UCnet: UCRS Advisory Board 2019 Elections

An election to fill two staff seats on the UC Retirement System (UCRS) Advisory Board is being held from May 20 to June 17.

This website provides complete information about the election including:

- An overview of the UCRS Advisory Board
- How to become a candidate for the UCRS Advisory Board, including nomination forms and guidelines
- Information on who is eligible to vote
- The latest news about the election, including background information on candidates (available mid-May) and election results (late June).

About the election

The election will be held May 20 to June 17, 2019, to select two employees (active UCRP members or active Savings Choice participants who are not members of the Academic Senate) to the UCRS Advisory Board. All active UCRP members and active Savings Choice Participants (including new Eligible Employees who are in their initial 90-day window period during which they select either UCRP/Pension Choice or Savings Choice) who are not members of the Academic Senate are eligible to vote. The elected UCRS board members will serve from July 1, 2019, through June 30, 2023.

The deadline for submission of nomination materials is May 1, 2019.

Qualifying candidates will be notified by May 13, 2019, and announced to the University community prior to the voting period, which runs from May 20, 2019, to 5 p.m. PT on June 17, 2019.

The voting process will be administered by Election-America, a third-party vendor. Employees eligible to vote will receive an email at their UC email address with a personal identification number (PIN) and a direct link to the Election-America voting site. Eligible voters who do not have a UC email

ELECTION INFORMATION

Are you eligible to vote?

¿Califica usted para votar? PDF

INFORMATION FOR CANDIDATES

Prospective Candidate Information and Instructions

Información para candidatos potenciales PDF

UCRS Advisory Board Election Rules of Conduct PDF

Reglas de conducta para la campaña PDF

UCRS Advisory Board Election Nomination Petition PDF

Petición de postulación PDF

UCRS Advisory Board Election Candidate Statement PDF

Hoja de declaración del candidato PDF

ADVISORY BOARD INFORMATION

UC Retirement System Advisory Board

Vista general de la Junta Asesora del UCRS PDF

address will be mailed a ballot and candidate statements. These voters can then choose to vote electronically from a home computer (or computer at UC libraries, Benefits Offices, etc.) or mail the paper ballot directly to Election-America.

About the UC Retirement System Advisory Board

The 11-member UCRS Advisory Board is comprised of a cross-section of the university community. In addition to the two seats held by elected staff representatives, the board includes members of the President's executive cabinet; faculty appointed by the UC Academic Senate; and representatives of the Council of UC Emeriti Associations and Council of UC Retiree Associations.

The advisory board meets three times a year to discuss issues of interest to UCRS members, retirees and beneficiaries, and shares its opinions on these issues with the UC president.

The UCRS plans include:

- University of California Retirement Plan (UCRP)
- Tax-Deferred 403(b) Plan (403(b) Plan)
- Defined Contribution Plan (DC Plan)
- 457(b) Deferred Compensation Plan (457(b) Plan)
- 415(m) Restoration Plan

News & updates

UCnet: Nomination process for UC Retirement System Advisory Board election begins March 23

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UCnet: Prospective Candidate Information and Instructions

To qualify as a candidate for the 2019 UCRS Advisory Board election, the following must be received by UC Human Resources, Retirement Policy Group, 300 Lakeside Drive, 5th Floor, Oakland, CA 94612, by May 1, 2019:

• the signed *Background Information and Candidate Statement Sheet* PDF

• the *Petition for Nomination* PDF , which must include at least 50 valid signatures of active members of the University of California Retirement Plan (UCRP) or active participants in the Savings Choice Program who are not members of the Academic Senate (see definition of Active UCRP member or Savings Choice participant in *Are You Eligible to Vote?*) and

• the signed *Rules of Campaign Conduct* PDF

You will be sent confirmation of your candidacy if all completed and signed forms above have been verified and received by the May 1, 2019, deadline. Notification will be sent to those nominees who do not qualify as candidates.

Note that this election is for two active staff (non-Academic Senate) members. As there are designated retirees on the UCRS Advisory Board, if an elected active staff member separates from service or retires, the position will be filled by the candidate who received the next highest number of votes in the most recent election, provided the candidate is an active member of UCRP or an active Savings Choice Participant and meets all other eligibility requirements.

Candidates for the 2019 election may submit a statement of 120 words maximum. Your statement, which can include biographical information, is intended to communicate to voters your qualifications for the position. While a sentence or two may be appropriate in stating why you believe your background and qualifications make you a good candidate, this statement is not intended to serve as a platform or a political forum. If your statement exceeds 120 words, you will be contacted and asked to revise the statement

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to conform with the word limitation requirements. Your statement will be posted on this website along with the candidate statements of other qualified candidates. Your statement will be posted in both English and Spanish. Additionally, a link to your statement on this website will be included in the e-ballot sent to eligible voters with a UC email address. Your statement (in English and Spanish) will also be included with the ballot mailed to eligible voters without a UC email address.

