

# Emeriti/Retirees Newsletter

Emeriti/Retirees Center 805-893-2168

University of California, Santa Barbara



## From the Retiree President

Dear Retirees,  
We invite you to join us at the monthly breakfast meetings held at the Cody's Café, Turnpike and Hollister in the Garden Room, on the third Wednesday of the month at 9:00 a.m. You order what you want from the menu and pay accordingly. Everyone who attends has a chance to win a free breakfast. You are also invited to join us at our first Wednesday of the month board meetings held at Cody's at 9:00 a.m.

We all look forward to this fall and the great programs we have planned for retirees. At our first general meeting on September 16<sup>th</sup>, retirees were treated to a special talk

by Professor Emeritus Richard Oglesby, from the History Dept. at UCSB. He spoke about the Santa Barbara Stone Architecture.

You will not want to miss our October 21<sup>st</sup> meeting with Laura Morgan, UCSB Health Care Facilitator, who will discuss the 2010 medical and dental plans.

Our annual Holiday Luncheon is a very popular event and again we have scheduled it at the Elks Club. Please keep Tuesday, December 15<sup>th</sup> open on your schedule and join us for a wonderful meal and entertainment. More information will be mailed to you at a later date with a

reservation form.

We have missed some of our retirees who have not renewed their membership. We would encourage you to renew and become active in our meetings and special events. This is a good time to socialize and let us know how you are doing in your retirement.

I look forward to seeing you at our next breakfast meeting. Please join us and let us know if you have any questions or suggestions. Stay well and don't forget to get your annual flu shot and wash your hands frequently.

Barbara Anderson,  
President  
UCSB Retirees Association  
Barbara62239@gmail.com

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## From the Emeriti President

Colleagues,  
I hope everyone had a wonderful summer and were able to recover some of your 401b values. The Emeriti Association has several events planned for the Fall. First, there will be the annual Fall Emeriti Luncheon scheduled for Saturday, October 24<sup>th</sup> at the Faculty Club. Besides the usual delicious lunch and interesting speaker we are going to expand the social hour so you can have more time for mixing with your colleagues. A separate notice will be sent later in the

weeks ahead. I have been talking about the President's Task Force on Post Employment Benefits and potential changes to your health benefits. Representatives from the Task Force will be on campus sometime in November to hold a "Listening Forum". They won't just be listening but will be trying to educate stakeholders on the long term issues. I will be sending out more information on the event when the date and time are known. Watch your emails

and campus news. Bill Ashby and I will be attending the Council of UC Emeriti Associations meeting at UCSF in late October to hear the latest from the President's Office on benefits and UC financing. We will report back to you at the meeting conclusion. Email me with your ideas for future events or activities. See you October 24<sup>th</sup>.

W. Douglas Morgan  
President, Emeriti Association  
dmorgan@econ.ucsb.edu

UC & UCSB News...



Storke Tower

## Task Force to Hold Forums on Future of UC Retirement Benefits

The UC President's Task Force on Post Employment Benefits is holding forums at UC locations throughout the fall to give faculty, staff and retirees the opportunity to ask questions and learn about how fiscal pressures are affecting the University's pension and retiree health benefits. (Task Force members' names can be seen at: [http://www.universityofcalifornia.edu/news/ucrfuture/task\\_members.html](http://www.universityofcalifornia.edu/news/ucrfuture/task_members.html)) UC offers employees attractive pension and retiree health benefits as part of its efforts to attract and retain outstanding

faculty and staff, as well as to reward employees for their years of career service. But the cost of those benefits has increased substantially, a trend that is projected to continue. The Task Force has been charged with developing options for balancing the long-term costs of post employment benefits with the need to provide competitive compensation to faculty and staff, and will study the issues, weigh input from the UC community, and then make recommendations to President Yudof on ways to change funding and policies. The Task

Force will hold forums at UC locations throughout the fall to give faculty, staff and retirees the opportunity to ask questions and learn about how fiscal pressures are affecting the University's pension and retiree health programs. The schedule of local sessions is beginning to take shape and will be available online at the Future of UC Retirement Benefits website. Check [http://www.universityofcalifornia.edu/news/ucrfuture/emp\\_task.html](http://www.universityofcalifornia.edu/news/ucrfuture/emp_task.html) for upcoming campus-specific dates and local announcements.

for full article go to: <http://www.universityofcalifornia.edu/news/article/21745>

## The Issues...



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**UC Retirement Plan:** Currently, UC pays out approximately \$1.5 billion annually in pension benefits, including continuing monthly pensions and one-time lump sum cashouts. Each year the Plan accrues an additional \$1.3 billion in liability for active employee members earning additional benefits. While the Plan is currently 95% funded, it is projected to continue to decline to 61% funded by 2013, even with contributions scheduled to resume in April, 2010.

