Emeriti/Retirees Newsletter

From the Retiree President

Happy New Year and Welcome Spring

You may have wondered why you hadn’t received a winter newsletter. In keeping with budgetary constraints and sustainability efforts, a decision was made to eliminate the winter and summer newsletters. Bulletins will be emailed out in winter and summer when we have relevant information for retirees. We hope this won’t be an inconvenience to anyone.

With that said, I want to bring you up to date with the retirees’ breakfast speaker schedule. We were treated in January to a historical talk from Prof. Emeritus Richard Oglesby on “Saving California.” Following in February was Prof. Joann Kuchera-Morin, Electronic & Computer-Generated Music, on “Visualization Meets Artistic Creation in the AlloSphere Research Facility.” In March we will have Anthropology Prof. Michael Joachim give us a presentation on “Ritual Sites of the Old Stone Age.”

The Retiree Association looks forward to Prof. Emeritus Georgio Perissinotto leading off the Spring programming at our breakfast meetings with his talk on “Keeping Time: Antique Timepieces.” We will end the season on Wednesday, June 13th with our annual BBQ at the Elks Lodge. Details and invitations will be sent out mid-Spring.

Due to popular demand, the combined Emeriti/Retiree Spring Event will take place March 16th, 3:30-5:30pm, at the Faculty Club. Prof. Christopher Newfield, English Department, will be the keynote speaker. Please see details on page 4 of the Newsletter. This is a popular event and great opportunity to greet colleagues and renew friendships in a relaxing atmosphere.

To renew or join the Retirees Association, see the enclosed 2012-13 membership dues notice. If you have not had our annual BBQ at the Elks Lodge. Details and invitations will be sent out mid-Spring. Due to popular demand, the combined Emeriti/Retiree Spring Event will take place March 16th, 3:30-5:30pm, at the Faculty Club. Prof. Christopher Newfield, English Department, will be the keynote speaker. Please see details on page 4 of the Newsletter. This is a popular event and great opportunity to greet colleagues and renew friendships in a relaxing atmosphere.

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UC Budget FAQs
How the state's budget decisions are affecting UC students, their families, faculty, staff and the people of California was the subject during a recent teleconference hosted by Larry Salinas, Associate Director of Institutional Relations and Advocacy, UCOP, with UC budget chief Patrick Lenz.

Some issues addressed during the hour-long briefing were: the state’s percentage of UC operating budget in 2011-12 and 2012-13; how UC is handling a mid-year $100 million state budget cut; whether UC campuses could be closing; UC as public vs. private; whether UC must begin reducing services (fewer classes, fewer faculty, etc.); and finally, where do we go from here, and how does UC marshal its alumni, parents, staff and students to get the funding that's needed?

To view all Q&A go to: http://ucforcalifornia.org/uc4ca/home/Lenz
You can also download the PowerPoint slides from the teleconference at: http://www.universityofcalifornia.edu/news/2012-13_uc_budget_advocacy_conf_call_rev-do.pptx

Larry Salinas, UC Advocacy [interact@ucop.edu]

2012-13 Emeriti/Retiree Associations Membership Dues Form see last 2 pages of Newsletter
In this issue of the Emeriti/Retiree Newsletter you will find your Emeriti Association and Retiree Association dues form.
Please read the RETIREE (Retired Staff) or the EMERITI (Retired Faculty) membership form below for details, and renew - or begin - your membership today!

2012-13 Emeriti/Retiree Associations Membership Dues Form

Reminders...

Same Monthly Benefit Check, New Look
UC recently hired a North Carolina vendor to print monthly benefits checks, direct deposit statements and annual tax statements.
As a result of this change, these documents may look different from those you previously received. In April, the new vendor will begin printing benefits checks and direct deposit statements for those not viewing them online. If you have questions you can call UC Customer Service at 1-800-888-8267.

