaining 48% were recognized for the excellence of their participation by various professional, educational and political organizations.

### More or Less Busy during Retirement

Only 25% of respondents in this category are less busy now than they were before retirement, while 34% are busier now. The number of those for whom there has been no change is also 34%, leaving 7% unreported.

### More or Less Time Spent on Other Activities

Approximately 58% of the responses for this category reveal that retirees are devoting more time to activities such as traveling for pleasure, socializing with friends and being involved with family during post-employment. A mere 11% of the responses indicate less time is being spent. The remaining 31% have not changed.

## Tally of Responses

<b>Total Number Contacted</b>	<b>5,770</b>
<b>Responses</b>	<b>1,506</b>
<b>Response Percentage</b>	<b>26%</b>
% of Total Response - Female	71%
% of Total Response - Male	25%
% of Total Response - Undeclared	4%
<b>Average Number of Years Retired from UCLA</b>	<b>12</b>

### **UCLA Involvement**

UCLA Retirees' Association (UCLARA)	54
Chancellor's Civic Engagement Volunteer Program	4
Campus-based volunteer program	51
UCLA Government Relations Program	51
Campus fundraising initiatives	20
Made personal financial donations to campus programs	168
Served in an advisory capacity to campus programs	51
Something else	58
<b>Total</b>	<b>457</b>

### **Community Involvement**

Meals on Wheels	33
Big Brothers / Big Sisters	5
Foster Grandparents	7
Peace Corps	3
AmeriCorps	2
Tutoring students	72
Food Bank / Food Pantry	73
Mentoring another person	133
Hospital / Hospice	63
Disaster relief / assistance	23
School Aide / Crossing Guard	20
Church, synagogue, or mosque	284
Library / literacy programs	87
Animal adoption / assistance	61
Gang intervention	8
Neighborhood / civic involvement	199
Something else	303
<b>Total</b>	<b>1,376</b>

**Education**

Enrolled in education courses for credit	138
Participated in informal study groups	302
Audited educational courses	116
Participated in book clubs	230
Learned a new skill (fishing, knitting, etc.)	301
Learned to use a new technology (cell phone, digital camera, etc.)	565
Something else	72

**Total** 1,724

**Employment**

Self-employed	109
Working full-time for an employer (including UC)	64
Working part-time for an employer (including UC)	186
<b>Total Employed</b>	<b>359</b>

**Political Involvement**

Registered people to vote	63
Helped at an election polling place	82
Made phone calls or canvassed for candidate / cause	150
Served on election committees	19
Elected to a public office	7
Something else	27
<b>Total</b>	<b>348</b>

**Awards/Honors/Recognition**

Professional	76
Educational	32
Political	10
Community Service	128
<b>Total</b>	<b>246</b>

**More or Less Busy during Retirement**

More	516
Less	372
About the Same	512

More or Less Time Spent in Other Activities

Travel for pleasure	
More	606
Less	249
About the Same	409
Personal interests or hobbies	
More	827
Less	100
About the Same	304
Being involved with family	
More	808
Less	58
About the Same	419
Socializing with friends	
More	650
Less	136
About the Same	495
Volunteering	
More	574
Less	142
About the Same	332
Exercising	
More	712
Less	161
About the Same	394
Using Internet	
More	725
Less	111
About the Same	274

## UCLA Staff Retirees

*...continuing to make a difference*

### Introduction

This segment of the PAC Report augments the response tally. It provides a more in-depth representation of today's staff retiree by highlighting the achievements of a few of the many who are making a difference. This is not to discount the contributions being made by other survey respondents who are engaged in volunteerism and community service in an ongoing and substantial manner. The purpose is to reflect the diversity of staff retiree participation.