**Retiree health insurance:** UC currently pays, out of operating revenue, approximately \$225 million each year to provide health insurance to retired employees. These cash costs are projected to increase at a rate of about \$37 million per year to \$373 million by 2013, and to \$610 million by 2018. Additionally, the projected total cost for retiree health insurance for the life of current and future retirees will increase from \$13 billion today to \$18 billion by 2013 and to nearly \$26 billion by 2018. Governmental accounting regulations now require employers to include this liability in their financial statements, which means the liability must be reported annually on UC's financial statements. Such a significant liability could affect UC's credit rating when seeking funding for campus buildings, hospitals and other bond-funded programs.



Henley Gate

Scheduling of the Listening Forum at UCSB is underway.

The schedule of local sessions will be available online at the Future of UC Retirement Benefits website:

[http://www.universityofcalifornia.edu/news/ucrfuture/emp\\_task.html](http://www.universityofcalifornia.edu/news/ucrfuture/emp_task.html)

Check back for more campus-specific dates and watch for local announcements.

## Open Enrollment for 2010; October 29<sup>th</sup> – November 24<sup>th</sup>

**Open Enrollment** is a time to review your university sponsored insurance and make any needed changes for the next year. The Open Enrollment period starts on Thursday, October 29 and ends on Tuesday, November 24. All changes made during Open Enrollment will be effective on January 1, 2010.

In late October you will receive an Open Enrollment packet in the mail. The packet will contain an individual benefit summary and more details about plan options and monthly costs. We expect very few changes in our UC health plans in 2010.

**No Benefits Fair this Year**  
There will be no Retiree

Benefits Fair this year. Since there are very few plan changes in 2010 and to save on Open Enrollment expenses, the UC Campuses will NOT host Open Enrollment fairs for retirees this year.

### Need more information?

UC Benefits Customer Service  
<http://atyourservice.ucop.edu>  
1-800-888-8267

On October 21<sup>st</sup> Laura Morgan, UCSB Health Care Facilitator, will present **Open Enrollment Highlights** at the Retiree Association's General no-host Breakfast Meeting at Cody's Café, on Hollister in Goleta. (see page 5 for meeting schedule)

## Medicare and UC Medical Plans

Learn how Medicare coordinates with all of the UC medical plans. Topics include: when to enroll in Medicare, which physicians are covered by your medical plan, how to access care, cost of care, monthly premiums, Medicare Part D (drug) and plans available when living outside of California. We will also present an overview of changes in the retiree health plans for 2010. Medicare and UC Medical Plans Workshop:  
**Wednesday, November 4<sup>th</sup> 9:00am - 11:00am**  
UCSB Human Resources Learning Center  
SAASB 3101DD (near Mesa parking structure)



## Cottage Health System Senior Expo



Last year more than 500 seniors gathered at the Earl Warren Showground to attend the annual Cottage Health System Senior Expo. This year, the 20<sup>th</sup> annual health expo will be held on Thursday, October 8<sup>th</sup>. Flu shots and fitness testing are just two of the many services and exhibits offered at this year's Expo.

**Thursday, October 8<sup>th</sup>**  
**9:00 a.m. – 1:00 p.m.**

Earl Warren Showgrounds  
Las Positas Road at Calle Real

**\$10 admission includes lunch and a flu shot!**  
900 flu shots will be provided by Cottage Health System and Sansum Clinic.

**Fitness testing:** Strength, balance, and flexibility assessed by a team of

physical therapists and fitness professionals.

Additional presentations include: Telemarketing fraud, Travel safety, Medicare prescription drug card, and 90 community agencies, organizations, and businesses presenting a variety of products and services. Parking for the event is free.

For more information, call Dana Goba, Community Health Coordinator:  
805-879-8992.