In addition to information relevant to your qualifications for the position, the statement may contain information about honorariums, memberships in professional organizations, career interests or specialization, and union affiliations. The information contained in the candidate statement is the responsibility of the candidate. Any misrepresentation in this statement may result in the disqualification of your candidacy. When you sign the *Background Information and Candidate Statement Sheet*, you are certifying that the statements made therein are truthful and accurate.

Note that for purposes of uniform presentation and for adherence to campaign policies contained here and in the enclosed materials, candidate statements are subject to editorial review. Any inclusion of external websites or web links will be removed before posting. If the edits are substantial, we will request your review of the edited version prior to publication. Finally, the notice regarding the *Rules of Campaign Conduct* specifies which election activities are permissible and those that will result in disqualification. Please review this notice carefully. Your signature verifies that you understand that these rules will be strictly enforced and that failure to abide by the *Rules of Campaign Conduct* will disqualify your candidacy.

The following employees are not eligible for initial or continuing membership on the UCRS Advisory Board:

- Employees in the University of California Office of the President who, in their job functions, are either engaged in making UCRS policy or work in a department where such UCRS policy is made;
- Employees who are engaged in providing legal advice to the University of California Retirement Plan (UCRP), the Tax-Deferred 403(b) Plan, the

457(b) Deferred Compensation Plan or the Defined Contribution Plan;

- Employees of the Offices of Internal Audit at the campuses, laboratory and the Office of the President.

Staff (non-Academic Senate) elected UCRS Board members must be from different University locations (campus, medical center or lab affiliation); therefore, in the event that two candidates from the same location hold the highest number of votes, the candidate with the most votes from that location will win one seat, and the candidate with the next highest number of votes from a different location will win the second seat.

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2019 UCRS ADVISORY BOARD ELECTION BACKGROUND INFORMATION AND CANDIDATE STATEMENT SHEET

PLEASE COMPLETE ALL INFORMATION

Name (last, first, middle initial) _____

Current University position (payroll title; if you have dual/multiple appointments, indicate each.)

_____

Location (campus, medical center or lab affiliation) _____

Email address _____

University phone number _____

Length of University service _____ years

CANDIDATE STATEMENT (MAXIMUM 120 WORDS)

The following statement must also be signed and dated to complete your application and qualify for nomination:

I certify the statements made above are truthful and accurate to the best of my knowledge. I understand that a misrepresentation will result in my disqualification from candidacy for the UCRS Advisory Board. I have read the attached Rules of Campaign Conduct and have signed the Rules of Campaign Conduct. I also understand that these rules will be strictly enforced and that failure to abide by the rules of the campaign will disqualify my candidacy.

_____ _____

Signature Date

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2019 UCRS Advisory Board Election Petition for Nomination of Candidate

Employees who are active University of California Retirement Plan (UCRP) members or active Savings Choice participants in the UC Defined Contribution Plan, and who are not members of the Academic Senate, are eligible to run as a candidate in the 2019 UCRS Advisory Board election. Employees may not run if they work at the Offices of Internal Audit at the campuses, laboratories and the Office of the President or if they work at the Office of the President and their job functions are directly engaged in making UCRS policy, work in a department where such policy is made, or are engaged in providing legal advice to UCRS.

For a valid nomination, this petition must contain the signature of at least 50 active UCRP members or active Savings Choice participants (see definition of active UCRP member and active Savings Choice participant in *Are You Eligible to Vote?*) who are not members of the Academic Senate. We recommend obtaining more than 50 signatures in the event that any signers are found to be ineligible. UC Human Resources in Oakland must receive the petition by May 1, 2019.

Submit the completed petition to:

UC Human Resources
Retirement Policy Group
300 Lakeside Drive, 5th Floor
Oakland, CA 94612-3557

We, the undersigned active University of California Retirement Plan (UCRP) members or active Savings Choice participants in the UC Defined Contribution Plan, who are not members of the Academic Senate, hereby nominate:

Name: _____

University position:

_____

University location:

_____

as a candidate for the non-Academic Senate position on the UCRS Advisory Board for the term July 1, 2019 through June 30, 2023.

2019 UCRS Advisory Board Election Petition for Nomination

Name of nominee _____

Print Last Name, First Name and Middle Initial	Signature
1.	
2.	
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17.	
18.	
19.	

2019 UCRS Advisory Board Election Petition for Nomination

Name of nominee _____

Print Last Name, First Name and Middle Initial	Signature
20.	
21.	
22.	
23.	
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37.	
38.	

