The UC Davis Retiree Center

From Concept to Reality

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Overview

It was a dedicated group of retirees, staff, and university administrators who worked for four years, 2002 - 2006, to develop and implement the concept of the
UCD Retirees Center. My engagement in this process was stimulated by the convergence of three separate activities. In sequence they were: transfer of the University Club to the campus; development of plans for a hotel/conference center on the Davis campus; and a proposal from the UCD Retirees’ Association to establish a UC Davis retiree center.

The pace of the Center’s development was influenced by cuts in state funding to the University just as the original proposal was submitted, legal actions to stop the planning for the hotel/conference center, and concerns about retiree parking privileges. Through perseverance of the retirees and great support from the Offices of the Chancellor and Provost and Human Resources, the concept of a Retiree Center reached its first milestone when the proposal was approved by Provost Virginia Hinshaw in 2005 and the Center’s advisory committee was appointed. In June, 2006, the Center became a reality with the appointment of Doreen Barcellona Strnad as Coordinator of the Center. I will trace the evolution of the UC Davis Retiree Center and show how the above events helped shape and influence its development.

The Cast


The Concept

An initiative to increase the number of campuses with Retiree Centers was launched in April, 2001, when Ralph Nair, Historian of the Council of University of California Emeriti Associations (CUCEA) distributed a questionnaire requesting information about Emeriti/Retiree Center services on each campus at the Spring CUCEA meeting. In September he followed up with a letter to each campus requesting completion of the questionnaire by October 11, 2001 with the goal of
presenting the results at the joint meeting of CUCEA and the Council of UC Retiree Associations (CUCRA) to be held at UCSF on October 25, 2001. Although some preliminary data were presented at the October meeting, Nair did not present the final results of the survey until the spring, 2002, meeting of CUCEA. He reported that four of the nine campuses appeared to have centers that were staffed on a full-time or part-time basis. Those campuses, in the order of their initial service date were: UCLA, 1969; UCSB, 1978; UCB, 1997; and UCI, 1998. Nair stated in his report that “although CUCEA has not been pro-active in the establishment of Emeriti Centers, it has not been reticent to make its voice and presence known on other matters” (Attachment 1). Nair was gently prodding his colleagues on the five campuses without retiree centers to get something started.

The concept of a Retiree Center at UCD was initiated by the UC Davis Retirees’ Association (UCDRA) in the spring of 2002. Howard Frank, President of the UCDRA, perhaps influenced by Ralph Nair’s survey, drafted a proposal to establish a retiree center at UCD (Attachment 2). In March, 2002 Howard discussed the Retiree Center concept with Ed Costantini, President of the UCDEA. He followed up with a note proposing a joint effort by UCDRA and UCDEA to get the University to establish a retiree center on campus. He wrote “I am enclosing, in confidence, a rough draft proposal that was discussed with our UCDRA Board. The draft contains some of the ideas discussed at a meeting of our UCDRA ad hoc committee. Establishment of a retiree center to provide support to our two organizations would also provide services for all annuitants, regardless of whether or not they are members of the Emeriti or UCDRA. We would envision our organizations maintaining our distinct separate identities, and separate programs despite opening of a retiree center to provide support. I hope we can work together and make the retiree center a viable and useful organization in support of the University”

This prompted Ed Costantini to send the following e-mail to the UCDEA Executive Committee to ask about the members’ interest in participating with UCDRA in developing a proposal for a UCD retiree center, if they would want to
meet with Howard Frank, or if they would prefer not to consider the issue at this
time.

I responded by suggesting that Howard Frank be invited to a meeting with the
Executive Committee. Subsequently, a meeting of the Executive Committee and
Howard Frank was held on April 12, 2002, but no record of the meeting can be
found and there was no discussion about the proposal at the May 23, 2002,
Emeriti Association business meeting.

The University Club and the Hotel/Conference Center

Coincident with Howard Frank’s work on the concept of a retiree center, I was
working with Bob Loessberg-Zahl on the future of the UC Davis University Club
(U-Club). As President of the U-Club, I had negotiated an agreement with