Direct Deposit: Fastest, Most Secure Method For Pension Benefits
If you are receiving your monthly UC retirement benefit via paper check, consider switching to direct deposit. Direct deposit is faster and more secure than regular mail delivery; funds are deposited immediately and on time.
UC has just made it easier for you to switch to direct deposit - in January, UC launched a new application that enables you to sign up for direct deposit online. The application also allows you to securely change your bank account information. Simply sign in to your personal account on At Your Service at: https://atyourserviceonline.ucop.edu/ayso, select “Benefits Income” from the menu and then “Manage Direct Deposit.” Follow the steps to enter your bank account information. If you have questions about changing to direct deposit, call UC Customer Service at 1-800-888-8267.

Verification of Retirement Income & Other Information
Based on recent inquires to Human Resources, we've decided to include the below for your information:
• If you are in need of Documentation of Retirement Income, contact UCOP Customer Service at: 1-800-888-8267.
There are many additional helpful forms and information at: http://atyourservice.ucop.edu/forms_pubs/index.html.
Some examples:
UBEN 106 - Tax Withholding Election for UCPR income;
UBEN 100 - Changes to your Medical, Dental &/or Legal Plan
UBEN 160 - Direct Deposit changes
• Health Net Members – you can view, download and print your Health Net Evidence of Coverage/Certificate of Insurance online at: www.healthnet.com or call customer service at the phone number listed on the back of your Health Net ID card.
**WORKSHOP:** Medicare & UC Retiree Medical Plans

**Friday, May 4th, 10:00A – 12:00P**

UCSB Human Resources Learning Center, 3101 Student Affairs Admin Services Building

*Best parking: Mesa Parking Structure corner of Mesa and Ocean Roads*

**If you have questions** about how Medicare coordinates with your UC medical plan, this workshop is for you! We will discuss the following questions and more:

- When and how to enroll in Medicare?
- What plans are available to UC retirees on Medicare?
- What services does Medicare cover? What additional services are covered by the UC retiree plans?
- How much will the UC plan and Medicare cost? Which physicians are participating with the UC plans?
- How do the plans work? Which UC Medicare plans are available to retirees living outside of California?

**For additional information, please contact:**
Laura Morgan, UCSB Health Care Facilitator, at 805-893-4201 or laura.morgan@hr.ucsb.edu

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**Rewards for Taking Your Free “StayWell” Health Assessment!**

Take a free, confidential health assessment to learn how your lifestyle affects your health. Then take the follow-up wellness coaching. As an incentive, UC is offering $100 gift cards to retirees who complete the assessment by **June 15, 2012**, and the follow-up coaching by **Dec. 31, 2012**. Spouses and domestic partners are eligible and can receive a $50 gift card.

Retirees must be enrolled in a UC medical plan on Jan. 1, 2012 to qualify for the StayWell program.

**Kaiser Permanente:** Kaiser members are not eligible for the Staywell incentive program, however, they can participate in the Kaiser Health Assessment and follow-up program — KP Healthworks.

For more information on the health assessment programs, visit the UC Living Well website at: [http://uclivingwell.ucop.edu/](http://uclivingwell.ucop.edu/) and select StayWell or Kaiser Permanente. This site also includes local wellness activities.

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**All to Provide Evidence of Eligibility for Dependents**

All UC faculty, staff and retirees who have dependents enrolled in UC-sponsored medical, dental and other insurance plans will be asked to validate their dependents’ eligibility in a project slated to begin in February 2012. Employees and retirees who have enrolled dependents can prepare for the review in two ways:

- Review currently enrolled family members to be sure they are eligible. If you aren’t sure whether your family members are eligible, read the Group Insurance Eligibility Factsheet at: [http://atyourservice.ucop.edu/forms_pubs/checklists_fact_sheets/grp_ins_ret.pdf](http://atyourservice.ucop.edu/forms_pubs/checklists_fact_sheets/grp_ins_ret.pdf).
- Gather documents you may need to provide including marriage and birth certificates, federal tax returns, court-ordered divorce decrees, custody agreements and other documents that verify your dependents’ eligibility for UC coverage.

