

new dimensions



2024 cost-of-living adjustments for UCRP benefit recipients

University of California Retirement Plan (UCRP) and UC-PERS Plus 5 Plan benefit recipients, including those receiving survivor and UCRP disability income, will receive a cost-of-living adjustment (COLA) effective July 1, 2024. The increase will appear in checks paid on August 1.

Effective July 1, 2024, the COLA rate is 2.00% for those with a retirement date on or before July 1, 2023.

The COLA for UC-PERS Plus 5 benefit recipients is also 2.00% (set as the same as the COLA for UCRP benefit recipients with a retirement date of October 1, 1991).

UCRP benefit recipients are eligible to receive a COLA if they have been retired one full year by July 1. Therefore, those members whose retirement or disability date is after July 1, 2023, are not yet eligible to receive a COLA.

How the COLA is calculated

The 2024 COLA is based on the 2.85% average increase in the Consumer Price Index (CPI) measured from February 2023 to February 2024 for the Los Angeles and San Francisco metropolitan areas.

The UCRP COLA formula generally matches the annual increase in the CPI up to 2%, plus 75% of the CPI increase in excess of 4%, to a maximum COLA of 6%. This year, all benefit recipients will receive a COLA that is less

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Retiree associations sustain sense of community

After they end their long careers, some retirees like to stay connected to their UC campuses.

They volunteer, mentor, attend lectures and social events, stay abreast of university-wide topics, and advocate for their fellow retirees.

“Each of the campuses, except Merced, have emeriti and retiree associations, open to all, that allow the opportunity to sustain one’s association with the university and a sense of community,” said Jo-Anne Boorkman, chair of the Council of UC Emeriti Associations (CUCEA).

These campus retiree associations are joined together through CUCEA and the Council of UC Retiree Associations. They meet semi-annually with UC Office of the President leaders to discuss mutual problems and possible solutions.

Judith Tuch, who retired from UCLA in 2002, became involved in her campus association after a former colleague asked her to help with an arts and crafts show. Tuch, formerly executive director of information management in University Relations, went on to chair the retiree association’s program committee.

“After attending a couple of programs, I realized how much fun it was to reconnect with people I have worked with, and to stay involved with UCLA,” she said. “More importantly, I heard about all of the advocacy the retirees association do for our health care and benefits.”

Now, Tuch is president of the UCLA Retirees Association, busy planning and leading programs.

“A wonderful event that has been offered every other year is an invitation to new retirees to an event at the chancellor’s home,” she said. “It’s always special

Transitioning to Medicare at 65

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Turning 65 years old and transitioning to Medicare?

Members covered by UC medical plans should receive communication from the UC Retirement Administration Service Center (RASC) a few months before their 65th birthday to prepare them for Medicare enrollment and to transition to UC Medicare plans.

Go to ucal.us/aboutmedicare (“Understanding Medicare” on UCnet) for more information.

UC medical plans will hold webinars or have pre-recorded presentations with invaluable information to help you transition to your UC Medicare partner plans.

For those living outside of California who will be meeting the eligibility requirements for the Medicare Coordinator Program, refer to the Via Benefits for the Medicare Coordinator Program (MCP) section in this article.

CORE and UC Care Members (administered by Anthem Blue Cross)

UC Medicare PPO plan is the Medicare partner plan. Watch a pre-recorded presentation by visiting www.uhealthplans.com/commercial/transitioning-to-medicare. No meeting registration is required.

UC Health Savings Plan members (administered by Anthem Blue Cross)

Members have two Medicare plan options to transition into:

- UC Medicare PPO plans – watch a pre-recorded presentation by visiting www.uhealthplans.com/commercial/transitioning-to-medicare. No meeting registration is required
- UC Medicare Choice plan - watch a pre-recorded 2024 Education presentation by visiting retiree.uhc.com/uc. No meeting registration is required.

Kaiser Permanente HMO members

Kaiser Permanente Senior Advantage plan is the Medicare partner plan. Attend a live online presentation or view the recorded, on-demand version. Registration is required. Visit ucal.us/ksa, scroll down to “Learn more,” select the webcast(s) and register.

