

## COMMITTEE ON EMERITI RELATIONS Annual Report 2022-23

To: Academic Senate, Santa Cruz Division

The Committee on Emeriti Relations (CER) met three times during the 2022-23 academic year. This year, CER's pro-active agenda included continued collaboration with the Emeriti Association and the CP/EVC on the Edward A. Dickson Emeriti Professorship Award, consultation with Pathways to Retirement Faculty Liaison, Don Brenneis, and a request to VPAA Herbie Lee for annual reports on numbers and contents of Pathway agreements by division. We also continued to monitor improvements at the UC Retirement Administration Service Center (RASC) through second hand reports from the Council of University of California Retiree Associations (CUCRA), the Council of University of California Emeriti Associations (CUCEA), and the campus Retirement and Emeriti Center (REC).

The Chair of CER is an *ex-officio* member of the Committee on Faculty Welfare (CFW) and attended committee meetings throughout the year. The Chair also represented CER on the Retiree and Emeriti Center (REC) Steering Committee and attended the fall and spring CUCRA/CUCEA meetings in October 2022 and April 2023.

### I. The Edward A. Dickson Emeriti Professorship Award

The Edward A. Dickson Emeriti Professorship is an endowed award distributed to the ten UC campuses under the authority of the EVC of each campus to recognize the teaching, service, and research of UC emeriti. In 2015-16, by request of former CP/EVC Alison Galloway, CER assumed management of the award and collaborated with the UCSC Emeriti Association to re-envision the award and create a new process and guidelines for the award on our campus.

#### **2023-2024 Dickson Professorship Award Process**

The call for 2023-24 proposals went out to Senate faculty, divisional deans, and department chairs on October 24, 2022 with a deadline for submissions of January 16, 2023. The call resulted in four proposals; two from the Arts Division, one from Humanities, and one from PBCSci. The proposals were forwarded to the Emeriti Association Dickson Award Review and Nomination Committee, which passed its recommendation to CER. CER in turn sent a final recommendation to the CP/EVC for approval. CER is pleased to continue its collaboration with the Emeriti Association in this endeavor.

#### **2023-24 Dickson Professorships<sup>1</sup> were awarded to:**

- **Kathy Foley, Department of Performance, Play, and Design**  
Project Title: *Globalizing the Arts: The Center for World Music and its Impacts*  
Professor Emerita Foley will use her Dickson Professorship Award to initiate a new research project to study the history and influence of the Center for World Music. ASEA

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<sup>1</sup> CER Dickson Emeritus Professorship Award Webpage: <https://senate.ucsc.edu/committees/cer-committee-on-emeriti-relations/dicksonprofessorship/index.html>

(American Society for Eastern Arts, 1963-1973), later called the Center for World Music (CWM, 1974-1979), was a summer program that for two decades allowed many Americans to study Asian performance genres with master artists (primarily of Indonesian and Indian, but also Japanese, Korean, and African music/dance/theatre traditions). The program resulted in significant globalization of artistic resources tapped by contemporary American artists, dancers, and musicians in creative work and university teaching. Research will result in better documentation of its history and result in multiple articles or monographs, lecture demonstrations, and the development of exhibit materials. Prof. Foley proposes to study the archives of the Center currently split between San Diego and the University of Illinois, spending two weeks in each of these sites. An additional two weeks will be in San Francisco interviewing and visiting studios of the many alumni of the Center for World Music who still live there, and another two weeks at Wesleyan University where Scripps support helped develop robust Indian and Indonesian dance/music programs. She plans additional zoom interviews to study the CWM links to area studies programs at University of Washington, University of Wisconsin-Madison, Cornell University, Eastman School of Music, Colorado College, New York University, Indiana University, and Cal Arts.

- **Edward F. Houghton, Music Department**

Project Title: *Critical Edition of the Chigi Codex: Publication, Dissemination, Musical Performance*

Professor Emeritus Houghton, after decades of work, has completed the transcription of forty works into modern musical notation from the Chigi Codex, a rare illuminated manuscript containing musical masterworks from the late fifteenth century. His Dickson Professorship Award will support publication in the Monuments of Renaissance Music series by the University of Chicago Press, of this transcription, along with critical commentary on each work, collation of more than a hundred concordant sources, and a historical study of the manuscript and its art. In addition, his award will provide support for a concert of works from the Codex at the international Herrenchiemsee Festival in Bavaria, Germany on July 19, 2023, conducted by Martin Steidler (director of ensemble LauschWerk), Houghton, and Kent Nagano (UCSC alum). He will also present on this work at the international Medieval and Renaissance Music Conference in Munich, Germany, July 24-28, 2023.

