Proposal to establish a Retiree Center on the UC Davis Health System campus

Overview

The UC Davis Retiree Center, the UC Davis Emeriti Association (UCDEA) and the UC Davis Retirees’ Association (UCDRA) propose establishing a satellite office of the Retiree Center on the Sacramento campus. Specifically, this proposal asks for a designated physical space and an annual budgetary allocation from the UC Davis Health System dean’s office to support operational costs and staffing for this expansion. The proposed budget is attached as Appendix A.

The Retiree Center, which is located on the Davis campus, is charged with serving approximately 10,000 retirees and their spouses/partners, about 2,000 of whom retired from the health system campus and about 6,800 of whom reside within 35 miles of the Sacramento or Davis campus. Without a physical presence on the Sacramento campus, there is a disparity in the level of engagement among retirees who live locally but east of the Sacramento River. Sacramento retirees rarely become members of the UCDEA or UCDRA and seldom attend retiree events, both key measurements of retiree engagement. During the past several years, attempts to offer programs at the Sacramento campus have met with mixed results. While there has been enthusiasm among Sacramento employees and retirees, the efforts have been hampered because there is not an employee at the health system charged with overseeing the efforts.

The Davis campus has realized great benefits from providing a central point to facilitate a relationship with retired faculty, academics and staff. Retirees are teaching, mentoring, researching, serving on task forces and committees, acting as docents, advocating for the university and otherwise volunteering across the campus. In terms of lifetime philanthropic giving, retired faculty, academics and staff have donated more than $96 million to UC Davis.

Campus leaders have publicly recognized and thanked retired faculty, academics and staff for their generous contributions of “The Three T’s—Time, Treasure and Talent,” with UC Davis being the great beneficiary. As campus leaders have recognized, and as the Retiree Center on the Davis campus has demonstrated, a minimal investment to provide programs and services to retired faculty, academics and staff pays off in great dividends. It is anticipated that an expansion to the Sacramento campus will increase the likelihood that Sacramento-area retired faculty, academics and staff will be more engaged in health system volunteer efforts, more likely to donate to the university and more likely to maintain a lifelong relationship with the university.
The retiree population

Today’s U.S. retirees are the healthiest, best educated and longest-living older adults in the country's history. The baby boom generation (78 million people born in the U.S. between 1946 and 1964) have begun to retire, with about 8,000 people leaving active employment in the United States every day. As the chart below shows, the number of U.S. retirees will continue to increase rapidly in the coming years.

The growing contingent of UC Davis retirees mirrors the national trend. Approximately 700 faculty and staff retired in 2014, a 30% increase over the number who retired just five years prior. While the Retiree Center offers service to retirees residing around the world, the affinity of the constituency to remain in the vicinity affords the university an opportunity to connect them to the campus in meaningful ways.

Many faculty and staff retire with a desire to stay engaged with the university, making them a valuable resource. Surveys of UC Davis emeriti and staff conducted in 2012 and 2013 showed that a significant percentage of the respondents are involved on the campus and in their communities:

- Emeriti survey results for the years 2009 - 2012:
  - 57% taught; 38% for UC Davis
  - 44% mentored students
  - 56% received extramural funding
  - 15% published books or articles

- Retired staff survey results for the years 2010-2013:
  - 53% volunteered in the community
  - 22% volunteered on campus
  - 22% worked in paid positions

From a philanthropic standpoint, providing “touch points” for retired faculty, academics and staff can be profoundly beneficial. Academic retirees are an incredibly loyal population—many have spent 20, 30, 40 or even more years at the university and continue to care very much about its well-being. According to statistics kept by the UC Davis Development and Alumni Relations Office, retired faculty, academics and staff donated the following totals to UC Davis in recent years:

- 2001 – 2005: $21.6 million ($2.3 million to the health system)
- 2006 – 2010: $20.3 million ($3.0 million to the health system)
- 2011- 2014: $26.2 million ($4.4 million to the health system)

The Retiree Center has played an important role in developing a culture of philanthropy among this population. With a modest investment to expand Retiree Center programs to Sacramento, we think that there is potential for significantly increasing retiree philanthropic support.
The Retiree Center

Nationally, the establishment of university-funded retiree centers is beginning to be recognized as a win-win investment. The University of California is a leader in the movement, with UC Davis joining four other UC campuses with retiree centers that are staffed with full-time employees. Two additional UC campuses fund centers with part-time staff. UC retiree center directors provide significant leadership in the Association of Retirement Organizations in Higher Education (AROHE), a national organization that encourages institutions to develop programs to engage and honor its retired faculty, academics and staff. With a tagline of “Transforming Retirement,” AROHE is working closely with the American Council on Education to develop and showcase successful practices in the culminating stages of an academic career. One of those best practices is the establishment of campus-funded retiree centers.