The outline below lists the three expressions of retiree achievement presented in this section:

#### I. Featured Retirees

Dr. Ernestine Elster	UCLA Cotsen Institute of Archaeology Research Fellow at the School for Advanced Research (SAR) Santa Fe
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Dorothy Jennings	Founding Member of the Creative Retirement Institute (CRI) of Edmonds Community College in Edmonds WA
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Tom Tugend	Journalist and Contributing Editor for the Jewish Journal of Greater Los Angeles
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#### II. List of Awards, Honors and Recognitions

#### III. List of Respondent Comments



...continuing to make a difference



Dr. Ernestine S. Elster – Dr. Elster retired from the UCLA Cotsen Institute of Archaeology after 27 years of service. She has been named Research Fellow to the School for Advanced Research (SAR) Santa Fe by the Institute and is the Principal Investigator for a National Endowment of the Humanities (NEH) supported project in southeast Italy (UCLA-University of Genoa). The project is described in detail on the SAR website featuring Dr. Elster.

The article titled: *Scaloria Cave: Ritual and Landscape in the Mediterranean Neolithic* reports that: Grotta Scaloria, a double-chambered cave in southeast Italy, was first discovered in the 1930s by workers digging in the Tavoliere Plain of Puglia for the installation of an aqueduct. When the workers unexpectedly exposed a crevice, the local museum mounted a limited excavation. The cave was then closed to await further interest and funding, but events leading up to WW II and the war itself intervened. At some point, the "tombaroli" entered illegally and what was removed will probably never be known. Scaloria's first excavations left archaeologists aware of the cave, its connection to the Neolithic period, and its potential for much more research.

After WW II, geographers observed that air reconnaissance photos taken of the Tavoliere Plain clearly indicated circular trenches cut into the soil. Exploring these circular "ditches," archaeologists realized that these were enclosed clusters of Neolithic dwellings. Slowly work began on these "hamlets," and during the 1960s the cave's second phase of excavation began. Then, from 1978 to 1980, the late UCLA Professor of European Archaeology Marija Gimbutas joined the late Professor Santo Tiné in a joint project at Scaloria Cave. The excavated materials were stored in the local Puglian museums, Marija Gimbutas' notes and papers archived after her death (1994) in California, and Professor Tiné's documents filed at his home institution, the University of Genoa.

Shortly before her death, Marija Gimbutas asked Ernestine Elster to promise to see to it that the important work at Scaloria was published. And thus, several years later and with the support of the Cotsen Institute of Archaeology at UCLA—and during September 2010, the School for Advanced Research—Dr. Elster is working with an extensive group of collaborators, especially John Robb, Eugenia Isetti, Antonella Traverso, on an interdisciplinary and international effort to finally combine the materials from all of Scaloria Cave's excavations into a fully documented excavation monograph.

**UCLA Emeriti/Retirees Relations Center  
Participation/Achievement/Contribution Survey**

Q1. In the past 12 months, have you volunteered your time (without pay) to any of the following programs at UCLA? ***Please check "YES" for each applicable activity below.***

Q1a. For each activity checked "YES", please indicate approximately how many hours you devoted each month, on average?

	<input type="checkbox"/> YES	<u># of Hours</u>
UCLA Retirees' Association (UCLARA)	<input type="checkbox"/> YES	_____
Chancellor's Civic Engagement Volunteer Program	<input type="checkbox"/> YES	_____
A campus-based volunteer program	<input type="checkbox"/> YES	_____
Participation in UCLA Government Relations Program	<input type="checkbox"/> YES	_____
Campus fundraising initiatives	<input type="checkbox"/> YES	_____
Made personal financial donations to campus programs	<input type="checkbox"/> YES	_____
Served in an advisory capacity to campus programs	<input type="checkbox"/> YES	_____
Something else?	<input type="checkbox"/> YES	_____
(SPECIFY): _____		

Q2. In the past 12 months, have you volunteered your time (without pay) to any of the following community service programs or activities? ***Please check "YES" for each applicable activity below.***

Q2a. For each activity checked "YES", please indicate approximately how many hours you devoted each month, on average?

