The year in review

The Retiree Center was poised for dynamic change and growth during fiscal year 2008-09, as start-up efforts during the first two years of operations evolved into a more developed and focused program. At the beginning of the year, the Center underwent an unexpected change with the departure of the first program coordinator in July 2008.

In spite of the temporary staff shortage, Center activities did not diminish. The program assistant, under the direction of an interim coordinator and aided by a cadre of volunteers, implemented all of the planned activities for nearly eight months, including several new initiatives.

The new program manager took the helm in February 2009, and the expansion movement continued. The entire year was brimming with endeavors designed to improve and enhance activities and services for UC Davis retirees, including:

**New activities:**
- Oktoberfest
- Tennis Festival
- “Healthy ‘til 100” Wellness Challenge
- Older Americans Month Speaker Series
- New Retirees Reception
- Day Trips

**Continuing activities:**
- Open House (in conjunction with Convocation)
- Football Tailgate Party
- Basketball Tailgate Party
- Wine Tasting
- Picnic Day Parade and Open House
- Steak Bake

**New initiatives:**
- Enhanced Communication and Outreach
- Increased Office Efficiency
- Expanded Volunteer Program
- New and Continuing Collaborative Partnerships
Retiree Center
The UC Davis Retiree Center serves as an official link between retirees and the university, and it sponsors programs that encourage retirees to continue a strong connection with the campus. We provide the following services to retirees and employees preparing for retirement at the UC Davis and UC Davis Health System locations:

- Social and educational programs for retirees
- Support for the work of the Emeriti and Retirees’ Associations
- Connections between retirees and campus volunteer opportunities
- Information and referrals for retirees
- Connections to pre-retirement planning resources for current employees

The Retiree Center is staffed by two full-time UC Davis employees: a program manager and a program assistant. Additionally, the Center is supported by numerous volunteer retirees, who assist with event planning, administrative tasks, special projects, and committee work.

Mission
The UC Davis Retiree Center’s primary mission is to help our retired faculty and staff to continue a strong connection to the university. The Center facilitates a role for retirees in the campus community and enhances the quality of life in retirement by providing access to professional resources specific to the needs of retirees. We achieve our mission by supporting the work of the Emeriti and Retirees’ Associations and by providing programs and services that support retirees at the UC Davis and UC Davis Health Systems locations and contribute to the continued well-being and creativity of all retired faculty, staff, and their families.

History
A dedicated group of retirees, staff, and university administrators worked diligently between the years of 2001 and 2006 to develop and implement the concept of the UC Davis Retiree Center. The efforts began in 2001, when the Council of University of California Emeriti Associations (CUCEA) launched an initiative to increase the number of UC campuses with retiree centers.

In 2002, the UC Davis Retiree Association (UCDRA) followed up by drafting a proposal to establish a retiree center at UC Davis, and the UC Davis Emeriti Association (UCDEA) joined the movement. A planning committee was formed, and that committee drafted an organizational plan and presented it to campus administrators.

After several more years of dedicated efforts, the UC Davis Retiree Center finally became a reality in June 2006 with the allocation of a preliminary budget and the appointment of the Center’s first coordinator.
Retiree Center Advisory Committee
The Retiree Center is guided in its work by the Retiree Center Advisory Committee. The committee meets monthly to provide counsel to the Center staff, advising on issues such as program, budget, collaborative efforts, and program offerings.

The committee includes campus administrators as well as retirees, and plays an integral role in the Center’s operations. By bringing together stakeholders from across the Davis and Sacramento campuses, the Center is able to reach consensus and garner ideas to better meet the varied needs of all retirees. The committee works in a very positive and collaborative spirit.

The committee is composed of 10 members: 3 members of the UC Davis Emeriti Association (president, past-president and member-at-large), 3 members of the UC Davis Retirees’ Association (president, past-president and member-at-large), a representative from each of the Human Resources Departments at UC Davis and the health system, a representative from the Offices of the Chancellor and Provost, and a retired member-at-large who does not belong to either association.

