ERRC relocation

The biggest news is that the ERRC is losing its office suite in Rolfe Hall and will be relocated within the next few months. The ERRC is the only non-Social Sciences Department unit in an otherwise academic building, and our space is needed for expansion of the department. We do not yet know when or where we are going, but negotiations are underway with the Faculty Center Board of Governors to move the ERRC to the Faculty Center. We hope that an agreement can be reached, as the Faculty Center would be an ideal location. This option will likely involve a move to a small temporary space at the Faculty Center while more extensive major renovations, that will include space for the ERRC, are undertaken there in the next two or three years.

Retiree programs

We offered fewer retiree programs than normal during the fall and winter quarters, as we were working to develop our new retirement planning workshop series for staff and to resurrect the retiree picnic in the spring. Since October 2017, the ERRC offered several programs for retirees and has worked on details for several upcoming programs:

- **Luskin Conference Center Tour** (11/2)—approximately 20 retirees attended this tour of the new conference center and enjoyed lunch in the hotel restaurant.
- **Open Enrollment Workshops** (11/3, 9 & 13)—we partnered with the UCLA Health Care Facilitator to offer informational sessions for retirees.
- **Belmont Village Retiree Reception** (4/19)—Belmont Village, a retirement community near the UCLA campus, has an agreement with UCLA to provide $10,000 per year each to the retirees’ and emeriti associations. This reception will feature the Belmont owner, who will provide an update on Belmont developments and recognize the UCLA partnership.
- **Medicare/Social Security** (5/2 & 5/3)—we are partnering with Kaiser Permanente and Fidelity to offer this two-part workshop for those who are not yet drawing Social Security and/or who are nearing age 65. One session will be offered at Belmont Village, near campus, and one will be offered at the Kaiser Office in Woodland Hills for our retirees who live in San Fernando Valley.
- **Retiree Picnic** (6/2)—we began working with a planning committee to resurrect this event, which has been very popular in the past. The event will be jointly sponsored by the ERRC, UCLA Retirees Association (UCLARA) and UCLA Emeriti Association (UCLA EA). Using the CUCRA retiree survey as a catalyst to discuss the many contributions retirees make to UCLA, we were able to negotiate free rental of a new pavilion at the Botanical Garden in exchange for allowing the garden to staff a table at the picnic. We are working to secure other financial sponsorships from off-campus partners.
- **First Fridays Technical Tutorials**—we continue to offer these one-on-one tutorials every other month (June, August, October, December, February, April) utilizing UCLA IT volunteers.
- **Fidelity consultations**—we provide office space for individual meetings with a Fidelity representative and employees and retirees several times per month.

Retirement planning classes

- **Path to Retirement workshops for faculty** (Fridays, March 9, 16, 23, 2018)—we worked with the UCLA Faculty Retirement Liaison to plan this workshop series; topics included UCRP, retiree health plans, emeriti rights and privileges and an emeriti panel. Approximately 60 faculty members registered for the series: attendance varied at the three sessions.
- **Path to Retirement workshops for staff**—we partnered with Campus Human Resources (CHR) to offer this new series for staff; topics included UCRP, retiree health plans, Social Security, retirement income planning, non-financial transitioning issues and a panel of retirees. Approximately 200 staff attended, and feedback was very positive.
Support for UCLA Retirees Association (UCLARA) and UCLA Emeriti Association (UCLA EA)

- **Support for association programs and initiatives**—we continue to provide administrative support for both associations’ programs (monthly after-lunch programs, quarterly dinners, art shows, day trips, etc.), newsletters, awards, sub-committees, publicity efforts and other initiatives.
- **Emeriti Association 50th anniversary**—we helped to publicize and provided some assistance at the Emeriti Association’s 50th anniversary dinner, which was held on November 8.
- **UCLA EA Emeriti Awards**—winter quarter is a very busy time for the EA’s award selection processes, we provided quite a bit of coordination for the Dickson Award, Goldberg Award and the UC-systemwide Panunzio Award.
- **CUCRA Retiree Survey**—we are working with a sub-committee of the UCLARA board to publicize and disseminate the CUCRA Retiree Survey, “UC Retirees: Advocates, Ambassadors, Assets.” In addition, the ERRC director continues to correspond regularly with representatives from all of the interested UC locations to share ideas regarding report publicity and dissemination.
- **UCLARA Membership Management System**—we continue to provide quite a bit of support for UCLARA’s new online membership and event management system.
- **Website maintenance**—we maintain and update the websites for both associations.
- **Caregivers’ Support group**—we continue to support the UCLA EA caregivers’ support group.

**Communications/outreach**

- **Welcome to Retirement letters**—we continue to send welcome letters to newly-retired faculty and staff on a monthly basis, informing them of our services and encouraging them to join their respective association.
- **E-newsletter**—we sent the ERRC retiree e-newsletter twice per month to 3,800+ retirees for whom we have email addresses.
- **Outreach to active faculty and staff**—we continue to briefly summarize the ERRC’s services to attendees at Human Resources’ retirement planning workshops. In addition, we partnered with UCLARA to staff tables at two major campus events, the Small Business Fair and the Travel Fair, where we distributed our “Steps to Retirement” brochures and UCLARA brochures and answered general retirement questions. We have made progress with outreach to UCLA Health, which has been challenging in the past. We will now be invited to staff tables at their retirement planning workshops and their annual Open Enrollment Fair. They will also include announcements about the ERRC and UCLARA in their “Financial Wellness” e-newsletters.
- **Marketing materials**—in conjunction with both associations, we finalized the design and printing of brochures for all three entities. We are now working on promotional banners.

**Miscellaneous**

- **Retiree privileges**—we continue to facilitate retiree requests for parking permits with the Parking Office, ID cards with the BruinCard Office and email continuation with the Bruin OnLine Office.
- **Notary services**—we continue to offer free notary services for retirees and their spouses/partners.
- **Survivor outreach**—we continue to reach out to recent widows/widowers with condolence cards and phone calls.
- **UCLA Administrative Management Group (AMG)**—the ERRC director is now serving as an AMG board member, which has provided opportunities to explore partnerships with other departments and has facilitated increased awareness of the ERRC across the campus.