

Passion and Purpose: Transformative Connections



Retirement Center
University of California,
Berkeley
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After Cal: What?

- The Next Chapter
- Continuing Connections and Value

Today's Presentation

- UC Berkeley Blended Model
- Strategies
- Successes
- Challenges

Key Success Factors

- University Commitment and Support
- Mission Clarity
- Needs Assessment: Faculty, Staff (Non-Senate Academics, Executive, General)
- Program Diversity

UC Berkeley Retirement Center



The Connecting Link to

Build and maintain the bond
between the Cal community and
its retirees

Center History

- The Retirement Center is in its 17th year of service.
- Our constituents: Around 16,000 retired faculty, staff, and surviving beneficiaries from UC Berkeley, Lawrence Berkeley National Laboratory, and the UC Office of the President.

UC Berkeley Retirement Center

Mission

The UC Berkeley Retirement Center is dedicated to developing programs and services that contribute to the **well being** and **creativity** of retired faculty, staff and their families and that support the UC **community**.

Who is an Elder?

An Elder is a person who is still growing, still a learner, still with potential and whose life continues to have within it promise for, and connection to the future. An Elder is still in pursuit of happiness, joy and pleasure, and her or his birthright to these remains intact. Moreover, an Elder is a person who deserves respect and honor and whose work it is to synthesize wisdom from long life experience and formulate this into a legacy for future generations. ©The Live Oak Project, 1977



Change in Retirement Vision →

Change in Mission and Program

Traditional Retirement “Old Age”

- A short respite
- Rapid onset of health problems
- Stable self identity
- Focused on rest, leisure, travel

Retirement Transformation

- A 20 to 30-yr. stage of life defined by health and function
- Continued health & vigor for many
- Self-reinvention
- Focused on both old & new life options

A New Age

The Next Chapter of Life

We have different expectations

- Time , opportunity and resources to redirect talents, experience and interests
- Retirement as lifestyle change
- Many work into “retirement”
- Most want an active “retirement”

Top Three Concerns

- Finances
- Life's Meaning
- Personal Connections

A Purposeful Life

- **As Malachy McCourt noted in his thoughts about dreams of youth and the reality of older age, “I am on the road facing the light in search of another dream. And as I am wont to say: Live every day as if it is going to be your last because one day you will be right.”**

New Vision Implications

- Recognizing new developmental possibilities
- Capacity for change, growth and contribution
- New model for aging and later life