Retiree Center 2008/09 Advisory Committee
Alex McCalla   Chair; UCDEA President
Calvin Handy   Vice-Chair; Member-at-Large
Charley Hess   UCDEA Past-President
Dick Walters   UCDEA Member-at-Large
Gary Schultz   UCDRA President
Bob Halferty   UCDRA Past-President
Deanna Falge Pritchard   UCDRA Member-at-Large
Anne Gray   UCDRA Member-at-Large Alternate
Robert Loessberg-Zahl   Assistant Executive Vice Chancellor
John Peklar   Health System Benefits Manager
Bill Brooks   UC Davis Benefits Manager
Sue Barnes   Retiree Center Program Manager
Marjorie Ahl   Retiree Center Program Assistant
As the Retiree Center continues to define our operations, we rely on input from our constituency to mold our programs. Based on feedback from the advisory committee, the associations, and retirees at large, the Center offered several new programs during this year. Even though the Center operates on a very modest budget, we have been able to leverage our resources and expand programs by structuring most social programs and trips to be participant-funded.

**Oktoberfest**  
*(Saturday, October 10, 2008)*

During a lively evening of German food, beverage and entertainment, internationally-respected UC Davis beer professor, Dr. Charlie Bamforth, regaled participants with hilarious anecdotes and facts from the world of brewing, interspersed with expert-led tasting of a selection of remarkable and very different beers. Guests snacked on bratwurst, German salads, bread and cheese, dessert and beverages, and the “Alpentanzer” troupe demonstrated choreographed German dances. Originally planned as a component of the campus’ Centennial celebration, the enthusiastic response from attendees encouraged us to plan a second annual Oktoberfest for fall quarter 2009.

**The Harley English Tennis Festival**  
*(Saturday/Sunday, October 11-12, 2008)*

Another event that began as a part of the Centennial celebration, the Harley English Tennis Festival welcomed men’s, women’s, and mixed doubles teams ages 50 and up from the campus and community-at-large. Professor Emeritus Harley English, 97, who served as the Honorary Director of the tournament, was widely referred to as the ‘dean’ of retired UC Davis faculty and staff tennis players. Harley and his family were extremely appreciative that this festival was planned in his honor. Participants were universally positive about the event, and the Center plans to repeat it annually.

**“Healthy ‘til 100” Wellness Challenge**  
*(May 1 – August 15, 2009)*

In an effort to emphasize that the lifestyle choices one makes today can have a lasting impact on one’s vitality into retirement and beyond, the Retiree Center launched a “Healthy ‘til 100” Wellness Challenge in May. The challenge was originally conceived to correspond to the centennial theme on campus this year. The challenge was open to current as well as retired employees, who committed to adopting one new healthy habit for 100 days. The Center provided a list of 100 healthy habits for inspiration, spanning six areas of health: physical, emotional, environmental, social, spiritual,
and intellectual. As an added incentive, one person who successfully completed the challenge by August 15, 2009, won two quarter passes to the ARC (Activities and Recreation Center) and two “Fit for Life” or “Group X” fitness class passes. The Wellness Challenge was very well-received across campus, and the Center has plans to repeat it annually. The other UC Retiree Centers’ directors have expressed interest in joining the effort to make this a multi-campus challenge in 2009/2010.

Older Americans Month Speaker Series
(Fridays in May 2009)

Held during Older Americans Month in May, the “Healthy ‘til 100” speaker series provided information about increasing one’s “health-span.” The speaker series was open to current as well as retired employees. The talks were geared toward those concerned about their own health in the years ahead, as well as those caring for an aging loved one. Specific topics were:

- The Emotions of Aging (May 1)
- Nutrition, Exercise and Aging (May 8)
- Cognitive Aging: Use it or Lose it (May 15)
- Universal Home Design (May 22)

The speaker series was well-attended, with 40-50 people in the audience at most talks. Attendees were a fairly even mix of current and retired employees, and included both staff and faculty. The Center plans to sponsor this speaker series annually, and will expand to include talks at the health system campus in 2010.

Day Trips

In response to ongoing requests by retirees, the Center began researching the potential for offering participant-funded day trips. Center staff started with a small trip to tour the national demonstration home at Eskaton Village in Roseville, which included a stop for lunch after the tour. We received positive feedback from attendees.

Staff then explored a potential trip to the Tutankhamen exhibit at the de Young Museum in San Francisco, and conducted an e-mail survey to gauge interest among retirees. The interest was overwhelming, so two different 54-person trips were planned, one on Thursday, December 3, 2009, and another on February 3, 2010.

As a result of high demand for day trips, the Center has formed a Day Trip Committee, comprised of retirees who love to travel. This committee will make recommendations and conduct research on potential trips, and will assist Center staff with planning and implementing tours.
Football Tailgate Party  
**(Saturday, November 8, 2008)**
Causeway Classic, against the Sacramento State Hornets

Retired Aggie fans gathered prior to this annual football rivalry at the Center’s pre-game tailgate party, featuring complimentary refreshments under a tent outside the stadium. The Center reserved group tickets so retirees could congregate together in the stadium during the game. In the future, we plan to partner with the Athletics Department to provide additional benefits to attendees.