	<input type="checkbox"/> YES	<u># of Hours</u>
Meals on Wheels	<input type="checkbox"/> YES	_____
Big Brothers / Big Sisters	<input type="checkbox"/> YES	_____
Foster Grandparents	<input type="checkbox"/> YES	_____
Peace Corps	<input type="checkbox"/> YES	_____
AmeriCorps	<input type="checkbox"/> YES	_____
Tutoring students	<input type="checkbox"/> YES	_____
Food Bank / Food Pantry	<input type="checkbox"/> YES	_____
Mentoring another person	<input type="checkbox"/> YES	_____
Hospital / Hospice	<input type="checkbox"/> YES	_____
Disaster Relief / Assistance	<input type="checkbox"/> YES	_____
School Aide / Crossing Guard	<input type="checkbox"/> YES	_____
Church, synagogue, or mosque	<input type="checkbox"/> YES	_____
Library / Literacy programs	<input type="checkbox"/> YES	_____
Animal adoption / assistance	<input type="checkbox"/> YES	_____
Gang intervention	<input type="checkbox"/> YES	_____
Neighborhood / Civic involvement	<input type="checkbox"/> YES	_____
Something else?	<input type="checkbox"/> YES	_____
(SPECIFY): _____		

Q3. Even though you are retired from the university, are you ***currently*** working for pay? (***Check only one response.***)

- Yes, self-employed
- Yes, working fulltime for an employer (including UC)
- Yes, working part-time for an employer (including UC)
- Not currently working for pay <SKIP TO Q5>

Q4. What kind of work do you do, exactly? What kind of business or industry is that?

\_\_\_\_\_ / \_\_\_\_\_  
JOB
INDUSTRY



# UCLA RETIREES' ASSOCIATION MEMBERSHIP SURVEY

In our continuing effort to make the UCLA Retirees' Association (UCLARA) relevant to our members and campus, the Board is conducting our first ever membership survey. Your answers to the following questions will guide our future planning as we strive to create programs and activities that best address your needs and interests as well as those of UCLA.

Please take part in planning for the future of UCLARA by completing and returning this survey. We have enclosed a stamped, self-addressed envelope for your convenience.

Thank you,  
UCLARA Board of Directors

## UCLARA MEMBERSHIP EXPERIENCE

1. How long have you been a UCLARA member?

- < 12 mos    1-3 yrs    3-5 yrs    > 5 yrs

2. Why did you become a member? (Check all that apply)

- Continue and renew friendships  
 Meet new people  
 Maintain a connection to campus life  
 Attend educational programs  
 Attend social events  
 Participate in volunteer activities  
 Advocate for University retirees  
 Receive the Newsletter  
 Other (please specify)
- 

3. Have you used the UCLARA website? (<http://www.errc.ucla.edu/st/index-st.html>)

- Yes    No

If yes, did you find the website useful and informative?

- Very    Somewhat    Neutral    Not really

Suggestions for improvement \_\_\_\_\_

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4. Overall, how satisfied are you with your membership?

- Very Satisfied    Satisfied    Neutral    Dissatisfied    Very Dissatisfied

5. How likely are you to encourage others to join UCLARA?

- Very likely    Likely    Neutral    Unlikely    Very unlikely

## EVENT INFORMATION

6. How do you usually learn of UCLARA's programs and events?

Newsletter    Flyer    Website    Another member    Email

Other (please specify) \_\_\_\_\_

7. What is your preferred method of receiving/reading information about UCLARA's programs and events?

Newsletter    Flyer    Website    Another member    Email

Other (please specify) \_\_\_\_\_

8. How often do you read/review information sent to you about UCLARA programs and activities?

Always    Usually    Sometimes    Never

9. Have you attended UCLARA programs or events in the past year?

Yes    No   If yes, how many? \_\_\_\_\_

What was your favorite and why? \_\_\_\_\_

10. Please rank what is most important in attending an event. Use numbers from 1 to 6, with 1 being most important. You may repeat a number if two or more items are of equal importance to you.

\_\_\_\_\_ Interest in topic  
\_\_\_\_\_ Interest in speaker  
\_\_\_\_\_ Timing of event  
\_\_\_\_\_ Convenience of event location  
\_\_\_\_\_ Cost of the event  
\_\_\_\_\_ Other (please specify) \_\_\_\_\_

11. What day(s) would you prefer to attend an event? (Check all that apply)

Sunday    Monday    Tuesday    Wednesday    Thursday

Friday    Saturday    No preference

12. What time(s) of day would you prefer to attend an event? (Check all that apply)

Morning    Afternoon    Evening    No preference

13. Does an event held on campus discourage you from attending, possibly due to the commuting distance or the cost of parking on campus?

