

THE UC DAVIS RETIREE CENTER: A PROPOSAL

The UC Davis Emeriti Association (UCDEA) and the UC Davis Retirees' Association (UCDRA) propose establishing a retiree center on the Davis campus. Specifically, we request an allocation of designated space for such a center and budgetary support for center office equipment and staffing. The center would serve all UC Davis annuitants and each of our two organizations. The University Club, an organization whose members are mostly emeriti or staff retirees, would also utilize center resources, and it joins in supporting this proposal.

Participating Organizations

Campus emeriti and staff retirees each have an organization that is governed by a board of directors. Each organization publishes its own newsletter, maintains its own website, holds general membership meetings, sponsors events (sometimes jointly), and engages in a variety of activities. They both rely on membership dues, the voluntary effort of their members, and support from the university. Together, they have a potential clientele of approximately 6000, (excluding out-of-area annuitants, but including an estimate of annuitant spouse/partners and survivor beneficiaries).

The UCDEA sponsors a luncheon/speaker series during the academic year for members of both organizations. It has a program to videotape informative interviews with emeriti who played a pivotal role in the history of the campus, with much of the funding and the space for the project provided by the chancellor's office. This program was instrumental—along with UCDRA—in the production and funding of *Abundant Harvest: A History of the University of California, Davis*. The UCDEA and UCDRA jointly promoted the establishment of the Health Care Facilitator Program on this campus and at UC generally. The UCDEA receives assistance from a member of the Academic Senate's secretarial staff. She provides arrangements for executive board and general meetings, and to the extent permitted by her other responsibilities, she attends and prepares minutes of these meetings, and is generally available to provide staff assistance to the organization. A room is provided to the UCDEA in the basement of the Mrak Hall. While some UCDEA and UCDRA organizational files are stored there, it is specifically designated for the Video Records (oral history) project, and is used to tape and edit interviews conducted in the connection with that project. The edited tapes are eventually stored and available for viewing in the special collections unit of the main library, and many have been aired locally on (Davis Community TV) Channel 15. The UCDEA has a current membership of approximately 180.

The UCDRA receives minimal financial support from the Office of Associate Vice Chancellor-Human Resources (HR) to cover expenses associated with its newsletter, general meetings, and participation in the UC's statewide retiree organization meetings. HR staff reserves university facilities and parking spaces as well as arranges refreshments for UCDRA meetings. With the assistance of HR staff, a new brochure was prepared and sent to retirees, resulting in a significant increase in members. UCDRA membership now approaches 500.

Implementation of this proposal would obviate the need for the staff assistance currently provided to UCDEA and UCORA. Similarly, assuming the designation of secure and comparable space at the proposed retiree center, UCDEA's currently designated Mrak Hall space would be relinquished.

The University Club currently has 200 members, 180 of whom are retired faculty and staff. It has a long history on this campus, sponsors the Fall Wine Festival, Easter and Mother's Day brunches, and serves an important social function for members of the campus community. When the University Club, as an organization, transferred the University Club facility to the campus, the campus agreed to provide the organization with office space. In addition, it has provided free access to their former facility or other campus facilities to hold six social events each year.

Center Justification

Establishment of a campus retiree center would more fully serve the needs and interests of the growing UC Davis annuitant population by providing a central facility organized and staffed for this purpose. It would strengthen the connection between UC Davis retirees and the university; permit an enhancement of the services and activities currently provided by the two participating organizations; benefit from economies of scale and reduce the duplication of effort by those organizations; reduce the workload of campus units currently trying to meet the needs of retirees; and facilitate participation in campus life by retirees, many of whom continue to serve the university by teaching, doing research, and providing service to the campus, UC, their professional associations, and the general community.

Other UC campuses have already created and staffed retiree centers, e.g., UCLA's, established in 1969, and UC San Diego's and UC Berkeley's more recently. According to an October survey conducted by the Council of University of California Emeriti Associations, the services provided by these centers have increased and organizational memberships have grown the longer they have been in existence and the more staff time has been allotted to them. Indeed, the level of services and activities provided by the existing UC retiree centers is considerably greater at their respective campuses than is provided at UC Davis. Further, the enhanced level of services and activities has resulted in the percentage of eligible emeriti and retirees who are actually members of the relevant organizations being considerably greater on these campuses.

Center Functions

The proposed center would be the central focal point for coordinating the activities of UC Davis retirees. It would:

- Provide information and/or referrals for emeriti and staff retirees on such matters as health services, long-term care insurance, taxes, estate and financial planning, and retirement housing.
- Interface with the campus Health Care Facilitator Program and other HR offices such as the Academic and Staff Assistance Program.