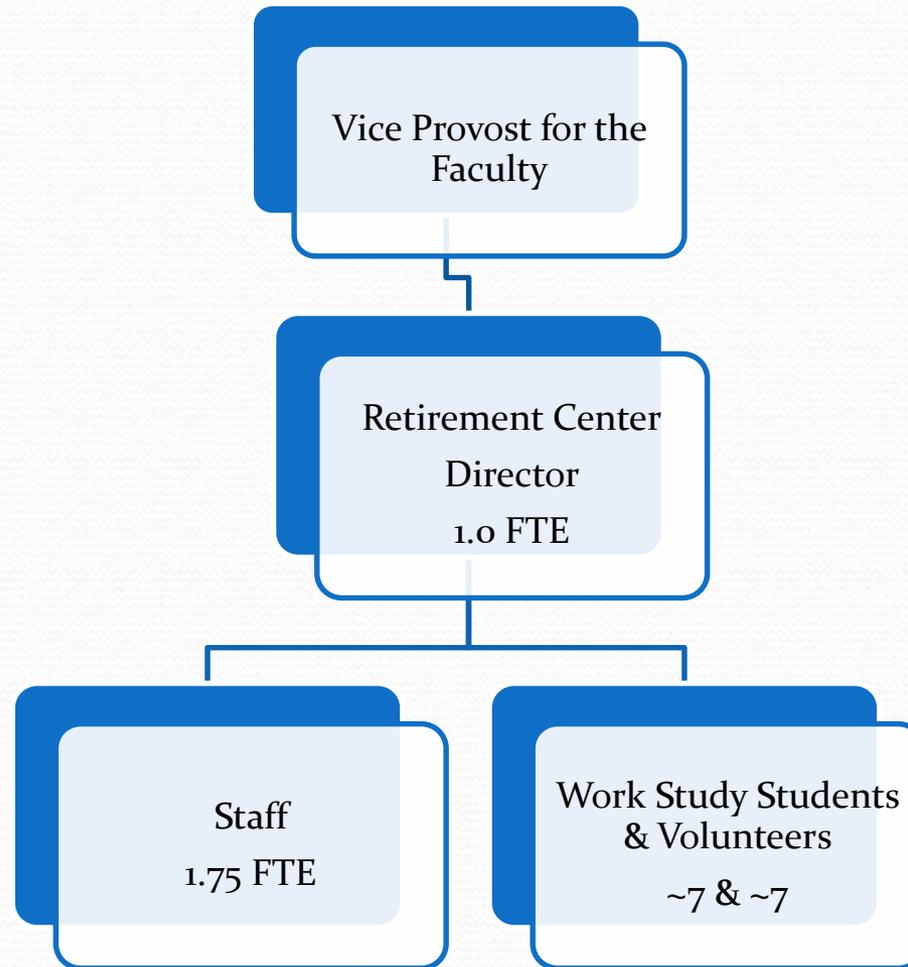
New Challenge for a New Age



Live Well as we Live Long



UC Berkeley Retirement Center Organization Chart



Retiree Associations and Advisory Board

- UCB Emeriti Association (UCBEA)
- University Emeriti Relations Committee of the Academic Senate (UER)
- Faculty Welfare Committee (FWC)
- UC Retirees' Association at Berkeley (UCRAB)
- EX-Ls (LBNL Retirees)
- President's and Regents' Retiree Association (PARRA)
- Center Advisory Board
 - Two reps per association, one each UER and FWC, four at large slots

Retiree Assn. Resources

- Lectures, luncheons, trips, mentoring, advocacy
- Emeriti Assn. triennial survey to document emeriti continuing contributions to the university, e.g., mentoring, teaching, research and publications
- Emeriti of the Year award
- Representation on the Council of UC Emeriti Associations (CUCEA) and Council of UC Retiree Assns. (CUCRA)
- Newsletters

Center Services and Programs

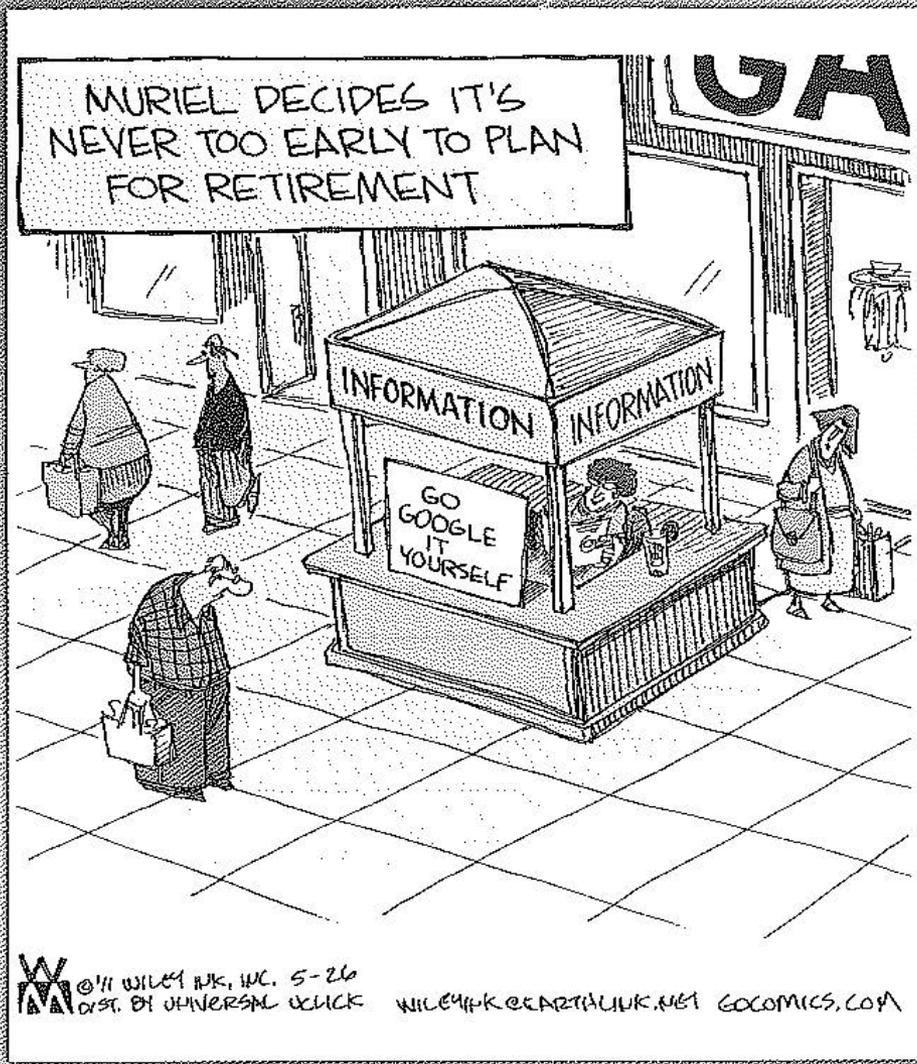
- Center website: <http://thecenter.berkeley.edu>
- *the CenterPiece* newsletter
- Free Learning in Retirement (LIR) Educational Series
- Pre-Retirement Planning Program (PRP)
- Chancellor Reception for New Retirees
- Biennial Retiree Conference
- Cal Connections Discounts and Service Examples
 - ID and Library Cards
 - Keep UCB email address
 - Health Insurance Counseling Program (HICAP)
 - Campus parking discount for Center programs
- Retiree Post UC Life Planning Programs/Caregiving
- Campus/Community Volunteer Opportunities
- Transforming Retirement Initiative