UC Blue & Gold HMO members (by Health Net)

UC Medicare Choice, a United-Healthcare® Group Medicare Advantage (PPO) plan, is the Medicare partner plan for the UC Blue & Gold HMO plan. Watch the UC Medicare Choice pre-recorded 2024 Education presentation by visiting retiree.uhc.com/uc. No meeting registration is required. Also refer to the article on UC Medicare Choice 2024 webinars

(bottom of this page) for the Medicare Made Clear presentation in September 2024.

Via Benefits for the Medicare Coordinator Program (MCP) for members living outside of California

This section is for covered families on UC medical plans who are living outside of California with the youngest family member turning 65 years old within 12 months while meeting all other MCP eligibility requirements. You can find more information in the article on page 2 of the February 2024 New Dimensions (available at ucal.us/newdimensions), “For retirees and covered family members living outside of California and turning 64 or older this year.”

Visit ucal.us/medicarecoordinator to review the program’s eligibility requirements and how to transition to Via Benefits.

Visit my.viabenefits.com/uc and scroll to “Videos” to understand how the Medicare Coordinator program works (available 24/7).

UC Medicare Choice 2024 ‘Lunch and Learn’ Webinars

UnitedHealthcare will launch its 2024 “Lunch and Learn” online presentations to provide UC Medicare Choice members the opportunity to learn about added value benefits beyond Medicare and ask questions. Presentations will be offered May through September. Spouses, family members and caregivers are welcomed to attend.

Upcoming presentations are as follows:

Wednesday, May 22, 12 – 1 p.m.

“Get After Healthy – A Guide to Well Being, Fitness and Rewards” will provide information regarding UnitedHealthcare’s programs — such as Renew Rewards, the free Renew Active gym membership, 24/7 Nurse Support, the Personal Emergency Response System, and HouseCalls.

Wednesday, June 19, 1 – 2 p.m.

“Advanced Illness & Care Planning” will provide information regarding topics that many families find difficult to discuss, such as palliative care, hospice, and directives.

Wednesday, July 24, 12 – 1 p.m.

“Emotion Care - Taking Care of your Mental Health” on accessing behavioral health benefits and unique benefits with the UC Medicare Choice plan.

Wednesday, August 28, 12 – 1 p.m.

“Get After Healthy – A Guide to Well Being, Fitness and Rewards,” a repeat for those who missed the May meeting, or for those who want to participate a second time.

Wednesday, September 18, 12 – 1 p.m.

“Medicare Made Clear – A Guide to Medicare” will provide information to help you understand your options once becoming entitled to Medicare and to feel confident about choosing coverage based on your needs.

For additional information and to register for one or more of these webinars, visit: uhcvirtualretiree.com/uc/meetings or retiree.uhc.com/uc and scroll to “Virtual Education Center.”

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than the 2.85% increase in the CPI. Therefore, retained purchasing power for all UCRP benefit recipients will decrease from last year.

Adjustment to HAPC for inactive UCRP members (“Inactive COLA”)

When inactive UCRP members retire or request a lump sum benefit payment, their benefit is calculated based on the Highest Average Plan Compensation (HAPC) as of their separation date. For inactive members who retire with 1976 Tier service credit or who were Safety or Tier Two Members, their HAPC is increased by the lesser of 2% or the actual increase in the CPI, compounded annually, from the separation date to the date the inactive UCRP member retires or requests a lump sum benefit payment.

Effective July 1, 2024, the Inactive COLA for these inactive members is 2.00% for those with a separation date on or before June 27, 2024.

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to see new retirees and tell them about the associations.”

“We are working on a joint emeriti and retiree art show which will be held in May at the faculty club” said Tuch. “Finally, we just had the tenth anniversary solicitation for our endowment which funds staff development scholarships. We feel very strongly about being able to support staff in career development across the campus and this is one way we will make sure this happens in the future.”

G. Steve Martin, emeritus professor of cell and developmental biology at UC Berkeley, retired in 2016 and now serves as president of the campus’s emeriti association.

“As I participated in association events, I learned of the many activities that benefit and support emeriti, such as research grant administration and the Legacy Project, which conducts video interviews of emeriti,” he said. “In addition, I learned of the important work on health benefits and retiree services carried out by CUCEA and the Retiree Advisory Committee.”