Wine Tasting  
**(Saturday, March 7, 2009)**

The Center hosted an evening of wine tasting and socializing featuring three local wineries. Each winery showcased two of its favorite vintages. A musical duo consisting of an acoustic guitarist and a cellist provided background music. The Emeriti and Retiree’s Associations provided appetizers to accompany the wine. This was a highly successful event, with 92 attendees, and plans are to continue it annually.

Picnic Day  
**(Saturday, April 18, 2009)**

Retirees were well-represented in the annual Picnic Day parade. The Retirees’ Association honored retiree Lorena Herrig, who rode in a white horse-drawn carriage accompanied by incoming Association President Yvonne Marsh. The Retiree Center sponsored a classic Ford Mustang convertible carrying the association presidents and the chair of the Retiree Center Advisory Committee.

Following the parade, the Retiree Center hosted an exhibit on the north lawn of Everson, featuring information about Center activities and the “Healthy ‘til 100” Wellness Challenge, all under a large tent. Several retirees volunteered to assist with disseminating information at the exhibit.

Steak Bake  
**(Saturday, June 6, 2009)**

The Steak Bake is the Center’s premier social event of the year, reviving a very popular Faculty Club event from years past. Retired faculty and staff served as “celebrity” barbecue chefs for the evening, and their grilled steaks were complemented with side dishes, beverages, and desserts prepared by Sodexo Dining Services. At this year’s event, Professor Emeritus Charley Hess hosted a special tribute to Chancellor and Mrs. Vanderhoef. Approximately 140 retirees attended the Steak Bake this year, which is almost double the attendance at last year’s event.
**TRiO Scholars Mentorship Program**

Nearly from its inception, the Retiree Center partnered with the Learning Skills Center to match retiree mentors with TRiO Scholar students. Mentors shared their knowledge and experience with first-generation, low-income college students to provide them with extra support during their years at UC Davis. Results of the program were a bit mixed; several students and mentors placed a high value on their experience, but it was difficult to recruit and retain students due to their often demanding and conflicting schedules. After evaluating the successes and challenges with the program, the Learning Skills Center decided to conclude this mentorship program at the end of the 2008/09 fiscal year.

**Return to Work Program**

The “Return to Work” program, which has received collaborative attention from the Retiree Center and the UC Davis Human Resources Department, would have provided a database where recruiting managers could list open positions appropriate for retirees and where retirees could post their resumes for consideration by hiring managers. Several factors have caused this program to be placed on hold: new UC policy that limits retiree re-employment, the cost of implementing the program, concerns about community perceptions of this program in a time when campus preferential rehire lists are growing, and a reduced number of hiring opportunities on campus. The Center may explore simpler alternatives for informing retirees of part-time, limited appointment work opportunities.

**Convocation Open House**

For two years, the Retiree Center planned an open house following the convocation at the beginning of fall quarter. In 2007, as the Center celebrated its first anniversary, this was a means of introducing itself to the campus, and helping retirees locate the Center. It also seemed like an excellent opportunity to invite recent retirees to return to campus after their first summer of separation. With this in mind, the event was held again in 2008. However, in light of the Centennial celebration, a larger-than-normal reception at the Mondavi followed the convocation. Most retirees opted to attend the Chancellor’s reception and not trek to the Retiree Center’s reception. While we will encourage retirees to attend the convocation, we will no longer plan a Center-hosted event on that day.

**Basketball Tailgate Party**

Similar to the Football Tailgate Party, this event provided retirees with a chance to gather prior to a basketball game for refreshments, and to sit together during the game. The Retiree Center worked with the Athletics Department to coordinate the pre-game reception. The event was not well-attended, so it will not be repeated.
In addition to the previously mentioned programs, the Center focused efforts this year on improving and enhancing several different components of daily operations, in an effort to make the most of somewhat limited resources.

**Volunteer program**

During the past year, as the Center has expanded and improved program offerings to better meet the needs of all retirees, we have relied more heavily on volunteers to help us meet our goals. We therefore took steps to improve and enhance our volunteer program, and stepped up recruitment efforts.

Retirees responded with great enthusiasm and assisted with event planning and implementation, office and administrative tasks, outreach and marketing efforts, and other special projects. In June 2009, Center staff organized a volunteer appreciation luncheon to express our gratitude to more than 50 volunteers who contributed to the Center’s success during the past year.