Provost Robert Grey to transfer the U-Club facility to the campus in return for the
University assuming the mortgage and operational debt that the U-Club had
accumulated over a period of years. At the time there were about 200 dues
paying members, approximately 140 being retired faculty and staff. Given that
the preponderance of the U-Club members were emeriti, it was proposed at a
May 24, 2002, meeting of the U-Club membership, to explore if the Emeriti
Association would provide an interim home for the U-Club rather than disbanding
it. Prior to the meeting John Yates, Executive Director of Real Estate Services
and a former President of the University Club, urged us to keep the U-Club viable
because he had a vision of incorporating the Club into the Hotel/Conference
Center that he was planning. Although John was not able to attend the May 24th
meeting, his staff presented the plans for the hotel/conference center including a
room adjacent to the main dining room which could be used for University Club
activities. I sent a message to Ed Costantini, President of the UCDEA on May
29th recommending that the idea of the Association providing a home for the U-
Club be presented to the Executive Committee (Attachment 3). By June, Dave
Labhard, U-Club manager, had left his position and the Special Events Office
designated a staff person to handle membership dues. The UCDEA Executive
Committee did not meet during the summer and discussion of an interim home for the University Club was postponed.

The Convergence of Activities

On September 11, 2002, Barbara Nichols, Second Vice President of the UCDRA, contacted me to see if the UCDEA would be interested in participating with UCDRA in a tour of the newly opened Mondavi Center. During the discussions and exchange of e-mail about the Mondavi tour, Barbara mentioned the UCDRA proposal for a UCD Retiree Center. Barbara said that Bob Eernisse, the new President of the UCDRA, would appreciate it if I would review the proposal and help move it forward. According to Barbara, there had been little progress since the proposal was originally drafted by Howard Frank in the spring. In the mean time, Deanna Falge Pritchard revised Howard Frank’s original draft to make it a more formal proposal, suitable for submission to the campus administration (Attachment 4).

Bob Eernisse brought Deanna Falge’s version of the Retiree Center proposal to my home a few days after Barbara’s email. The proposal for a retiree center seemed to be a very viable solution for resolving the U-Club’s future, at least on an interim basis, and the proposed Hotel Conference Center seem like an ideal venue for both the retiree center and some of the popular U-Club events such as the Fall Wine Festival, the Steak Bake, and the Mothers’ Day and Easter Brunches. With the exception of the Fall Wine Festival, the events were ones primarily attended by retirees in recent years. It also seemed that this approach would have support from the Provost’s office since there was interest in finding a resolution for the University Club as well as being very supportive of faculty and staff retirees.

I modified Deanna’s document to include information about the UCDEA, since the document was evolving into a joint UCDRA/UCDEA proposal, added a section to incorporate the U-Club, and mentioned the possible location of the
Center in the planned hotel/conference center (Attachment 5). I sent the revised draft "Proposal for an Emeriti/Staff Retirees Center to Bob Eernisse, Ed Costantini, and Barbara Nichols on September 26, 2002.

Bob Eernisse shared his copy with Deanna Falge Pritchard. As stated in the above e-mail message, another copy was sent to Bob Loessberg-Zahl to request an informal reading (i.e., to see whether the proposal was moving on the right track). Ed Costantini responded on September 30th with an excellent revision (Attachment 6). On October 1, Bob Loessberg-Zahl responded with the message that we were on the right track and made some suggestions for improvement and also offered to help advance the proposal (Attachment 7). I made a few changes in Ed’s draft to incorporate the suggestions made by Bob Loessberg-Zahl and sent the edited proposal to Ed Costantini, Bob Eernisse, and a copy to Barbara Nichols.

The revised proposal was approved by the UCDEA Executive Committee on October 15, 2002. One member of the Executive Committee had reservations about involving the University Club in the proposal, but a majority of the members supported the concept. Following the Executive Committee meeting, Ed Costantini made a few additional modifications in the proposal and prepared a draft cover letter addressed to Provost Virginia Hinshaw and Senior Associate Vice Chancellor Dennis Shimek. Ed sent the modified proposal and draft letter to Deanna and me on October 30th. Deanna and I made some additional suggestions and on November 7, 2002, Ed sent us the penultimate draft of the proposal (Attachment 8).

**Back to the Hotel/Conference Center**

In a separate activity, I met with John Yates on October 30th to check on the status of the hotel/conference center and the possibility of locating the proposed retiree center in the new facility as well as including activities associated with the University Club. He continued to be enthusiastic about the concept. John requested the opportunity to meet and share the current plans for the Hotel/Conference Center with the UCDEA Executive Committee and the UCDRA
Board. A meeting was scheduled for November 14th following the Emeriti/Retirees Association monthly luncheon in Rec Pool Lodge. At the meeting, John indicated that the timing of the proposed Retiree Center was excellent because he hoped to have a new developer on board by mid-November and encouraged the two associations to get the proposal to the Provost by mid November.