“At Berkeley), all emeriti and their spouses or partners are automatically members of the Berkeley Emeriti Association and may participate in association events,” said Martin. “In addition, emeriti may join our affiliated organization, the Emeriti Academy, which fosters interdisciplinary collaboration and offers opportunities for continued involvement in the university’s mission.”

They may also represent emeriti interests at the departmental level. “Together with the campus Retirement Center, these groups offer opportunities to learn, contribute, socialize and advocate,” said Martin.

Jill Halvaks, president of the UC Irvine Retirees Association, retired in 2013 as acting dean of

students, and soon joined her association after some urging by colleagues.

“About three months into helping the association I realized how little I knew about its value to retirees,” she said. “It opened my eyes to many things I had never thought about other than the ‘fun’ events. My retirement journey had no problems, so I just assumed it was the same for others.”

“It’s all about giving back, whether it’s time, talents, or money,” she said. “Supporting scholarships for staff and new students, giving to an underfunded campus program, and being involved in things to keep busy and connected is a real joy. It’s nice to see former colleagues and get to know them on a different level.”

Emily Galindo, current president of the UC Davis Retirees Association, joined her group soon after retiring as interim vice chancellor of student affairs in 2020.

“I got a phone call from the then president asking if I might be interested in joining the board as the communications officer,” she said. “I admit I’m a volunteer at heart and I felt that if I could be helpful, that was something I wanted to do.”

“After learning more about the way that the association works to advocate for retirees, maintains a strong relationship with campus leadership and has influence with the Office of the President, I was even more convinced it was a good use of time and energy,” said Galindo, who worked at UC Davis for 36 ½ years.

“Many individuals who retire from the University, especially if they have many years of services, want to stay connected to the campus,” she said. “The retiree association is one more avenue for staying

involved. One can meet other retirees and attend the various programs and events.”

“Last year we hosted a session on Social Security that was very well attended (via Zoom) and answered many of the questions that you just don’t know about even though you may already be eligible to receive benefits,” she said.

“When you retire from UC, there will be many things that you will want to do with your newly found spare time. Getting involved with your campus retiree association is just one way to stay connected with the place and with fellow retirees who share part of your career story.”

To join a campus emeriti or retiree association, you need not be from that campus. If you have moved away from your home campus, you are welcome to affiliate with the association near where you live. See page 5 of New Dimensions for contacts at each UC campus or national laboratory.

Retiree Centers are valuable, too

In addition to emeriti and retiree associations, Retirement Centers at eight of 10 UC campuses offer a variety of resources and services, including retirement and benefits counseling and information, campus lectures and social events. They also work with and link retirees to the local retiree associations.

UC Merced and UCSF do not have official retirement centers, but they have staff who are resources for retirees. See page 5 for a list of Retirement Centers and contacts for retirees.



Left photo, Sandra Norberg, UCSF retiree, in the Hello Kitty Shinkansen (bullet train) in Japan. Right photo, David and Sue Barnes, in an Iceland hot tub.

Bringing home a world full of memories

UC retirees are making memories around the world on UC Retirees Travel group tours. Several UC Retirees Travel escorts recently reminisced about their favorite memories.

Dolores Dyer, UCLA retiree: “I was up early for breakfast outside at our South African hotel in the jungle. I was alone except for the monkeys in the overhanging trees. A female monkey with her baby suddenly jumped on my table. I welcomed them to join me for morning coffee.”

Sandra Norberg, UCSF retiree: “In Japan, we were waiting for the Shinkansen (bullet train). The train arrived to shrieks of joy — it was the Hello Kitty Shinkansen. Who knew there was such a thing? The adjacent car was selling Hello Kitty memorabilia, so several of us bought gifts.”

Sabina White, UCSB retiree: “In New Zealand, I toured the Weta production studio, used by Peter Jackson for The Hobbit films. The movie swords were plastic but looked like metal. The store sold actual swords that are so finely crafted the blacksmith was knighted. With a price tag of \$25,000, I did not bring a sword home!”