2019 UCRS Advisory Board Election Petition for Nomination

Name of nominee _____

Print Last Name, First Name and Middle Initial	Signature
39.	
40.	
41.	
42.	
43.	
44.	
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2019 UCRS Advisory Board Election Petition for Nomination

Name of nominee _____

Print Last Name, First Name and Middle Initial	Signature
58.	
59.	
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2019 UCRS Advisory Board Election Rules of Campaign Conduct

In general, use of University resources to promote or advance candidacy is not permitted. Examples of permissible and impermissible activity are as follows:

PERMISSIBLE:

- Face to face contact with employees
- Mail with U.S. postage paid by candidate
- Posting flyers on bulletin boards within campus/laboratory restrictions
- Letters to the editor or published ads (at candidate's expense) in campus or laboratory news vehicles
- Participation in forums sponsored by campus groups
- Telephone calls from candidate's personal telephone after work hours
- Use of campus/lab directories to discern addresses (work or home) for mailing campaign materials via U.S. mail within campus/laboratory restrictions

IMPERMISSIBLE; VIOLATION WILL INVALIDATE CANDIDACY:

- Use of electronic mail from University computers or to University electronic mail addresses for campaign purposes, including the broadcast or posting of candidacy notice and statements. Use of University computers for campaign purposes by the candidate or by any individual, group or organization acting on behalf of a candidate is not permitted. However, election and voting materials, as well as candidate statements will be available to UC employees on the UC employee website UCnet (ucnet.universityofcalifornia.edu)
- University-provided interoffice/ intercampus mail services, or University equipment or supplies for promoting candidacy
- Misrepresentations

Candidates are solely responsible for the accuracy and veracity of statements made in the conduct of their campaign.

Questions regarding campaign conduct or about petitions not specifically noted here should be addressed in writing to:

UC Human Resources
Retirement Policy Group
300 Lakeside Drive, 5th Floor
Oakland, CA 94612

UC Human Resources will provide responses to any questions/petitions **via email** to all candidates. Every effort will be made to respond to questions in a timely manner.

The following statement must also be signed and dated in order to qualify for nomination:

I have read the Rules of Campaign Conduct and my signature below indicates that I understand that these rules will be strictly enforced and that failure to abide by the rules of the campaign will disqualify my candidacy.

_____
Signature

_____
Date

UCnet: Are you eligible to vote?

Employees who are active University of California Retirement Plan (UCRP) members, or active Savings Choice participants in the UC Defined Contribution Plan (as well as new Eligible Employees who are in their initial 90-day window period during which they select either UCRP/Pension Choice or Savings Choice) AND who are not members of the Academic Senate, are eligible to vote in the 2019 election.

Active UCRP member or Savings Choice participant

Prior to July 1, 2016, active UCRP membership was automatic and mandatory for all Eligible Employees, effective with the first day of their eligible appointment. Pursuant to the implementation of the Retirement Choice Program effective July 1, 2016, new Eligible Employees, and former UCRP members rehired as Eligible Employees on after July 1, 2016, following a tier break in service, have a 90-day window period to elect to participate in either UCRP/Pension Choice or Savings Choice. If no primary retirement plan election is made within the 90-day window period, the Eligible Employee defaults to UCRP/Pension Choice. An Eligible Employee is an employee with an appointment that is at least 50 percent time or more on a fixed or variable basis for one year or longer.

Employees with limited appointments, employees in contract positions, employees in “noncareer” positions at the Department of Energy laboratory and certain academic employees may become eligible for retirement choice and either UCRP/Pension membership or Savings Choice participation after working 1,000 hours in a rolling, continuous 12-month period. (Members of the Non-Senate Instructional Unit qualify for UCRP membership after working 750 hours in an eligible position.) Eligibility for choice between UCRP/Pension Choice or Savings Choice is effective no later than the first of the month following the month in which 1,000 hours (or 750 hours) is reached.

Exceptions: A University employee is not an Eligible Employee, and therefore ineligible for membership in UCRP/Pension Choice or participation in Savings

Choice, if the employee:

- Is at the University primarily to obtain education or training
- Is in a Per Diem, Floater or Limited appointment
- Is an employee hired as a visiting appointee on or after August 1, 1989, or
- Is a retired member

Once you become an active UCRP/Pension Choice member or active Savings Choice participant, your active plan status remains in effect, regardless of any reduction in appointment, until you have a break in service (see Definitions, below).

Break in service

A break in service includes any separation from service, any period on pay status but without covered compensation, or any period off pay status for four or more consecutive months. The following periods do not constitute a break in service for UCRP/Pension Choice membership or Savings Choice participation as long as the employee returns to pay status at the end of the period:

- Approved leave of absence without pay
- Temporary layoff (less than four months)
- Furlough
- Period of right to recall and preference for reemployment
- Return to pay status the next working day after leaving University employment
- Return to pay status after a military leave in accordance with employees' reemployment rights or
- Return to pay status from a medical separation within the time allowed under University policy