Learning in Retirement (LIR) Program

- Curiosity, Connection and Fellowship
- Emeriti LIR Planning Committee
- Target Audience = All Retirees
- Teaching Opportunity for Retirees
- Two to three series each Fall and Spring semester
- Two to four sessions per series

Pre-Retirement Program

- Since 1999, to help faculty and staff develop a **vision and plan** for their next chapter of life that is not retirement from life but rather a time to redirect life, and refocus energy, talents and interests on activities that contribute to a meaningful and financially stable life for them.



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PRP Sessions

- Introduction: A Redirected Life and Social Security
- Maximizing Your UC Benefits in Retirement
- Legal and Estate Planning Considerations
- Personal Financial Planning
- Long Term Care Insurance, Aging in Place and Housing Considerations, and Work-Life Transitions: Post Retirement Income
- Wellness in Retirement and Successfully Making Your Transition to Retirement (Retiree Staff and Faculty Panel)

Volunteer Opportunities

- Community:
 - With retiree associations – zoo, museums, etc.
 - Through Center: - MoU with Coming of Age: Bay Area
- Campus:
 - The Berkley Project Day, November 2014
 - Botanical Garden
 - Mentoring – student and junior faculty
 - Center events and committees
 - Student science education
 - HR Transitions Work Program

Community Strategy

- MoU (Memorandum of Understanding) with *Coming of Age Bay Area*, an initiative that seeks to harness the talents, skills and energy of one of our most valuable resources: people age 50+. They help people 50+ explore passions, pursue lifelong learning, become leaders, and engage in meaningful service to the community.
<http://www.comingofage.org/bayarea/>

Financial Resources

- UCB = ~ \$21/retiree plus in-kind for rent and utilities
- LBNL Contract = ~ \$53K/year
- OP Support = \$4,000/year
- Fees for email services, parking permit purchases, program registrations = ~ \$30K/year
- Annual donations = ~ \$20K/year

Retirees by the Numbers

- UCB Staff = 7,434 ~ (57%)
- UCB Emeriti = 980 ~ (8%)
- UCB Academics = 889 ~ (7%)
- LBNL = 2,536 ~ (19%)
- UCOP = 1,272 ~ (10%)
- Total = 13,111

Our Hope

- That instead of a plank off the campus ship into unknown waters...
- We offer a bridge to an interesting and satisfying future

“A Trick to the Graceful Exit”

“There’s a trick to the ‘graceful exit.’ It begins with the vision to recognize when a job, a life stage or a relationship is over – and let it go. It means leaving what’s over without denying its validity or its past importance in our lives. It involves a sense of future, a belief that every exit line is an entry, that we are moving up, rather than out.”

Author and columnist
Ellen Goodman

“What is it you plan to do?”

I do know how to pay attention, how to fall down
into the grass, how to kneel down in the grass,
how to be idle and blessed, how to stroll through the fields,
which is what I have been doing all day.

Tell me, what else should I have done?

Doesn't everything die at last, and too soon?

Tell me, what is it you plan to do

With your one wild and precious life?

The Summer Day, Mary Oliver



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