**Student assistant**

The Retiree Center’s program assistant has assumed more responsibility with event planning, database development and management, webpage design and upkeep, and other higher-level responsibilities. As a result, the Center hired a student assistant to assist with more routine office tasks.

We were able to find a very qualified student who has a work-study award, which is very cost-effective for the Center, since we only pay 25% of the student’s salary. The student will start working in September 2009.

**Daily operations**

A great deal of effort was put into increasing office efficiency during this year because the Center is attempting to expand programs while grappling with budget cuts. Improvements such as fiscal timelines, event planning schedules and summaries, newsletter production schedules, and other similar systems will allow the staff to plan efficiently, anticipate conflicts, and work proactively rather than reactively.

Center staff has also undertaken a major project in conjunction with the OCP IT department to revise and merge the Retiree Center and association databases to reduce staff time required for maintaining and updating the information. This project will continue into 2009/10. The staff will continue to analyze day-to-day operations to most effectively and efficiently implement our programs and services.
Since the Retiree Center’s creation in 2006, much effort has gone into increasing awareness of the Center’s services and programs among the campus community. This year, we implemented several new initiatives to increase the Center’s visibility and build awareness among current as well as retired employees, including the following:

**CenterNews**

The challenges of communicating with over 6,500 retirees cannot be underestimated. This year, the Center developed the CenterNews, a new thrice-yearly newsletter to disseminate information to our constituency. The newsletter represents a significant percentage of our operational budget, but it is the most cost-effective method of communicating with such a large number of retirees. In an effort to reduce costs, as well as to be more environmentally conscious, we encourage retirees to receive the newsletter via e-mail, and with each issue, an increasing number choose that option.

**Web site revisions**

Since a significant portion of retirees do not live within easy driving distance of the campus, the Center undertook a major project to provide more information on our Web site. Several pages were expanded to include more details and new pages were added, including “About Us,” “Frequently Asked Questions,” “Planning for Retirement,” and “Volunteer Opportunities.” Since the changes have been implemented, the number of people visiting the Retiree Center Web site has increased by approximately 175%.

**Brochures**

We expanded and revised our “Stay Connected” brochure to include additional information about services and benefits available to retirees. In addition, we created a new “Steps to Retirement” brochure for current employees. The Benefits Offices distribute the brochures at their retirement classes and at individual retirement meetings. We distribute the “Steps” brochures at outreach events. Both of these brochures have proven to be popular, and a second printing is planned for each.

**Exhibits and display materials**

The Center participated in several outreach events this year, including the “Soaring to New Heights” staff luncheon, TGFS luncheons at both UC Davis and the health system, and a health fair at the Davis Senior Center. At these events, the Center distributed the two previously-mentioned brochures and answered questions. This year, the Center ordered three large display banners and a tent imprinted with our logo to enhance our exhibits. The eye-catching display resulted in increased traffic to our booth at all of these events.
One of the most important aspects of the Retiree Center’s mission is the administrative support we provide to the Retirees’ and Emeriti Associations. During the past year, all three entities worked in a very positive and collaborative manner on numerous projects, including:

**Retiree Center Activities**
Both associations contributed greatly to the success of the Center programs through a variety of means, including providing financial support, volunteering to serve on committees, and encouraging attendance at events.

**Association General Meetings & Noon Talks**
Center staff reserved rooms, arranged for catering, coordinated publicity, provided printed materials, and assisted with registration for the quarterly joint association general meetings and monthly Noon Talks.

**Newsletters**
Center staff coordinated with the association’s editors on articles, completed the layout, prepared the mailing lists, and oversaw distribution for two different thrice-yearly association newsletters. At the end of the year, the associations decided to join together to produce a joint newsletter, so the Center staff will be coordinating with the co-editors to create this new publication.

**Executive Board support**
Center staff assisted with preparations for monthly Executive Board meetings for both associations, including reserving rooms, printing agendas and additional documents, notifying board members, and attending meetings.

**Membership support**
Membership chairs for each association worked with Center staff to coordinate new membership and annual renewal drives, and to update and maintain accurate membership rosters. The Center launched a new policy of offering reduced prices for Center events to association members as an incentive to join the associations. This policy is having the intended effect; with each event the associations have gained several new members.
**Video History Project**
Center staff provided technical and administrative support to the Emeriti Association's Video History Project, including attending meetings, ordering equipment and software, and assisting with software training.