**Proposal Submitted**

Anne Gray, First Vice President of the UCDRA and an active participant in the planning process, reported that on Monday, October 4, the UCDRA Board approved the version of the proposal that Deanna Falge Pritchard had received from Ed Costantini on September 30th. The Board authorized Bob Eernisse, as President, to work with UCDEA to submit the proposal formally to the campus administration. The proposal was submitted on November 16, 2002 (Attachment 9).

By mid-December I had not heard if there was any response to the proposal. On December 17, 2002, I contacted Ed Costantini to be sure the proposal had been submitted. Ed responded that the proposal had indeed been sent to both Provost Hinshaw and Senior Associate Vice Chancellor Dennis Shimek. To my knowledge there was no formal response from either Provost Hinshaw or Dennis Shimek. However, a meeting was held with some of the retirees suggested in the November 16th letter (See above). Attending were Bob Loessburg-Zahl, Dennis Shimek, Ed Costantini, Barbara Nichols, Deanne Falge Pritchard, and me. Bob indicated that the proposal had been favorably received by the Provost and that while it was being studied he and Dennis would explore the possibility of temporary staffing. At this time UCDEA had part-time staff support, but UCDRA did not.

**The Hiatus**
What followed was a long hiatus – over a year - caused by a number of events. First, and foremost, the University was facing a drastic budget reduction and the possibility of launching any new program such as a Retiree Center, when existing programs were facing cut-backs and staff reductions, was out of the question. Second, Norman Rogers, a Davis business person, brought a suit against the campus’ proposal to build a hotel/conference center, challenging the project’s environmental impact report. Third, the officers of the UCDEA and UCDRA were engaged in intense discussions with the campus administration over a proposal to terminate retiree parking privileges. Ed Costantini, Deanna Falge Pritchard and I did have a meeting with John Yates in January 2004 to review the status of the Hotel/Conference Center when it seemed that the legal actions would be resolved and planning could resume. However, after the first lawsuit was judged in the University’s favor by the Alameda Superior Court, Mr. Rogers appealed in April 2003 on the basis that the Hotel/Conference Center would unfairly compete with the Davis hotels and motels. A third law suit was filed by a local attorney in December 2003 following the Regents approval of the financial terms of the project. The continuing legal actions jeopardized private funding opportunities, delaying the project even more.

**Getting Back on Track**

On October 1, 2004 I sent a message to Bob Loessberg-Zahl and asked if he and Dennis Shimek would be willing to meet with Barbara Nichols, Anne Gray, Deanna Falge Pritchard, Ed Costantini, and me to develop a plan of action for getting the Retiree Center back on track.

A meeting was scheduled for October 20, 2004 with Bob L-Z and Dennis Shimek. Barbara, Anne, Deanna, Ed, and I met immediately before the meeting to discuss the approach we should use in our meeting with Bob and Dennis and to hear from Deanna what other universities were doing in regard to retiree centers. (Deanna was the UCDRA and UCDEA representative to the Association of Retirement Organizations in Higher Education (AROHE), a national organization representing university retiree organizations.)
At the meeting with Bob and Dennis, it was agreed that the best approach was to request from the Provost formal appointment of a Retiree Center Planning Committee with representation from the two retiree organizations, AROHE, Human Relations, University Relations, the current president of the University Club, and the Special Projects Director. Deanna agreed to draft a charge to the committee to guide the development of a UCD Retiree Center based on the November 16, 2002 proposal that had been sent to the Provost by Ed Costantini and Bob Eernisse. On October 24, 2004, I circulated Deanna’s draft with a few modifications and additions to Barbara Nichols, Anne Gray, Deanna Flage, and Ed Costantini for their review and approval (attachment 10). The justification, charge, and proposed membership of the UCD Retiree Center Planning Committee were sent to Bob L-Z on October 26th. Included was also a request that Bob L-Z serve as chair of the Planning Committee. Bob responded the same day that he would share the document with the Provost and see if she had any suggestions and then get the ball rolling. Bob sent a message on November 30th that the Provost would sign the “charge letter” and that Rick Vorpe from University Relations had agreed to serve on the Planning Committee. Bob said he would try to convene the committee in early January. A December 1, 2004 letter (Attachment 11) from Provost Virginia Hinshaw established the UC Davis Retiree Center Planning Committee with the following membership:

