

UC Santa Barbara Emeriti Association Report to CUCEA

October 2024

The UCSB Emeriti Association has been busy since CUCEA's Spring meeting. The EA Board met on May 7, by zoom, in conjunction with a general business meeting of the Association. The Board meets again on October 24, in a hybrid in-person/zoom format. During the past six months the Board has welcomed three new members and has had two resignations. The Association operates on a no-dues basis, with membership granted automatically to emeriti and eligible academic retirees. We currently have 617 members, including 486 emeriti and 131 academic retirees.

A highlight of the year is that the position of Coordinator of the Emeriti & Retirees Center, supporting both Associations, has been made full-time and has been reclassified at a higher level. We are delighted to welcome Ellen Pasternack to her expanded role.

Emeriti Association business.

Since the Association's move last year to a model of funding by donation rather than by membership dues, the Development and Engagement Committee has conducted a very successful fundraising campaign to continue and augment our support for Promise Scholars. This year we plan to support two new Promise Scholars, for a total of six. Meanwhile, during the past year, other ad hoc donations have been sufficient to support the Association's operations; but going forward we are planning a more formal approach to raising operating funds, including a smoother system to accept donations online, independent of the annual Promise Scholar fundraising. The UCSB Development Office has approved a new **Emeriti Association Program Fund**, for which donations will be credit-card based and tax-deductible. The Executive Vice Chancellor has also committed \$15,000 to the Emeriti Association on a recharge basis to support two initiatives: the oral history project and a mentorship program between emeriti and Promise Scholars.

The Association's Committee on Emeriti Welfare was conceived as a follow-on to the UCSB Chancellor's Task Force on Emeriti and Retiree Issues, which operated during 2022-23. One key recommendation of the Task Force was that the position of Coordinator of the UCSB Emeriti & Retirees Center be made full-time, with a classification comparable to those of other UC campuses; as noted above, that recommendation has been granted by the Chancellor. A second recommendation was that UCSB follow the practice of several other UC campuses and institute a part-time emeriti recall position of Faculty Liaison to help counsel faculty contemplating retirement. That recommendation was initially received favorably but has now been put on hold. There has been no further action on the other recommendations of the Task Force, which included addressing the urgent need for full-time on-campus retirement advising. On the whole, it remains the case that administrative support for UCSB emeriti and the Emeriti Association is embarrassingly low relative to other UC campuses.

In early 2024 the Emeriti Welfare Committee instituted an annual survey on experiences with the retirement process. The goal is to gather data to support advocacy for improvements in the process for the benefit of both current and future emeriti, and to monitor the effectiveness of the retirement process over time. The first survey, in Spring 2024, canvassed emeriti in the 2022 and 2023 cohorts. Our report on those results is attached. The responses are striking in several ways. Particular highlights include the impact of the lack of on-campus resources for retirement advising, and the existence of profound problems in advising for and execution of retirement medical coverage. We are surveying the 2024 cohort this fall.

We are also working on a compilation of information about retirement and emeriti rights and privileges, which will among other things be a feature of the Association's new web site. One question that has arisen is policy on retaining UC or UCSB research funding after retirement for use in ongoing research. It seems that there is no UC-wide policy on this, but some UCSB departments and divisions are clawing back such funds.

Activities and events since April 2024 report.

- The monthly Bike to Breakfast rides continue to be popular. These are rides of 10 to 15 miles on local bike paths and quiet streets of Goleta, Montecito, and Santa Barbara. The rides are designed to be safe, suitable for both beginners and experienced riders, friendly to both conventional and e-bikes, and to -- importantly -- include a stop for breakfast!
- The Emeriti & Retirees Center and Fidelity Investments have been partnering on a monthly series of financial workshops geared toward retirees and emeriti, including most recently "Charitable giving: How to build your impact," on October 9.
- September 3: Campus botanical walk. Guided by Bruce Tiffney, Professor Emeritus of Earth Sciences and retired Dean of the College of Creative Studies.
- October 3: Tour of the UCSB Art, Design & Architecture Museum, including the featured exhibition "POOCH: The Art Full Life of Keith Julius Puccinelli." Guided by Museum Director Gabriel Ritter, Professor of the History of Art and Architecture.
- October 15: Chancellor's reception for New Emeriti and Retirees, Mosher Alumni House.
- The schedule for late fall and winter includes a variety of talks and guided nature tours.

Archives of webinars are available at <https://www.hr.ucsb.edu/events-archive>

Respectfully submitted,

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