This year, the project increased significantly in scope, as the committee created a series of 17 DVD's for the UC Davis Centennial, which were a compilation of footage that has great historical significance.

**CUCRA/CUCEA**
The Emeriti and Retirees’ Associations are both actively involved in their UC-wide umbrella organizations, the Council of University of California Retirees’ Associations (CUCRA) and the Council of University of California Emeriti Associations (CUCEA).

Through involvement in these groups, the associations can influence system-wide changes and advocate on behalf of all retirees. Center staff members provide support for this involvement, including attending the twice-yearly meetings, making travel arrangements, and processing payments for expenses.

**New Retirees Reception**
The Retirees’ Association conceived of and implemented this new event, with the assistance of Center staff. The reception honored all faculty and staff who retired from UC Davis and the health system during the 2008/09 academic year.

This was the inaugural event of what will become an annual celebration, to be held in June each year. At this year’s event, Enrique Lavernia, Provost and Executive Vice Chancellor of UC Davis, Dr. Edward Callahan, Associate Dean of Academic Affairs for the School of Medicine, and Bob Chason, retired CEO of the UC Davis Health System, were all present to congratulate new retirees on this significant occasion.

The reception was held at the University Club, and featured appetizers, wine and non-alcoholic beverages. A violinist provided background music. By all accounts, this event was a resounding success, and many retirees mentioned that they felt very honored to be invited. Next year, we plan to make this an official Center event, and have received approval to hold the event at the Chancellor’s residence. The associations will co-sponsor the event, and have already pledged monetary support.
The Retiree Center established and/or improved relationships and collaborative partnerships with several different campus and community entities during this fiscal year. These partnerships have proven to be invaluable assets in expanding the breadth and depth of our programming and outreach efforts.

**Benefits Offices**
Center staff members coordinated successfully with the Benefits office staffs at UC Davis and the health system to distribute information to new retirees, promote benefits presentations and Healthcare Facilitator Program classes, provide appropriate referrals to retirees, and coordinate and promote pre-retirement workshops. This has been a mutually beneficial collaboration, and we hope to continue utilizing the same positive strategies in the future.

**Osher Lifelong Learning Institute (OLLI)**
Center staff facilitated a meeting between the Retirees’ Association and the OLLI staff to reach a better understanding among association members of the institute’s mission and goals, and to discuss opportunities for the organizations to work together in the future. OLLI offered to provide complimentary memberships to members of both associations for the 2009/10 academic year. The associations invited OLLI to provide information at the quarterly general meetings, and OLLI announcements were included in retiree newsletters, as space allowed. This should prove to be another positive partnership.

**Comparable university retiree centers**
On several occasions, Center staff garnered information and shared resources with other UC and non-UC retiree centers in California, which proved to be a valuable time and money saver, providing us with efficient comparative studies, new program inspiration, and document templates.

**Davis Senior Center**
Center staff initiated quarterly meetings with the city of Davis Senior Center staff to discuss joint projects and brainstorm methods for cross-promotion of our programs. As a result, the Center promoted the “Healthy ’til 100” Wellness Challenge at a Health and Fitness Day at the Senior Center and helped to publicize some Senior Center activities. This local partnership has been mutually beneficial, and we plan to continue this effort.
Financial summary
The Retiree Center’s 2009/10 operating budget included $40,720 for program and operating expenses, and $129,480 for salaries. Expenses for the year were $41,468 for program and operating expenses, for a slight overage of $748. Because of the absence of a permanent director for several months during the year, the Center experienced salary savings of $36,650. This savings will be added to previously-accrued carry-forward funds to help the Center compensate for anticipated budget cuts in the 2009/10 academic year.

Operating Expenses

- Programs and Events $5,580
- Communications and Outreach 15,265
- Travel 2,622
- Memberships 585
- Association support 8,142
- Office & Miscellaneous expenses 9,274

Total $41,468

Goals and objectives

- Quest for space
  The Retiree Center has been housed in small temporary offices since its inception. As envisioned, the Center will become a hub of activity for retirees. In order for this to become a reality, the Center must move to a larger permanent home. To this end, a space sub-committee has been established which will draft a space proposal and actively advance it through university channels. Securing adequate permanent space is the Center’s highest priority for the coming year.

- Continue successful annual events
- Expand programs to the UC Davis Health System campus
  1. Winter joint association general meeting in February
  2. Older Americans Month speaker series in May

- Implement quarterly day trips
- Continue to expand volunteer program
- Create a benefactor program
- Execute “It’s Never to Early to Plan for Retirement” campaign