

**Report on the CUCRA and CUCRA/CUCEA Meetings
Held at Santa Cruz on October 31 and November 1, 2012**

CUCRA Meeting

Marian Gade thanked Santa Cruz for hosting the meeting. Marian has served as chair of CUCRA for five years rather than the usual four years due to some term readjustments of officers. Lee Duffus (Santa Cruz) will be the new chair starting January 1, 2013.

CUCRA's Accomplishments and Concerns

Marian Gade outlined some of the accomplishments while she has been chair, including: post-employment and retiree benefits, participation in AROHE, sharing information on the WEB, electronic distribution of information, influence on policies that affect retirees, and revision of the CUCRA Bylaws and Standing Orders. Concerns remain regarding retiree health benefits, retirement fund investments and assurance of the continuation of UC staff services rather than outsourcing retiree services.

Treasurer's

CUCRA continues to receive funds from the CUCRA travel group. This year, \$5,200 was received and CUCRA is considering paying the host campus for some of the CUCRA meeting expenses.

Joint Benefits Committee (JBC) Report

Adrian Harris highlighted the committee Report (copy attached) which expresses concern over the lack of notification by Fidelity when the minimum requirement distribution must be taken and the requirement that 10% be withheld for federal taxes. He believes that Fidelity Corporate Policies are unacceptable regarding this matter.

Reference was made to the upcoming health plan changes, copay costs are one third to one half more for some plans.

Concern was expressed over the proposed UC Benefits Center at Riverside (RATH) which will provide health and welfare administrative services for all UC retirees. A particular issue is whether the health care facilitator position will be continued at the campuses. The JBC is looking into this matter.

AROHE Conference

Deanna Falge Pritchard and Lee Duffus reported on the AROHE Conference. Lee Duffus' report is attached and my report was distributed previously.

Travel Group

The following trips are being offered in 2013 by Collette Vacations:

Patagonia: The Miracle of Argentina & Chile – March 7-22

Heritage of America – April 19-2

Alaska Discovery Land & Cruise – July 9-21

Italian Vistas – November 2-14

For more information contact Collette Vacations 877-872-4331

Retiree Centers and Association Reports

Retiree Center directors reported on their activities and those reports along with the association reports are available for review at the CUCRA Website: cucra.ucsd.edu.

Retirement Counseling

Joe Lewis from the Office of the President indicated that they will help UC locations with retirement counseling. With the introduction of the new pension tier plans, campuses are asking for their help. The on line system is being upgraded so people will be able to complete the retirement process on line.

CUCRA/CUCEA Meeting

Welcome and Highlights of the Marine Sciences Institute

Nancy Pascal, President of the Santa Cruz Retiree Association introduced Chancellor Blumenthal, an astrophysicist who has been at Santa Cruz since 1972. He thanked the group for their continuing engagement and gave a few highlights of the academic achievements of the campus particularly with regard to undergraduate education, personalizing cancer treatment and the international impact of UCSC's research. Chancellor Blumenthal introduced Gary Griggs, Director of the Institute of Marine Science and Professor of Ocean Science/Marine Science, who spoke about the work and accomplishment of the Institute.

The Master Plan called for the Marine Science Institute which includes locations at Monterey, Moss Landing and Santa Cruz. From ocean drilling much is learned about what happened in the past. By tagging elephant seals they have information on the depths the seals dive and water temperature. California is the largest coastal economy (\$45.7 billion) and coastal sustainability is vitality important.

AROHE Report- Best Sustainable Practices

Sue Barnes and others who attended the AROHE conference presented information about some of the best practices of Retiree Organizations. See attached write up.

Office of the President

Insurance for Associations – Cheryl Lloyd, Office of Risk Services, presented information about Liability Insurance Coverage for the associations. Mary Tumagalli of Marsh Campus Connections went through the details of coverage, how to register an event and the importance of a certificate of coverage. Events that are beyond the usual activities (e.g. regular meetings) are the ones that need to be registered. A separate form must be completed for each event.

Health Care Task Force – Michael Bastista, Executive Director, said that 80% of retiree health premium cost is funded by the University and that will gradually decrease to 70%. For retirees with Medicare, premiums have decreased with the exception of High Option Plan.

Health Care Benefits Work Group (HCBWG) – When asked about retiree representation on HCBWG Michael Batista said that there are no retirees on it; however, Professor Saul Schaefer MD and Robert May from Davis and the Academic Senate representative might be potential points of contact. The HCBWG has agreed that if needed for cost savings, areas to be considered include: plan design, UC Medical Center discounts/support, step reductions of UC contributions toward employees, reduction in the eligibility of part time employees and decrease UC contributions for dependents.

Retirement Savings Funds - In January there will be an announcement about a decrease in the number of sponsored funds from over 200 to 86 with the lowest fees using Fidelity, Calvert and UC.

Open Enrollment – Michael Walden talked about open enrollment. With regard to family eligibility, 6700-6800 people were dropped from coverage, saving about \$35 million. The study cost \$1 million. Verification will now be on an ongoing basis.

CUCRA Next Meeting - UC Riverside, April 24 & 25, 2013

Deanna Falge Pritchard, Representative and
Barbara Nichols, Alternate Representative to CUCRA