If you believe all of your enrolled dependents are eligible for UC insurance, you need do nothing more now. Watch for more information soon.

If you have questions, contact your local benefits office or call Customer Service at **1-800-888-8267**

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**RETIREE PRESIDENT** from page 1

The opportunity to attend one of our breakfast meetings, we look forward to welcoming new – and returning – attendees at Cody’s Café in Goleta (see page 5 of this newsletter for details). See you there.

Betty Koch
President, UCSB Retirees Association
tbkoch@cox.net

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The Emeriti/Retiree Newsletter will be sent out by EMAIL (via US Postal Service to those without email) twice annually, in Spring and Fall. For Summer and Winter, we will email “Notes”, a summary of Human Resources, Benefits, and other items of interest. Please let us know if you have any comments or concerns and submit your email address if you haven’t already, to: debra.martin@hr.ucsb.edu or call 805-893-4119
UCSB Emeriti & Retiree Associations
2012 Spring Get-Together on Friday, March 16th

We are pleased to announce the annual UCSB Emeriti & Retiree Associations 2012 Spring Get-Together! UCSB Professor Christopher Newfield, author of Unmaking the Public University: The Forty Year Assault on the Middle Class (Harvard University Press, 2008), will be giving his presentation “After the Devolution: New Visions for UC.” As always, we invite our newly retired faculty and staff (retired September 2011 to present) to attend free as our guests!

Come reacquaint with old friends and colleagues and welcome UCSB 2011/2012 Retirees into the associations, while enjoying appetizers and wine tasting. A minimal charge of $6 per person ($5 if you’ve paid your 2011/2012 Retiree or Emeriti Association membership dues) will help us cover the venue, food and wine. If you have not yet received your invitation via email or US Post let us know (below).

Where: UCSB Faculty Club
When: 3:30P to 5:30P
Date: Friday, March 16th

For more information call: 805-893-2168 or email: debra.martin@hr.ucsb.edu

Please make your $6 check ($5 for members) payable to:
UCSB Emeriti Association
RSVP by March 9th to:
Emeriti/Retiree Center
Mail Code 3160
University of California
Santa Barbara, CA 93106-3160

Professor Christopher Newfield

We all have some idea of what is happening to California's system of higher education over the last few years. A student of this process is English professor Chris Newfield. Fully versed in the UC budgetary process as a member, vice chair and then chair of UCPB (Senate UC Planning and Budget Committee) he has put some of his ideas in a new book entitled "Unmaking the Public University".

Chris was able to draw from several white papers written while on UCPB. In 2006 he wrote with our own Senate Chair Henning Bohn 'Current Budget Trends and the Future of UC' and in May 2008 he authored 'The Cuts Report' detailing the effects of major budget reductions to UC. Reviewers for the paperback edition last year said: “This is a very interesting book on a very important subject: the reduced funding (over multiple decades) for public higher education.” Another said "... this is the single most useful analysis of the conditions in which we find ourselves that I have read." And another, "Newfield also lays a foundation for a re-making of the university, ...not in the usual fix-it mode, but in providing a comprehensive understanding of the problems and how they arise.” Come and hear Chris on March 16th.

Fidelity Classes for UCSB

3/8/12 at 1:15P - Building a Portfolio for Any Weather: This class explains the role of asset allocation and diversification when choosing investments for your UC Retirement Savings Program accounts. Learn to recognize the characteristics of the three asset classes, identify an appropriate target asset mix based on your situation, and understand how and when to adjust.

3/8/12 at 2:15P - Establishing and Maintaining an Estate Plan: This class will help you understand key tools for estate planning. Learn the importance of preparing an estate plan and be able to recognize the benefits of planning and the dangers of waiting. You’ll also learn about tools and resources that can help you take the next step.

3/20/12 at 1:15P - Designing a Financial Roadmap: This class teaches how to build a financial roadmap that can help you navigate all your savings needs. You’ll learn how to plan for retirement while establishing non-retirement goals and savings options. You’ll also review ways to protect your assets.

