

CUCRA/CUCEA report
UCLA Emeriti/Retirees Relations Center (ERRC)
October 27 & 28, 2016

The UCLA Emeriti/Retirees Relations Center (ERRC) has experienced two major transitions in the last six months. First, Sue Barnes started working as the new Center director on Monday, April 19, just one week prior to the spring CUCRA/CUCEA meeting. Then, Jonathan Bates, who had worked as a retirement resource specialist at the Center for 6+ years, accepted a position with the UCLA Psychology Department. We are very pleased to announce that Eric Wang was hired to fill this newly vacated position and began working on Monday, October 17. Eric joins Maria Lubrano, who works 60% time as a Retirement Resource Specialist. Eric previously worked in the same position at the ERRC, from 1994 to 2005, when he left Los Angeles to move to New York for a number of years. He eventually returned to Southern California and has been working for the UCLA Human Resources Department for the past two years. Eric brings very strong computer skills, extensive knowledge of ERRC operations, and a desire to work once again with UCLA retirees.

Programs

Since April 2016, the ERRC offered the following programs for retirees:

- **First Fridays technical assistance**—every other first Friday of the month, retirees pre-register to receive one-on-one assistance with their electronic devices from a UCLA helpdesk specialist
- **Hoarding Disorders**—offered by the Semel Institute for Neuroscience and Human Behavior
- **Memory Training**—four-week workshop offered in partnership with UCLA Longevity Center
- **UCLA Botanical Tour**—offered by a professor emeritus, tour focused on the trees around Murphy Hall, one of the older buildings on campus
- **Making the Most of Social Security**—new workshop offered by Fidelity Retirement Services
- **Estate Planning**—offered by an ARAG-member estate planning attorney
- **Understanding Bonds and the Bond market**—offered by University Credit Union

The ERRC initiated online event registration for all of its events in May. Retirees have responded enthusiastically, with 80 – 90% of registrations now being made online. The Center also began sending electronic evaluative surveys at the conclusion of every program. These surveys have resulted in many good suggestions to help us improve future programs.

In addition to the workshops, the ERRC has recently added two additional services for caregivers and widows/widowers:

- A twice-monthly caregivers' support group (in partnership with the Emeriti Association)
- Outreach via telephone to offer assistance and support to recent widows/widowers

UCLA Retirees' Association (UCLARA) and UCLA Emeriti Association

In her first six months on the job, Sue met individually with the majority of the association board members to obtain their individual perspectives about the ERRC as well as the associations and to ask for their suggestions for improvements or enhancements. Sue presented a summary of suggestions from the UCLARA board members at the UCLARA retreat. Further discussions will occur at a collaborative planning meeting scheduled for November 1, with the goal of determining goals and action steps for the coming year, primarily in the areas of communication, programming, outreach to current employees and support for association initiatives.

Database

In cooperation with the two associations, the Center is exploring options for an improved database. Sue has explored the possibility of combining with the Alumni Relations database, but unfortunately that is not a possibility at this time. The next step will be to research alternative options, including enhancing the current database or purchasing/developing a new system.

Partnerships

In addition to meeting individually with board members, Sue, Maria and/or Jonathan met with several different campus departments, affiliated organizations and community organizations to discuss potential collaborations.

Campus department meetings have included Human Resources, the Parking Office, Alumni Relations, Osher Lifelong Learning Institute (OLLI), Campus Recreation, the *BruinCard* Office, Bruin Online, the Healthy Campus Initiative, the Longevity Center, the Gift Planning Office, Staff Assembly, the UCLA and UCLA Medical Center volunteer offices, the Easton Center for Alzheimer's Disease Research and the 50-Plus Program. Two early results of these meetings have been:

1. Improvements to the Retiree Ride Card privileges offered by the Parking Office
2. A partnership with Alumni Relations, whereby they will provide online event registration/payment services to the retirees' association (they have already been providing this service for the emeriti association dinners)

Affiliated-organization meetings have included Belmont Village Retirement Community, the Faculty Center, the Faculty Women's Club and Fidelity Retirement Services.

Community organization meetings have included L.A. Works, CASA L.A., P.S. Arts and Encore. Each of these community organizations offer volunteer opportunities that might be of interest to retirees. Several ideas have emerged from these meetings and will be discussed further in the upcoming collaboration meeting to decide which projects to pursue in the coming year.

Communications/outreach

The ERRC e-newsletter has been expanded to include more news, campus and community events and listings of volunteer opportunities that might be of interest to retirees. In the next couple of months, we will develop an integrated communication plan with the two associations that will include new outreach materials, website enhancements and improvements to our electronic and print communications. In partnership with the Human Resources Department, we hope to expand communication and outreach to active faculty and staff. Currently, most staff and faculty learn about the Center when they visit a retirement counselor. We are currently exploring opportunities to participate in campus fairs or other events and to find additional avenues to reach current employees.

Retirement planning classes

The Faculty Retirement Liaison position, which was created in spring 2015 to provide confidential consultation to faculty who are considering retirement, has been very successful. The Center supports the liaison with reporting needs and with the development of pre-retirement education workshops for faculty. A faculty retirement page has been created and it includes an unofficial guidebook written by the liaison.

Currently, the ERRC does not offer retirement planning workshops for staff, but has initiated discussions with the Human Resources Department to develop such workshops.