- Serve as the gateway to other retiree services available at UC Davis and the UC Office of the President, and cooperate with campus and UC units presently trying to meet the needs of retirees in order to reduce the workload of those units and to more effectively reach members of the retiree community.
- Provide a central place from which efficiently to plan and organize such current organizational activities as the aforementioned luncheon/speaker series, University Club social functions, production of newsletters (perhaps henceforth to be published jointly rather than independently by UCDEA and UC DRA), and the video records/oral history project.
- Introduce such new activities for retirees as group trips, tours, and outings; fitness or other classes; etc.
- Work with the Office of Human Resources and other campus units to explore ways by which retirees can enrich and contribute to campus life and better serve as advocates for the university and its mission.
- Provide pre-retirement informational programs for UC Davis faculty and staff.
- Promote participation and support for other campus organizations where involvement would be mutually beneficial, such as the International House, university art museums, University Extension Lifelong Learning (including Senior Learning Unlimited), the Freshman Seminar Program, and the campus alumni and development offices.
- Provide interface with relevant local agencies, such as the Davis Senior Center, Citizens Who Care, the Yolo County Senior Center, and with the general community.
- Maintain or consider the development of relationships with such statewide or national organizations as the Council of UC Emeriti Associations (CUCEA), the Council of UC Retiree Associations (CUCRA), the newly formed national Association of the Retirement Organizations in Higher Education (AROHE) in which UC Berkeley and UCLA are founding members, and Elderhostel.
- In cooperation with the main library, serve as repository for historical information about retirees, including the videotaped interviews conducted in connection with the oral history project identified above.
- Identify and maintain a record of the continuing research, teaching, and service activities of retirees, and bring these achievements to the attention of the campus administration, active UC employees, and the general UC Davis retirement community.
- Keep membership mailing lists updated, maintain organizational webpages, and arrange for the identification of UC community members approaching retirement.
- Develop patterns of cooperation and coordination between the participating organizations, including through joint memberships, joint board meetings, and joint activities, thereby minimizing duplication of effort and deriving benefit from sharing information from each group's experience.
- Assist the University Club in maintaining and enlarging its membership, collecting dues, and – in cooperation with campus Conference and Events Services – arranging such

traditionally successful events as the Fall Wine Festival, Easter and Mother's Day brunch. Such a cooperative relationship with the University Club would continue at least until the membership of active faculty and staff is large enough to make it feasible to return to being an autonomous organization.

- Serve a social facilitation role for the three participating organizations (operating independently and jointly), through access to a suitably designated area at the new hotel/Conference Center.

Center Site and Staff

The center facility should be located so that it is easily accessible to retirees with near-site parking available for its clientele. It should include a conference room with a seating capacity of 30 or more, and office space to accommodate support staff. Ideally, it would also include an office for the Video Records Project comparable to that currently designated for this purpose in the basement of Mrak Hall.

The Center site should have the potential for expansion as the UC Davis retiree population grows and as experience may warrant. Consideration might be given to eventually including center offices in the new campus hotel/conference facility, where the participating organizations would have access to conference or reception rooms and to dining services on an "as needed" basis. Preliminary discussions with the campus Special Project Director indicate there is an opportunity to incorporate the proposed retiree center into planning for the hotel/conference center. Members of the organizations participating in preparation of this proposal have contemplated a fund-raising drive among retirees to help defray the portion of hotel/conference center building costs that might be assigned to a retiree center.

We propose that the retiree center be staffed by a fulltime director (preferably appointed as a Management and Senior Professional I, as at UC Berkeley) and an administrative assistant. The director's responsibilities would be patterned after those described in Appendix A, (a job description for the Director of the UCLA Emeriti/Retiree Relations Center). Staff support provided by the Academic Senate for UCDEA and by the Human Resources Office for UC DRA would, of course, be relinquished.

Attachment 10: Draft UC Davis Retiree Center Planning Committee

UC Davis Retiree Center Planning Committee

This committee to guide the development of a UC Davis Retiree Center based on the November 16, 2002 proposal (copy enclosed) will be appointed by the Provost.

Justification

The Retiree Center will serve the needs and interests of the growing UC Davis annuitant population by providing a central facility that is organized and staffed. It would strengthen the connection between UC Davis retirees and the university; permit an enhancement of the services and activities currently provided by and to the two organizations; benefit from economies of scale and reduce the duplication of effort by those organizations; reduce workload of campus units currently trying to meet the needs of retirees; facilitate participation in campus life by retirees, many of whom continue to serve the university by teaching, doing research, and providing service to the campus, UC, their professional associations, and the general community. Retiree centers have been established at UC Berkeley, UCLA, and UC San Diego and are successfully achieving the vision proposed for the UC Davis Retirees Center.

Charge to the Committee

The committee will be charged with five tasks to develop the plan for the UC Davis Retiree Center:

Task I – Prepare a mission statement enumerating the Retiree Center’s functions and interrelations with facets of university operations and organizations.

Task II – Establish the operational requirement including staffing, space, and budget necessary for the Retirees Center to achieve its mission.

Task III – Determine the location of the Retirees Center. If necessary, identify interim space until a permanent home is available.

Task IV – Develop a timeline for establishing the Retiree Center, while considering the availability of resources and space.

Task V – Oversee each task until it is completed and recommends an organizational structure necessary to assure long term viability of the Retiree Center.

Composition

The committee will be comprised of:

President and Past President of the UC Davis Emeriti Association – Charles Hess and Ed Costantini

President and Past President of the UC Davis Retirees Association – Barbara Nichols and Anne Gray

President of the University Club – Donald Margolis

Representative to the Association of Retirement Organizations in Higher Education (AROHE) – Deanna Falge Pritchard

Office of the Provost-Assistant Executive Vice Chancellor – Robert Loessberg-Zahl

Human Resources-Associate Vice Chancellor – Dennis Shimek

Special Projects Director – John Yates or designee

Vice Chancellor University Relations – Celeste Rose or designee

Human Resources Benefits Manager – Elizabeth Hansen or designee

Staff Support to the Committee – _____

Reporting

The committee will be chaired by Assistant Executive Vice Chancellor Robert Loessberg-Zahl and will report to the Provost.