## Fidelity® Retirement Services Workshop

Do you have questions or want to know more about your UC retirement funds? Rayna Brower, Senior Retirement Counselor with Fidelity Retirement Services comes to campus to administer workshops for UCSB. Fidelity Retirement Services is the record keeper for your retirement plan. As a part of the agreement UC made with Fidelity, they offer workshops to educate faculty, staff and retirees on their retirement plans and benefits.

The workshops will be held on the third floor of the SAASB 3101 Building (Human Resources Learning Center, near Mesa parking structure).

### Quarterly Market Perspective

- Have a better understanding of current market trends
- Review the most recent quarter's market performance
- Discuss economic topics

November 3<sup>rd</sup> at 1:15 p.m.

December 2<sup>nd</sup> at 11:15 a.m.

### Taking Charge of your Financial Fitness

- Understand the importance of saving
- Learn how to evaluate debt
- Outline strategies to take charge of your finances

October 6<sup>th</sup> at 1:15 p.m.

November 4<sup>th</sup> at 10:00 a.m.

December 2<sup>nd</sup> at 10:00 a.m.

To reserve a space in the workshop, call 1-800-642-7131, Monday through Friday, 5:00 a.m. to 9:00 p.m.

Other Fidelity workshops: [http://hr.ucsb.edu/benefits/pdf/2009\\_4th\\_quarter\\_Fidelity%20workshop%20schedule.pdf](http://hr.ucsb.edu/benefits/pdf/2009_4th_quarter_Fidelity%20workshop%20schedule.pdf)



## Good News for Gaucho Fans!

If you are a retired UCSB faculty or staff, you are eligible for a significant discount on season tickets for UCSB Men's and Women's Basketball.

Season tickets are regularly \$125 for men's basketball and \$100 for women's basketball to the general public.

That means season tickets for current and retired staff and faculty are available at \$62.50 and \$50 – that's 50% off! The full schedules are available at [UCSBgauchos.com](http://UCSBgauchos.com). There are currently 14 basketball games for the men and 15 games for the women.

As a reminder, the discount is for season tickets only, not for single game tickets.

You will need to show your emeriti or retiree ID card and maybe a picture ID when making your purchase. Good news, right? Pass the word!

*Go Gauchos!*

## Questions on the Law...



"What should I do if I suspect someone is abusing or exploiting an elderly friend?" "Is there anyone who will check on my elderly father's well-being for me?" "What should I do if I am having trouble paying my bills?" "If I am receiving Social Security income, can my creditors get a hold of it?" These are some tricky questions; do you know the answers?

To find out more, check out *Seniors and the Law; a Guide for Maturing Californians*, published by the California Bar Foundation.

<http://www.calbar.ca.gov/calbar/pdfs/publications/Seniors-and-the-Law.pdf>

California Bar Foundation, 180 Howard Street, San Francisco, CA 94105 email: [info@calbarfoundation.org](mailto:info@calbarfoundation.org)



## Helpful Numbers

Santa Barbara County has a number of agencies who offer assistance to seniors. If you or someone you know is looking for information for anything from senior fitness activities & social circles to Meal-on-Wheels, the below contacts can help. **Call 800-510-2020 for the nearest Area Agency on Aging office wherever you live.**

### Santa Barbara Meals-On-Wheels

Phone: 805-683-1565

Office Hours: 9 a.m. to 12 p.m.

Meals delivered to home-bound seniors

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### Community Action Commission (CAC) of Santa Barbara County

Phone: 805-964-8857

Toll free: 800-655-0617

Email: [ideas@cacsb.com](mailto:ideas@cacsb.com)

Dining rooms located in various locations in the county. Mobile Meals are available to seniors over 60 and homebound. Nominal suggested donation of under \$3 per meal.

### Central Coast Commission for Senior Citizens/Area Agency on Aging

Phone: 805-925-9554

Email: [seniors@slonet.org](mailto:seniors@slonet.org)

**800-510-2020 for the nearest Area Agency on Aging office wherever you live**

The Area Agency on Aging (AAA) coordinates and monitors a system of services for seniors. In recent years over 2.3 million dollars has been allocated per year by the AAA to support programs such as home delivered meals, respite for caregivers, transportation services, and senior employment services.

### Santa Barbara Parks & Recreation

Phone: 805-897-2568

<http://www.santabarbaraca.gov/Resident/Health/Seniors/>

Fitness classes designed for older adults are offered as part of a low-cost membership. In addition to dance and fitness, the program offers lawn bowling, personal enrichment classes, and social programs including foreign language, bridge, crafts, and painting.