Ed Costantini, Past President, UC Davis Emeriti Association
Anne Gray, Immediate Past President, UC Davis Retirees’ Association
Elizabeth Hansen, Manager, Benefits, Human Relations
Charles Hess, President, UC Davis Emeriti Association
Bob Loessberg-Zahl, Chair, Assistant Executive Vice Chancellor
Don Margolis, President, University Club
Barbara Nichols, President, UC Davis Retirees’ Association
Deanna Falge Pritchard, Representative, Association of Retirement Organizations in Higher Education
Dennis Shimek, Senior Associate Vice Chancellor, Human Resources
Provost Hinshaw requested that the Planning Committee consider options, including the November 16, 2002 proposal, for strengthening campus connections with the growing UC Davis annuitant population and recommend a course of action. The aim of the center would be to enhance the retirees’ participation in campus life by consolidating and expanding their program offerings, providing dedicated campus space for offices, and enhancing staff support. The charge to the committee had three elements: 1) a statement of mission, goals and organizational relationships that proposes mission, functions relationships to campus units and other campus organizations, and principal point(s) of contact within the campus administration; 2) a statement of operations that (a) defines the operational requirements implied by the mission priorities of the Center, including staff, budget, and space, and (b) reviews the possible source of funds to support the operational requirements, including campus resources, fundraising, and member fees; and 3) a draft charge for an oversight committee that will guide the implementation of the Center and ensure its long-term viability. The Provost also requested an overview of retirement centers that exist at other UC campuses. A report from the Planning Committee was requested by April 29, 2005.

The Planning Committee Meetings

The first meeting of the UC Davis Retiree Center Planning Committee, chaired by Bob L-Z, was held on December 20, 2004. Included on the agenda, following introductions, were a review of the charge to the committee including the mission; long-term organizational structure; and an operations statement dealing with funding, staffing, space and priority setting. Tasks included acquiring models from other UC Campuses, draft work products, communications, and setting deadlines. It was agreed to form a subcommittee to draft statements of mission, goals and functions of the Center. Members of the subcommittee were Bob Loessburg-Zahl, Dennis Shimek, Anne Gray, Deanna Falge Pritchard and me. I agreed to prepare a draft of the statement and circulate it to the subcommittee
prior to our next meeting and Deanna Falge Pritchard agreed to collect information about Retiree Centers on other UC campuses. Bob L-Z contacted DateLine about developing an article describing the proposed center. A draft mission statement was circulated to the members of the subcommittee on December 30th in preparation for a subcommittee meeting on January 12, 2005 (Attachment 12). Sharon Anderson, executive assistant to Bob L-Z, set the dates for the next meetings of the full planning committee on February 28th, March 21st and April 20th. On February 7, 2005, Shelley Glazer, Director of the UC Berkeley Retirement Center, gave a presentation at the UCDRA Winter Meeting describing how the UCB’s Center serves the “Cal community”. Shelley was very pleased that UCD was planning a retiree center and offered her support. Provost Virginia Hinshaw attended the presentation.

Significant progress was made at the February 28th meeting, chaired by Bob L-Z. Included was a revision of the mission statement prepared by the subcommittee and a major discussion on organizational issues. Questions were raised about the functional and operational distinction between the center and the associations. Also, could the funds currently provided by Human Relations to UCDRA and the by the Provost’s Office to UCDEA, via the Academic Senate, be redirected to the Center. Bob LZ agreed to explore these issues and the Association representatives were to prepare a list of functions they would retain. Additionally, the question of how to serve the UCD Health Services retirees was raised. An important issue was to whom should the center administrator report. There was general agreement that the Center’s administration should report to the Offices of the Chancellor and Provost. Composition of the advisory board was discussed. A possible model would include the president and two other representatives from each Association; and three administrators, including Human Resources, Offices of the Chancellor and Provost, and a representative from the UCD Medical Center. There was also discussion about the appropriateness of having someone from the campus Development Office on the Advisory Board. It was concluded that having a person associated with fundraising on the advisory committee might send the wrong message to retirees.
The March 21, 2005 Planning Committee meeting was devoted mainly to discussions of the Division of Responsibilities drafted for the Emeriti Association, and a draft organizational plan prepared by Bob L-Z. Staff and space were also discussed at the meeting. It was agreed that the Retiree Association would prepare a Division of Responsibilities between the UCDRA and the Center, similar to the Emeriti Association document. Bob L-Z’s organization plan established the Emeriti/Retiree Center as an institutional support unit of the Offices of the Chancellor and Provost (OCP). The Center would receive day-to-day administrative support services for the OCP including, but not limited to, accounting and finance, human resources, gift processing, budget, and technology operations. The director of the Center would be the equivalent to a department head, would be a University staff member, and would report to the Executive Officer of the OCP. The organizational plan also called for an Advisory Committee to work with the director on the overall direction and focus of the Emeriti/Retiree Center. This committee would work with the Director and the Provost/EVC to establish the goals and priorities of the Center, guide relations between the Center and the Emeriti and Retirees’ Associations and guide relations between the Center and campus administrative units outside of the OCP. There was discussion about the name of the Center and the name “Emeriti/Retirees Center” was proposed. It was agreed that the Association representatives would consult with their respective organizations to get alternative suggestions for the Center’s name.