- **Susan Strome, Department of Molecular, Cell, and Developmental Biology**

Project Title: *Supporting and Empowering Women Leaders in STEM*

Distinguished Professor Emerita Strome's Dickson Professorship Award will partially fund two CoRE workshops aimed at supporting and empowering 20 STEM women in positions of leadership in academia. The goal is that these women will in turn improve the recruitment, retention, and success of many more women faculty in their circle of influence. The Community of Replenishment & Empowerment (CoRE) is a group of women supporting women. Their mission is to support, revitalize, empower, and promote networking of women in academia through structured multi-day workshops. CoRE workshops are typically 3 days with 10 participants and 2 facilitators. They consist of structured intensive work sessions during which each participant discusses a dilemma of personal importance and strategizes with the rest of the group on approaches and solutions;

unstructured time to relax, enjoy each other's company, share communal meals, and importantly continue discussions; and a closing ceremony for participants to share final thoughts and feelings. The retreats are held in homes or AirBNBs, where all participants live, work, and eat together.

## II. UCSC Pathways to Retirement Program

CER met with Pathways to Retirement Faculty Liaison, Don Brenneis on May 20, 2023. Prof. Brenneis reported that informal feedback on the program has been generally positive. But he also confirmed CER's earlier analysis that showed that there remains a great deal of variation among departments and divisions in what resources are routinely offered to prospective retirees and retired faculty. CER continues to be concerned about a lack of transparency and equity in terms of the resources and services provided to emeriti across divisions and departments. Prof. Brenneis indicated that he thought that these differences may be due, in part, to the fact that there are no centralized funds or resources available to support the Pathway agreements. But also, in part, these differences may be due to a lack of shared knowledge among departments and divisions about what each is doing and what is institutionally possible.

CER proposed setting up a meeting in fall 2023 that would include the Pathways to Retirement Faculty Liaison (Brenneis), the incoming Chair of CER (Prof. Kathy Foley), a representative from the campus Academic Personnel Office (APO), and the assistant deans in charge of academic personnel in each division.<sup>2</sup> The goal of such a meeting would be to share information among divisional representatives, to promote best practices across units, and to discuss ways that CER, the Pathways program, and the divisions might collaborate in advocating for the support of prospective retirees and emeriti. Some examples of potentially helpful shared knowledge are how different divisions deal with leftover funds in emeriti research accounts and how they handle emeriti requests for research/lab space. An example of a "best practice" that might be emulated across campus was the Molecular, Cell, and Developmental Biology Department's deliberative process for creating shared research/lab space for emeriti faculty.

CER also suggested that we might collaborate with the Pathways program by issuing a joint memo each fall to Senate faculty informing them of the program and how to initiate the consultation process. CER thought that including some short testimonials from faculty that had participated successfully in the Pathways program might encourage other prospective retirees to participate.

CER is concerned that the sample Pathways agreement on the Academic Personnel Office (APO) website is too vague.<sup>3</sup> We understand that for privacy reasons these agreements are kept confidential. However, CER would very much like to see more realistic sample or model agreements on the Pathways website, perhaps an example from each division. These might be constructed by getting private feedback from participants in the program who are willing to discuss the sorts of provisions that were included in their agreements. CER contends that greater transparency about what "normal" agreements might look like would alleviate dissatisfaction

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<sup>2</sup> CER Chair Habicht Mauche to Pathways to Retirement Liaison Brenneis, 6/08/23, Re: Post Consultation, May 20, 2023

<sup>3</sup> <https://apo.ucsc.edu/retirement/pathway-agreement.html>

among prospective retirees and emeriti who either do not know what resources are potentially available to them and under what conditions, or who have unrealistic expectations about what is possible, especially within different divisions.

CER members were surprised to learn that Prof. Brenneis is not receiving an official report of the number of successful Pathways agreements that are being negotiated annually. Therefore, CER sent a request to VPAA Herbie Lee<sup>4</sup> that a formal report be provided annually to both the Pathways Faculty Liaison and the Academic Senate enumerating how many requests for Pathways agreements are initiated, how many have been negotiated, what general categories of provisions they include, and indicating how many of those agreements were facilitated through consultation with the Pathways Faculty Liaison. Enumerating these by division would be very helpful to assessing the usefulness and equity of the program across campus. While we respect the confidentiality of individual agreements, CER strongly contends that there needs to be some assessment of, and accountability for, the effectiveness of this relatively new program.

CER looks forward to following up on these issues with both Prof. Brenneis and VPAA Lee in 2023-24.