Yes    Distance is a factor    Cost of parking is a factor    No

14. Would you like UCLARA to offer more multi-day trips (e.g., Grand Canyon, Yosemite)?

- Yes     No     No preference

15. Please provide your suggestions for future programs and events.

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## REGIONAL GROUPS

16. Some members who live a distance from the UCLA campus have suggested that satellite UCLARA groups be established in regions closer to their homes. Regional coordinators would focus committees, activities, and programs in those regions. Would you participate in more UCLARA activities if there were a group in your region?

- Yes     No     Not applicable

If yes, in which region?

- Ventura  
 San Fernando Valley/Simi  
 Santa Clarita Valley  
 Inland Empire  
 Palm Springs  
 South Bay  
 Other (please specify) \_\_\_\_\_
- 

## CAMPUS and COMMUNITY INVOLVEMENT

Our members have many diverse skills and broad experience, both from a career standpoint and personal interest, and we are aware that many are currently involved in interesting volunteer activities both on campus and in the community.

17. Are you currently involved in volunteer activities on campus or in the community?

- Yes     No

If yes, please specify \_\_\_\_\_

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18. Please indicate your interests or experience below. Additionally, which of these would you be willing to share with others in discussions or lead as workshops for UCLARA, UCLA-related groups, or other community groups?

Interests/Experience	Share/Lead
<input type="checkbox"/> Administrative	<input type="checkbox"/>
<input type="checkbox"/> Arts and crafts	<input type="checkbox"/>
<input type="checkbox"/> Biking.	<input type="checkbox"/>
<input type="checkbox"/> Camping	<input type="checkbox"/>
<input type="checkbox"/> Civic affairs	<input type="checkbox"/>
<input type="checkbox"/> Computer/Internet	<input type="checkbox"/>
<input type="checkbox"/> Exercise/walking/yoga	<input type="checkbox"/>
<input type="checkbox"/> Financial/budgetary	<input type="checkbox"/>
<input type="checkbox"/> Foreign language	<input type="checkbox"/>
<input type="checkbox"/> Music/art	<input type="checkbox"/>
<input type="checkbox"/> UCLA/professional athletics	<input type="checkbox"/>
<input type="checkbox"/> Volunteer activities	<input type="checkbox"/>
<input type="checkbox"/> Writing/editorial	<input type="checkbox"/>

Others (please specify)

	<input type="checkbox"/>
	<input type="checkbox"/>

There are many ways to become involved in UCLARA. For the following two questions (19 and 20), please check the appropriate boxes and spaces **only** if you would like to participate in one or more of our activities, and then fill in the necessary contact information on the next page.

19. I would like to increase my involvement and serve UCLARA

- As an elected or appointed officer and Board member
- As a Committee chairperson
- As a Committee member
  - Campus and Community Relations
  - Interest Groups
  - Membership
  - Newsletter
  - Programs
  - Volunteering
  - Website

20. UCLARA has had requests for speakers to present at various campus and community events. Would you be interested in being included on such a list?

- Yes       No

If yes, what topic(s) would you like to present? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## PERSONAL INFORMATION (Optional)

UCLARA would appreciate receiving as much of the following information as possible to enable us to update our records and/or contact you with questions regarding your answers to the survey.

Preferred title: Mr. Mrs. Miss Ms. Dr. Other \_\_\_\_\_

Last name: \_\_\_\_\_

First name: \_\_\_\_\_

Address 1: \_\_\_\_\_

Address 2: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Country (if other than U.S.) \_\_\_\_\_

Email address: \_\_\_\_\_

Home phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_

Retirement date: \_\_\_\_\_

Campus department(s) \_\_\_\_\_

Working title(s): \_\_\_\_\_

Total years of service \_\_\_\_\_

**THANK YOU FOR HELPING US PLAN FOR THE FUTURE OF UCLARA**

**(Please return the completed survey in the enclosed postage-paid envelope as soon as possible, preferably by July 10, 2012.)**