The UCDEA Executive Committee met on March 22nd and reviewed the Division of Responsibilities between the Retiree Center and the Emeriti Associations. No changes were suggested. The Executive Committee recommended that the name of the Center should be “The Center for Retired Faculty and Staff”. In preparation for the April 20, 2005 meeting of the Retiree Center Planning Committee meeting, Bob LZ sent an email with four attachments. Included were a draft letter to Provost Hinshaw, the draft organizational plan, the division of responsibilities between the Retirees’ Association and the Center, and a copy division of responsibilities between the Emeriti Association and the Center that had been considered at the March meeting of the Planning Committee. The April
20th meeting completed the work of the planning committee. All members were very pleased with the rapid progress that had been made under the leadership provided by Bob L-Z. Bob sent the report of the Planning Committee to Provost Hinshaw on May 16, 2005 (Attachment 13). On June 24, Bob sent the following e-mail message.

**The Center Gets Another Name**

The Center Planning Committee members were very pleased with the Provost’s decision to support the establishment of the Retiree Center. However, there was concern about the name that the Provost suggested for the Center. I followed up on Bob LZ’s offer to consult with others about the name and set up a meeting with Anne Gray, Barbara Nichols, Deanna Falge Prichard, Charles Lacy, and Ed Costantini to explore other suggestions for the name of the Center. Dianna was not able to attend but sent a suggested name “The Center for Retirees Resources and Relations”. The short name could be Retirees’ R&R. The outcome of the meeting was a list of three suggestions. Listed in order of preference, they were:

- Activities Center for Retirees and Emeriti (ACRE),
- Retiree Activity Center (RAC)
- Center for Retirees Resources and Relations (Retiree R & R)

On June 13th we learned that the Provost selected “The Center for Retirees Resources and Relations” as the name.

On August 5, 2005, Provost Hinshaw sent the following letter to the Retiree Center Planning Committee (See also Attachment 14):

The Presidents of the UCDEA and UCDRA sent recommendations to the Provost for an Association member at large to serve on the Advisory Committee and a
person who was not currently an Association member to represent emeriti and retirees who were not affiliated with either Association. A letter appointing the Advisory Committee for the Center for Retirees Resources and Relations and assigning a charge to the Committee was sent to the members on September 22, 2005. (Attachment 15)

The inaugural meeting of the Advisory Committee was held on October 28, 2005. Attending were Gloria Alvarado, Liz Hansen, Charles Hess, Charles Lacy, Bob Loessberg-Zahl, Barbara Nichols, Deanna Falge Pritchard, Dennis Shimek, and Richard Wydick. Two members, Ed Costantini and Calvin Handy, were not able to attend. The first year’s activities of the Advisory Committee are described in the 2005-2006 Annual Report of the UC Davis Retiree Center Advisory Committee. The report can be seen on the UCD Retire Center web-page: http://retireecenter.ucdavis.edu/welcome.html.

One of the major activities during the first year of operation was the development of a position description for the Coordinator of the Retiree Center followed by the recruitment and interviews of individuals who applied. Leslye Hays, Executive Officer of the Chancellor/Provost’s Office joined the committee, and along with Gloria Alvarado and Liz Hansen, played a key role in the development of the position description and the recruiting process.

One of the issues that came up during the development of the position description was that the name Center for Retirees Resources and Relations was awkward to use in position descriptions and when describing the Center. The Committee reviewed the names that had been considered in the past and after several discussions, recommended the “UC Davis Retiree Center” as an alternative and the Provost accepted. The UC Davis Retiree Center - finally a reality - became operational in June 2006 following the appointment of Doreen Barcellona Strnad as the Center’s first coordinator.

Acknowledgements
I thank the following individuals for reviewing the draft of The UC Davis Retiree Center – From Concept to Reality. All played important roles in the evolution of the Center. Their suggestions, corrections, and edits have been incorporated into the text.


I also thank Eva Hess, my wife, for her very constructive suggestions and edits.