## Sharing Local History

The Santa Barbara Historical Museum is looking for volunteers who want to share the history of Santa Barbara with children and adults. The museum currently needs people who are willing to do adult tours of our galleries, outreach programs to the community and programs for school children.



Since some people prefer working with adults and others with children, not all docents have to do tours for both groups. If you want to share our story with others, we will find a place that is right for you. In our docent training classes, you will take field trips to local historical sites, have tours of our

galleries and historic homes, be mentored by an experienced docent, and be welcomed into a community of people who also share a love of local history.

For more information, please call 805-966-1601 or email us at [education@sbhistorical.org](mailto:education@sbhistorical.org)



## Annual Emeriti Association Fall Luncheon

It's time again for the Fall Emeriti Luncheon! The luncheon will be held at the UCSB Faculty Club on **Saturday, October 24<sup>th</sup>**, social hour beginning around 11 a.m.

Invitations to the luncheon will be sent to all Emeriti. If you have not received an invitation by October 12<sup>th</sup> and are interested in attending, please call the Emeriti/Retiree Center at 805-893-4119.... all are welcome! The luncheon is \$18 per person for wonderful company, an interesting speaker, and a delicious meal.



## November 18<sup>th</sup> – Neal Graffy at Retiree Association Meeting

In 1851 the Town Council of Santa Barbara appointed a committee to apply names to the fifty-two new streets being created from "...the front of the Mission Gardens to the sea and from hill to hill on each side..." as a result of the survey of Salisbury Haley. Unlike other towns whose streets bore the unimaginative A - Z, numbers, trees or names of presidents, they gave names to our streets that portrayed the geography and botany of our town, honored the Chumash, early settlers, governors, and showed a distinct sense of humor and in some cases, delightful sarcasm. Author and local historian Neal Graffy shares with us the stories behind these names.



Neal is almost a Santa Barbara native, the result of a premature birth nine years too soon in

Wichita, Kansas. His love for Santa Barbara History began at age 13 when he started gardening and doing odd jobs for Mrs. Leontine Phelan, a descendant of the founder of the Santa Barbara Presidio. See Neal at the Retiree Association Breakfast meeting on November 18<sup>th</sup> (see schedule at right).

## Retiree Breakfast Meeting Schedule

Held on the third Wednesday of months September thru May, at **Cody's Café** at Hollister and Turnpike. Join us for an interesting meeting topic and a chance to win a free breakfast!

### 2009

October 21 – Laura Morgan, UCSB Health Care Facilitator

November 18 – Historian & Author, Neal Graffy, on Street names of Santa Barbara. Neal will have books for sale and be available for signings

December 16 – Holiday Luncheon (invitations coming soon)

### 2010

January 20 – Janice Cloud on Genealogy

*(topics and guests are subject to change – we will do our best to keep you informed) Questions?*

*Call Barbara Anderson:  
805-967-8900*



Clifford Barraclough  
German, Slavic & Semitic  
Retired 1991

Georgia M. Holt  
Residence & Dining Halls  
Retired 1989

Palmer O. Madland  
Facilities Management  
Retired 1979

## In Loving Memory

Marian Pentecost  
Classics Department  
Retired 1991

Elizabeth Ann Ramos  
Department of Dean of  
Students  
Retired 2003

Diane Pringle Scott  
Letters & Science  
Retired 2007



Brian W. Selander  
EAPC  
Retired 1991

Alan Stephens  
English Department  
Retired 1989

Glen Wade  
Electrical & Computer  
Retired 1991

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We're on the Web!

<http://hr.ucsb.edu/emeriti/>

## Retiree Association Officers (2009-10)

|                  |                  |                                                      |
|------------------|------------------|------------------------------------------------------|
| President        | Barbara Anderson | Program Assistant<br>Donn Miller                     |
| Vice President   | Shirley Dunbar   | Listening Forums<br>Location Sponsor<br>Pat Sheppard |
| Secretary        | OPEN             | CUCRA Rep<br>Tippi Lawrence                          |
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| Program Chair    | Betty Koch       |                                                      |

## Emeriti Association Officers (2009-10)

|                |                   |                      |
|----------------|-------------------|----------------------|
| President      | Doug Morgan       | <b>Board Members</b> |
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| Secretary      | Janice Cloud      | Alice Condodina      |
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### EMERITI/RETIRES CENTER

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