A 2012 survey of 106 retiree organizations across North America showed significant differences for campuses with campus-funded retiree centers versus those with retiree organizations but no centers. In the survey’s conclusions, Professor Emeritus Roger Anderson from the University of Minnesota observed, among other things:

- Centers are more than two times as likely as non-center retiree organizations to declare their purposes to include service (both community and university) and teaching.
- A retiree center can assist in bringing retiree resources (human, social, and intellectual capital) to bear upon the mission of universities to achieve excellence in teaching, service and research.

The complete survey analysis is attached as Appendix B.

The UC Davis Retiree Center promotes a campus culture that recognizes, encourages and values the continuing contributions to the university by retired faculty, academics and staff. Since its inception in 2006, the Center has built a robust array of programs to serve retirees and facilitate their connection to UC Davis. The Center, in partnership with the UCDEA and UCDRA, offers services/programs in four primary areas:

1) The connecting link
   a. Includes retirees in daily campus life
   b. Connects retirees to volunteer opportunities
   c. Facilitates retiree contributions to the campus, both financial and non-financial

2) Administrative services for retirees
   a. Serves as retiree office of record
   b. Communicates regularly with retirees

3) Retiree support programs
   a. In partnership with the office of the Vice Provost - Academic Affairs, offers annual Transitioning to Retirement classes for employees considering retirement; classes have been offered on the Davis campus since 2012 and this year will be offered on the Sacramento campus in response to demand from health system employees
   b. Provides support and resources for dealing with loss, financial and caregiving issues, etc.

4) Events
   a. Offers educational and social programs
   b. Plans tours of campus venues and day trips to regional destinations
   c. Sponsors new retirees events, including a new retiree reception and a retiree resource fair

The net effect of these offerings is a community of retirees who still feel a significant connection to the university. For more detailed information on Retiree Center activities and services, see the attached business plan for 2015 – 2016, Appendix C, and the Retiree Center calendar, Appendix D.
The UCDEA and the UCDRA

Like the Cal Aggie Alumni Association, the UCDEA and the UCDRA are all-volunteer organizations that are independent but officially recognized affiliates of the University of California. The Retiree Center provides administrative assistance to the UCDEA and the UCDRA to support their efforts to represent retiree interests and provide service to UC Davis.

In addition to their jointly-sponsored “BrainFood Talk” educational programs and social events, each organization coordinates its own service project to benefit the campus.

The UCDEA coordinates the Video Records Project which captures a unique oral history of the campus by producing DVD interviews of emeriti and campus administrators. The project, begun in the late 1980s, has completed more than 400 interviews to date. Efforts are underway to make the interviews available on YouTube.

The UCDRA sponsors a Career Enhancement Award, fundraising for an endowment fund that awards one or more annual scholarships to staff persons who are furthering their education while employed at the university.

The UCDEA and UCDRA play an important advocacy role on behalf of retirees at both the local and state levels and they encourage their members to give back to the university in a variety of ways. They are valuable partners in harnessing the energy and talents of retired faculty, academics and staff.
Proposal details

The UC Davis Retiree Center, the UCDEA and the UCDRA propose that the UC Davis Health System dean’s office provide start-up funds and contribute ongoing funding so that the Retiree Center can expand services and establish a physical presence on the Sacramento campus.

Staffing

We propose that the Sacramento branch of the Retiree Center be staffed by a part-time (43% to 49%) program manager, preferably at the Analyst II level, who could work three days per week from 9 a.m. – 4 p.m. or some similar schedule. Initially, this person may be a rehired retiree from the health system. This offers the advantage of an experienced person who already knows key health system faculty and staff and who understands health system policies and procedures. Since rehired retiree appointments are of a limited duration, this would also allow for evaluation after year two, at which point a permanent staffing plan could be devised and a career program manager could be recruited.