Elise Woods, UC Berkeley retiree: “In Puerto Vallarta, I participated in the annual baby sea turtle release to increase the hatchlings’ survival rate, as only 1-3% reach adulthood. As the babies traversed the beach, I scooped one up and carried it to the sea. It was a magical experience.”

Vickie Leow, UCSF retiree: “As I stood in awe of the Perito Mareno Glacier in Patagonia, I

reveled in the quiet, punctuated by occasional cracks as large ice chunks broke off and plummeted into the water. It was an amazing sight that must be experienced to be appreciated.”

Sue Barnes: UCLA retiree: “In Iceland, we enjoyed several soaks in geothermally heated outdoor hot tubs at the swimming pool complexes that grace even the smallest towns. We loved experiencing this integral component of the culture where townspeople meet up daily with friends and family.”

Retired staff and faculty as well as family and friends are invited to make memories on UC Retirees Travel group tours. Visit ucra.ucsd.edu/travel/ to see details about upcoming trips.

Fidelity representatives at UC campuses

As a UC retiree, you can take advantage of the same free financial planning resources that are available to UC employees via UC-dedicated Fidelity Workplace Financial Consultants.

Topics and services include legacy/estate planning, required minimum distributions, tax efficient saving and spending, annual financial reviews, investment mix, and charitable giving.

Below are the Fidelity representatives for campuses.

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UCAN

Project reflects love of gardening, music



Stanley Trimble
Professor of Geography, UCLA

When my wife, Alice, and I retired, our project and activity were to create a 200-acre garden in the English landscape style. We named it the "Garden of American Music," which is near Bethel, Tennessee.

It honors Western norms of beauty, and both familiar and little-known American composers and arrangers of art music: classical, jazz, movie scores, and "The Great American Songbook." Typical features include ponds, cascades, bridges, ruins, arches, and pavilions.

Inspiration for the garden itself came from our early residence and travels in Europe back in the mid-1960s. Later, I taught geography and hydrology full-time at UCLA starting in 1975 and retiring in 2011, although I taught part-time for three more years.

Starting with an almost derelict farm and house we bought back in 1978, summers and holidays were spent in Tennessee working on the house and grounds. With the limited available worktime, restoring the house took 10 years and later efforts went mainly into the grounds.

Maintaining the place now is a full-time job and at age 83, we continue to do most of the work ourselves. The outside physical activity also keeps us in reasonably good health and mental outlook.

The project is for personal satisfaction only; it is completely non-commercial and visitors are welcome. In 2021, we prepared a booklet on the project, *Visions of Arcadia*, pdfs of which we will gladly send to anyone interested. Please contact us at trimble@geog.ucla.edu.

Conversing about climate crisis



Stephen Weldon
Director of Leadership Gifts, UC Santa Cruz

After retiring in 2014, I became concerned about what I see as a growing national crisis: people are increasingly unable to have conversations surrounding difficult topics, such as climate change and politics.

Using climate change as an example, I developed a guide for people to most effectively, and enjoyably, have potentially challenging conversations about any topic. This strategy evolved from my legal experience (UC Davis Law '76) and my multigenerational family succession interviews and planning. My resulting Climate Communications TrainingSM and www.envisionclimate.org enable people to most effectively communicate the gravity, urgency and options available for taking action on climate change or other pressing issues.

In short, I guide others to use and prioritize various types of questions and strengthen crucial communication skills. The goal is to create a situation where the person that you engage with understands that you seek to learn about them rather than just assert your own opinions.

I've been invited to share this strategy with groups ranging from students and community groups to public and private sector professionals. I'm honored to volunteer these trainings with no fee.

Share Your Stories

Doing something interesting in your retirement or at your UC Retirement Center? Tell your story in New Dimensions. Email us at NewDimensions-L@ucop.edu.

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Email: NewDimensions-L@ucop.edu

For benefits questions:

RASC:
800-888-8267 (7 a.m. – 4:30 p.m., PT)

UCRAYS:
retirementatyour.service.ucop.edu

UCnet:
ucnet.universityofcalifornia.edu/retirees/index.html

Want to go green?

Consider signing up for the electronic version of *New Dimensions*. Go to retirementatyour.service.ucop.edu, select "Edit Profile," click "Communication Preferences," under "Communication Type," go to "Newsletters and other General Information" and select "Email."