Reservations for the workshops can be made by calling 1-800-642-7131. You may view the complete workshop schedule for the Winter Quarter at: http://atyourservice.ucop.edu/employees/retirement_savings/ret_ready_wkshp.html

View the new Course Catalog and UC Focus at: http://www.ucfocusonyourfuture.com/

For your convenience, and for those unable to attend in person, fully recorded versions of these workshops are available by logging onto your Fidelity NetBenefits account at: http://www.netbenefits.com.
Paper Direct Deposit Statements Discontinued

Beginning July 1, 2011, UC discontinued paper Direct Deposit statements to retirement benefit recipients. The last paper statement was mailed in late June. The decision to eliminate paper statements is both a cost-savings measure and in keeping with the university’s sustainability efforts. You can view and print your monthly income statements on At Your Service Online (sign in at http://atyourservice.ucop.edu and select “Benefit Income Statement” under “Retirement & Savings”). Statements are available by the 1st of each month and up to 18-months worth of statements are available at all times. If you have a need to continue receiving your Direct Deposit statement by mail, you will be able to elect to receive a paper statement by signing in to http://atyourservice.ucop.edu (choose “Select Delivery Method” within “Benefit Income Statement”) or by contacting Customer Service at: 1-800-888-8267.

Retiree Association
Annual BBQ & Raffle

Our annual June BBQ is on Wednesday, June 13th at 11:30A. Be ready for socializing and a delicious BBQ in the Elks Lodge picnic area. Paid members of the Retiree Association are invited to attend this fun potluck event FREE. We will have tri-tip and chicken to compliment your wonderful side dishes – invitations will be coming shortly. Your invitation will direct you to make reservations by calling or emailing Betty Koch, at 805-968-5568 or tbkoch@cox.net no later than June 6th.

This is always a fun event which includes a raffle along with great food and friends. We look forward to seeing you there!

Retiree Breakfast Meeting Schedule

Meet on the third Wednesday of months September thru May, 9AM at Cody’s Café, Hollister/Turnpike. Join us for an interesting meeting and a chance to win a free breakfast!

2012

Mar 21 – UCSB Anthropology Prof. Michael Jochim: Ritual Sites of the Old Stone Age

April 18 – UCSB Prof. Emeritus Giorgio Perissinotto: Keeping Time: Antique Timepieces

May 16 – Winemaking

June 13 – Retiree Assoc. Membership BBQ

(No meetings in July or August)

Topics and guests are subject to change, we will do our best to keep you informed

In Memoriam

John C. Beowulf
Biological Sciences
Retired 2004

Martin Bojorquez
Ortega Food Service
Retired 2008

Felice “Bill” Bonadio
History
Retired 1994

Patricia A. Breyman
Creative Studies
Retired 1997

Clayton A. Burnham
Library
Retired 2006

Bonnie Castellanos
Purchasing
Retired 2007

Jack G. Ceder
Math
Retired 1993

Patricia Gebhard
Library
Retired 1991

Stanley L. Glenn
Dramatic Art/Dance
Retired 1988

Stanley W. Haney
Janet Horton
Budget & Planning
Retired 1993

Barbara J. Kuhn

George E. Love

Enrique Martinez-Lopez
Spanish & Portuguese
Retired 1993

Darleen M. O’Donnell

Bette B. Shaver
Registrar’s Office
Retired 1988

Shirley J. Russell
Psychology 1997

Paul J. Talaugon
Chemistry
Retired 2005
Emeriti Association Officers (2011-2012)

President: Betty Koch
Vice President: Shirley Dunbar
Treasurer: Irene Pearce
Membership Chair: Bob Price
Program Chair: Judy Klinge
CUCRA Rep.: Tippi Lawrence

Emeriti Association Officers (2011-2012)

President: Doug Morgan
Vice President: OPEN
Secretary: Janice Cloud
Treasurer: Doug Morgan
CUCEA Rep.: Bill Ashby
CUCEA Alt.: OPEN