### **III. UC Retirement Administration Service Center (RASC)**

CER continues to be concerned about the generally poor service provided to UCSC emeriti faculty, retired staff, and their survivors by the UC Retirement Administration Services Center (RASC). Based on their own self-reporting, RASC seems to be doing better with processing times for “normal” retirements, but many complicated cases are still not being resolved prior to employee retirement dates. Since RASC is unwilling to provide retirees and emeriti in this situation a conservatively estimated pension while they work out final calculations, some people still go months with no pension payments. Outside contractors are helping with answering phones, but often do not have the needed information to answer anything but simple queries, such as how to reset passwords. Long wait times for a response from a knowledgeable RASC employee, either by phone or secure email, continue to be unacceptable. Huge backlogs remain for processing survivor benefits. Promised improvements in survivor processing with the new dedicated phone line and use of Benet software have not been fully realized. The promised counselor program is still not up and running. While some counselors have been hired, there is still no director for the program, and no clear vision for what support will or will not be provided by counselors. There appears to be some tension between expectations for “advice vs. counseling,” with retirees and emeriti demanding that counselors provide “advice” (i.e., specific help with individual problems), while RASC indicates that the program will focus on providing “counseling” (i.e., generalized educational information and programming). Anecdotal information suggests that there are still problems with survivors and new retirees being dropped from their entitled health care benefits. Overall the organization seems too risk averse and unwilling to institute more “band aid” solutions (similar to the No Lapse in Pay Program) to improve services while they work to truly fix some of these complex issues. As a result, services continue to not improve or improve unacceptably slowly. Much of the information reported here has been gleaned secondhand from reports received by the Chair of CER at monthly meetings of the campus Retiree and Emeriti Center, CFW

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<sup>4</sup> CER Chair Habicht Mauche to VPAA Lee, 6/08/23, Re: Request for Pathways to Retirement Program Annual Report

meetings (UCFW reports by the Chair), or at the semi-annual CUCRA/CUCEA meetings. In 2023-24, CER should consider working with our sister Senate committees on other campuses to request regular consultations and updates directly from RASC administrators.

The CER Chair collaborated this year with the other members of the campus REC Steering Committee to develop a survey instrument to be administered to UCSC retirees and emeriti to evaluate their experiences with RASC over the last three years. This survey instrument is complete and should be ready to be distributed over the summer. Next year's committee will likely want to evaluate and report on the results of this survey, in consultation with the UCSC Emeriti and Retiree associations.

#### **IV. Health Care Benefits for Out-of-State Emeriti and Retirees**

The 2022-23 CUCRA/CUCEA Joint Benefits Report<sup>5</sup> raised concern about the apparent lack of equity between Medicare supplement plans offered to in-state emeriti and retirees and those that can be purchased on the open market through VIA Benefits by out-of-state retirees and emeriti. The report requested that the UC administration conduct a formal comparative analysis. CER should continue to monitor this issue.

#### **V. Post Mortem Email Access**

In winter 2020, CER contacted the Committee on Informational Technology (CIT) about the feasibility of creating a campus policy that would allow a faculty member to authorize one or more individuals to access their UCSC email account after death. CIT took up this issue, consulted with former Vice Chancellor for Information Technology (VCIT) Van Williams, and wrote to Chancellor Larive and CP/EVC Kletzer to raise the issue and offer a list of possible policy/procedure solutions.<sup>6</sup> In summer 2021, Chancellor Larive met with Senate, IT leadership, and Campus Counsel to discuss, and charged a working group to address the issue. Unfortunately, no policy proposal has been submitted to the Senate for review, now two years later. CIT has been informed that the working group has met, but they have yet to finalize draft recommendations. CER looks forward to seeing a draft policy and a formal request for Senate review in 2023-24.

#### **Acknowledgements**

CER would like to acknowledge the wonderful support that it receives from its analyst, Jaden Silva-Espinoza, and would also like to thank Matthew Mednick and Michele Chamberlin for their excellent backup support in spring 2023.

Respectfully submitted,

COMMITTEE ON EMERITI RELATIONS

Linda Burman-Hall  
Diane Gifford-Gonzalez  
Lisbeth Haas  
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<sup>5</sup> Academic Council Chair Cochran to HR Vice President Lloyd, 5/10/23, Re: Joint Benefits Committee Report on RASC Performance

<sup>6</sup> CIT Chair Takayama to Chancellor Larive and CP/EVC Kletzer, 6/14/21, Re: UCSC Email Access Post Mortem

Alexander Sher, *ex officio*  
Judith Habicht Mauche, *Chair*

August 31, 2023