We propose that the program manager report to the Retiree Center director who is located on the Davis campus. The program manager would work collaboratively with Sacramento campus staff, primarily in the dean’s office and the development office. A draft job description is attached as Appendix E.

Advisory Committee

We propose that an advisory committee be formed to help shape the development of the new Center’s focus and activities. The committee could include emeriti, retired staff, a liaison from the health system dean’s office, a liaison from the health system’s development office, Retiree Center staff and other members as deemed beneficial. The advisory committee would meet regularly during the start-up phase of the satellite Center and continue in an advisory capacity as needed. This model was used very successfully during the start-up and development years for the Davis campus Retiree Center.

A core group of health system emeriti have already formed a task force to discuss ways the Sacramento campus can better connect with its retirees. This group strongly encourages the health system to fund a satellite office of the Retiree Center on the Sacramento campus and some of them may wish to be a part of an ongoing advisory committee. The task force members are:

- John Vohs, professor emeritus of communications, UC Davis, and past UCDEA president (task force chair)
- Jo Anne Boorkman, UC Davis Health System librarian emerita and incoming UCDEA president
- Robert Chason, chief operations officer emeritus, UC Davis Health System
- Bill McGowan, chief financial officer emeritus, UC Davis Health System
- Joe Silva, dean emeritus, UC Davis School of Medicine
- Joseph Tupin, physician emeritus, UC Davis Health System Department of Psychiatry and Behavioral Sciences
- Gibbe Parsons, physician emeritus, UC Davis Health System Pulmonary and Critical Care Department

Program

The Sacramento campus Retiree Center, like the Davis campus Retiree Center, would have the primary mission of keeping retirees connected to the campus. Like the staff on the Davis campus, the program manager would plan retiree events, work to develop Sacramento branches of the UCDEA and the UCDRA, provide resources and referral information to retirees, connect retirees with volunteer opportunities and partner with health system departments to engage retirees in campus life.
Major programs would include an annual new retirees' reception, quarterly social or educational programs (at a minimum) and an annual “Transitioning to Retirement” class series for employees nearing retirement. The program manager would partner with other departments on campus to include retirees in existing programs and events wherever appropriate, and would collaborate with the development office on fundraising initiatives. A business plan would be developed annually to outline program and service goals.

**Space**

The Center would not need a large space. It would require an office (at least 120 square feet), a shared reception area, storage space (a walk-in closet or similar, at least 50 square feet) and access to one or more meeting rooms. The physical space would serve as a workplace for a program manager, office space for Fidelity Retirement Services, the Health Care Facilitator or other UC department representatives to consult with retirees and a meeting space for retiree advisory committees, task forces and work groups.

The Center would ideally be located in a central, easily accessible building with near-site parking. Knowing that space at the health system is impacted, we realize that the ideal space may not be available immediately. If an appropriate permanent space is not available now, then we propose identifying a temporary location that would allow the Center to begin operating until a permanent space is identified.

**Budget**

We are requesting modest start-up funds of $6,500 to purchase computer and other equipment and supplies. This budget assumes that the Center would have access to some shared equipment such as a copier and scanner. In addition to start-up funds, we are requesting $43,500 in operating funds for the 2016 – 2017 academic year. The operating budget would cover the costs of the part-time program manager, office supplies and expenses and events such as the new retirees' reception and the Transitioning to Retirement class series. It is anticipated that the budget for year two would be slightly higher to reflect cost-of-living increases. The budget may increase more in year three depending upon the permanent staffing model that is chosen.

**Timeline**

We are requesting funding for the new Center to begin with the 2016 – 2017 academic year and continue for two years as a pilot program with a contract program manager. At the end of year two, a program evaluation can be conducted to develop a long-range staffing plan for the Center.

Once the budget is approved and space is allocated, the Retiree Center director could move quickly in the summer of 2016 to establish the advisory committee and recruit the program manager. With the model of programs already successfully in place at the Davis campus Retiree Center, it is anticipated that activities could begin with a kick-off event in the fall of 2016 or winter of 2017.

Respectfully submitted,

Sue Barnes
Director, UC Davis Retiree Center
slbarnes@ucdavis.edu

Dave Shelby
President, UCDRA
drshelby@ucdavis.edu

Lyn Lofland
President, UCDEA
llofland@ucdavis.edu