Ex Officio
Barbara Anderson

Members-at-large
Marilyn Benson
Donn Miller
Donna Saar

Board Members
David Chapman
Alice Condodina
Paul Hernadi
William A. Prothero
Tonia Shimin
Barbara Voorhies
Carl Zytowski

See below for Emeriti Association & Retiree Association Membership Dues Forms
Dear Colleague,

The UCSB Emeriti Association values each retired faculty member and partner. Your support as members of the Association is important to our input on system wide issues that impact all of us. Whether you are remaining a member or joining us for the first time, it is my pleasure to welcome you to another interesting year. Please return this form with payment to the Emeriti/Retirees Center (information below).

NAME:  _______________________________________________________________________

PARTNER/SPOUSE:  ____________________________________________________________

PHONE:  ______________________________________________________________________

EMAIL:  _______________________________________________________________________
    *(Please ensure that we have your email address on file in order to receive each periodic email report)*

ADDRESS:  ____________________________________________________________________
    __________________________________________________________________________

_____  I have enclosed my $10.00 annual membership dues

_____  I am 85+ years old
    *(Retired Faculty who are 85 years old and older are exempt from paying annual dues)*

*Given the success of the Emeriti Association awarding scholarship awards at the May 2011 Undergraduate Research Colloquium poster session, I encourage you to add a few dollars to the Emeriti Scholarship fund to be used this year.*

_____  I support the Emeriti Scholarship fund with a further contribution of  $___________

Please make you check payable to: **UCSB EMERITI ASSOCIATION** and mail it with this form to:

**UCSB Emeriti Association/HR**  
**Mail Code 3160**  
**University of California**  
**Santa Barbara, CA 93106-3160**

Thank You,

W. Douglas Morgan, President  
UCSB Emeriti Association
Dear UCSB Retiree,

It is time to join or renew your membership with the UCSB Retiree Association. As always, your support is very important.

In being an Association member, you have the satisfaction of knowing a portion of your $10 fee goes toward annual scholarships for a deserving student. The Association funds a $1,000 scholarship, awarded by the Scholarship Foundation of Santa Barbara [http://www.sbscholarship.org/], in addition to $175 donated annually to the Town & Country Women’s Club for a scholarship that enables a student to attend a Hugh O’Brian leadership conference. [http://www.hoby.org/]

**Also of importance**, a portion of your membership fee goes to CUCRA (Council of University of California Retirement Associations), the voice of UC retirees. CUCRA represents the UC retiree community, and is an advocate for retiree benefits and privileges for retirees (see more about CUCRA in your Spring Emeriti/Retiree Newsletter or at [http://hr.ucsb.edu/emeriti/retirees_outreach_and_advocacy.php](http://hr.ucsb.edu/emeriti/retirees_outreach_and_advocacy.php)).

In becoming a member, you will also be invited to participate in voting-in your Association board officers at the annual BBQ held in June, and serving on the board. In addition, the Association sponsors monthly meeting offering a variety of interesting speakers. Events this year will be listed in the quarterly newsletter and online at: [http://hr.ucsb.edu/emeriti/retirees_current_events.php](http://hr.ucsb.edu/emeriti/retirees_current_events.php).

To assure getting credit for your payment, please return the below stub with your remittance.

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**UCSB Retirees Association Statement**

If your spouse/partner (with same address) is a UC retiree, the $10 dues covers membership for you both.

<table>
<thead>
<tr>
<th>Date Due</th>
<th>Description</th>
<th>Dues Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2012</td>
<td>2012-13 Dues</td>
<td>$10.00</td>
</tr>
</tbody>
</table>

Your Name: ____________________________________________

Address: ________________________________________________

City, State, Zip: _________________________________________

Phone: __________________________________ Email: __________

Please make checks payable to **UCSB Retirees Association** and mail to:

*Bob Price, Membership Chairman, 484 Toro Canyon Road, Santa Barbara, CA 93108-1634*