Emeriti/Retiree Association Contacts

UC's retiree and emeriti associations and retiree centers primarily use online communications to interact with retirees and emeriti about services and programs. Use the listings below to establish an email communication relationship with an association and/or center. If you have moved away from your home campus, you are welcome to affiliate with the association or center near where you live.

Office of the President/Regents

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UC Merced retirees contact

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Phikoun Khamchanh
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UCSF retirees contact

Louis Gutierrez – UCSF
louis.gutierrez@ucsf.edu

Retirement Center Contacts

UC Berkeley Retirement Center

Cary Sweeney, Director
ucbrc@berkeley.edu
510-642-5461

UC Davis Retiree Center

Juliane M Crowley, Director
jmcrowley@ucdavis.edu
530-754-7105

UC Irvine Center for Emeriti and Retirees

Jeri I. Frederick, Director
emeriti@uci.edu or retirees@uci.edu
949-824-7769

UCLA Emeriti/Retirees Relations Center

Ayesha Dixon, Director
adixon@errc.ucla.edu
310-825-7456

UC Riverside Retirement Center

Cristina Otegui, Director
retirees@ucr.edu
951-827-5008

UCSD Retirement Resource Center

Vania Bailon, Director
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858-534-4724

UC SB Emeriti/Retiree Center

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UC Santa Cruz Retiree & Emeriti Center

Christy Dawley, Coordinator
rec@ucsc.edu
831-502-8202

RASC updates: Expanded phone hours and help transitioning to Medicare

The UC Retirement Administration Service Center (RASC) continues to improve service to retirees, with new hours and options for support.

Good news for early birds!

RASC phone lines are open from 7 a.m. to 4:30 p.m., Monday through Friday. Use the menu options for the most efficient service — select option “1” to unlock your UCRAYS account or reset your password.

Medicare office hours and webinars

The transition to Medicare can be complicated — RASC is here to help, with weekly office hours and monthly webinars to ask questions and get answers.

Registration is required, and repeat attendance is encouraged!

Every Tuesday from noon to 1 p.m. (PT): Register at bit.ly/RASCWeeklyMedicare for a session with RASC to ask questions and receive support — in a group setting or in private one-on-one breakout rooms for personalized assistance.

The fourth Thursday of every month, from 10-11:30 a.m. (PT): Register at bit.ly/RASCMedicareMonthly for Understanding Your Medicare Eligibility – Medicare Presentation with Q&A, an educational webinar led by RASC subject matter experts. Join a public question-and-answer period or ask questions in a private one-on-one breakout room.

RASC: WE'RE HERE FOR YOU

rasc.universityofcalifornia.edu

1-800-888-8267
UCRAYS help: Option 1

Survivors and beneficiaries
1-888-825-6833



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Are you moving?

To continue receiving *New Dimensions*, be sure to notify UC of your new address online: retirementatyour.service.ucop.edu or by submitting a *UC Benefits Address Change Notice*, available online at ucnet.universityofcalifornia.edu or from the Retirement Administration Service Center at 800-888-8267.

UC-paid identity theft program available to retirees

As part of UC’s commitment to the well-being and security of its community, a University-paid identity theft protection program through Experian launched April 1 for all benefit-eligible faculty, staff, and retirees.

Key features of the comprehensive identity protection for retirees and dependent children under age 18 include:

- Credit monitoring, reports and scores. Receive credit reports, scores, and real-time alerts for any changes to your credit report, helping you detect potential identity theft
- Identity theft insurance and restoration services. Up to \$1 million of identity theft insurance and 24/7 restoration services in the unfortunate event of an identity theft
- Dark web and proactive monitoring. Active scans of the dark web and many other

databases for any compromised personal information

- Device protection and online privacy. A suite of privacy tools to help defend your digital data across all your devices
- Digital financial management. Financial tools and personalized insights to help you achieve your credit and financial goals.

Enrollment is automatic, but you must set up your account to take advantage of the program. Eligible retirees should have received a welcome email from Experian with a personalized link to access the Experian portal and complete your account set-up. If you did not receive this email or can’t locate it, and would like to set up your identity protection account, please contact Experian customer service at (855) 797-0052.



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