

The UC Davis Retiree Center continues to serve 8,000+ retirees from the Davis and Sacramento campuses by communicating with retirees, providing support to the UC Davis Emeriti Association (UCDEA) and UC Davis Retirees' Association (UCDRA), planning retiree programs, connecting retirees with volunteer opportunities and connecting employees with retirement planning resources.

**Fidelity individual consultations**—Fidelity's individual consultations at the Retiree Center for retirees and active employees continue to be very popular. The Retiree Center schedules appointments for retirees; employees schedule appointments online on the Fidelity website.

**Quarterly campus tours**—the Center's quarterly tours of campus venues, open only to UCDEA and UCDRA members, also continue to be very well-received. Several retirees have joined one or the other association in order to participate in the tours. Forty-five retirees took participated in two different tours of the UC Davis Botanical Conservatory in November and twenty retirees toured the Institute for Regenerative Cures in March.

**Day trips**—day trips continue to be another popular Center offering. Fifty retirees participated in a trip to "Exploratorium After Dark" with dinner at the Fog Harbor Fish House in San Francisco.

**Open Enrollment**—the Retiree Center supported the Health Care Facilitator Program (HCFP) events for Open Enrollment in the fall, including assisting with HCFP educational presentations at the Davis and Sacramento campuses and coordinating two full days of HCFP retiree help desks at the Retiree Center.

**Transitioning to Retirement class series**—this four-week class series is held each winter quarter for employees within five years of retirement. Topics included the UC Retirement System pension income options, survivor options, etc.), Social Security, retiree health and welfare benefits, financial planning for retirement and work/life transitions. Separate sessions are offered for staff and faculty. This year we had 180+ staff participants and 50+ faculty participants. Next year we will expand to a larger classroom and add sessions at the Sacramento campus as well as the Davis campus. See the class descriptions on the back side of this report.

**Communications**—the Center continues to send weekly email updates to the 2,500+ retirees for whom we have email addresses and quarterly brief bulletins to retirees for whom we do not have email addresses. The *CenterNews* printed newsletter was eliminated this year without any negative feedback.

**New initiatives**—The Center continues to work with the Retiree Center Advisory Committee, the UCDEA and the UCDRA on two new initiatives:

- Increased programming and outreach for health system retirees—the UCDEA is taking the lead and the Center is playing a supporting role in this initiative.
- Support services for widowed retirees—the Center formed a focus group of widows and widowers to brainstorm ideas for offering additional services or support to widowed retirees and surviving spouses of retirees. With input from the group, the Center has completed several projects:
  1. A condolence card with a photo of the UC Davis Arboretum on the cover. The Center director will send a handwritten note when we hear of a death of a retiree or a spouse/partner of a retiree.
  2. A booklet titled "After the Death of a Loved One" that includes a checklist of items to take care of after the death of a spouse or partner. This booklet, which will include contact information for resources unique to UC retirees as well as general resources, will be made available at Center events and will be sent with the condolence card when we hear of the death of a constituent.
  3. Bookmark of contact information that is needed after the death of a loved one.

**Sponsorships**—The Center has secured sponsorships from two different retirement communities. One of the communities will donate catering for the fall meeting and the retiree resource day. The other community will provide catering for the new retirees reception and pay for the printing and mailing of the Retiree Center calendar. In exchange, the communities receive recognition and publicity for their events.

# Transitioning to Retirement

The road to retirement, while filled with excitement, can sometimes be unexpectedly bumpy. “Transitioning to Retirement,” with separate sessions for UC Davis faculty/academics and staff, will provide valuable information and tools for developing a successful strategy for retirement. Topics will include UC pension options, retiree health benefits, Social Security, wellness in retirement, budgeting and financial considerations and work/life transitions. It is recommended that participants register for the entire 4-week series, however each session is available for individual registration.

Workshop leaders will include UC Davis staff and faculty and representatives from retirement-focused organizations. “Transitioning to Retirement” is a joint project of the UC Davis Retiree Center and the Office of the Vice Provost-Academic Personnel with support from the Benefits Office, Academic and Staff Assistance Program and Staff Development and Professional Services.

All sessions will be held at the Walter A. Buehler Alumni Center on the UC Davis campus. Sessions for staff will be scheduled in the mornings, 9 a.m. – noon, and for academics in the afternoons, 1:30 – 4:30 p.m.

## Session 1: Introduction & Understanding UC Retirement Plan Income Options

*Day/Date: Friday, January 16, 2015*

This session will first provide an overview of the class series and information about retirement planning resources. The second part of this session will be an overview of the UC Retirement Plan (UCRP) by staff from the UC Retirement Administration Service Center. The UCRP provides retirees with a monthly lifetime pension or a lump-sum payout upon retirement. UCRP topics will include estimating your retirement income and determining options for survivor benefits.

## Session 2: Retiree Health Care Benefits & Social Security

*Day/Date: Friday, January 23, 2015*

The first part of this two-part session will cover a variety of topics regarding retiree health benefits including eligibility for retiree health care benefits, an overview of benefits that continue into retirement, the cost of those benefits, relocation impacts on health benefits and coordination of the UC retiree health care plans with Medicare.

The second part of this workshop will provide an overview of Social Security benefits and programs, including retirement, survivors, disability, and auxiliary benefits. The program will include some background and history of Social Security as well as some new features of the Social Security website.

## Session 3: Financial Planning for Retirement

*Day/Date: Friday, January 30, 2015*

Learn to avoid the five major risks that result from not preparing a retirement income plan—withdrawal (spending too much too soon), inflation, longevity (outliving one’s savings), medical (underestimating medical expenses), and asset allocation (having the wrong investment mix). The instructor will also review robust online planning tools that can help insure that you do not outlive your assets.

## Session 4: Work & Lifestyle Transitions

*Day/Date: Friday, February 6, 2015*

Retirement is a time of great expectations but also a time of significant change. As you ready for this next phase of life you might find it to be a challenging transition, even if you have planned for it and are looking forward to it. In the first part of this session, you will learn strategies for successfully navigating the change and thriving emotionally, socially, and intellectually. The second part of this session for staff will feature a panel of retirees who will share their insights into negotiating the transition to retirement and making the most of your retirement years. The second part of this session for faculty will feature the vice chancellor for Academic Affairs who will outline emeriti rights and privileges and discuss a variety of ways that emeriti can stay involved with the university. For both faculty and staff, this session will end with a reception where class participants can mingle with members of the UC Davis Emeriti Association and the UC Davis Retirees’ Association.