



# CenterPiece

UC BERKELEY RETIREMENT CENTER ANNUAL NEWSLETTER

FALL 2017

## Happy 20th to the Retirement Center!

**E**stablished in 1997 in a small space at Boalt Hall, serving just over 5500 retirees, the Retirement Center has grown to serve an active, energetic and creative community of 16,000 retirees and beneficiaries from UC Berkeley, the Lawrence Berkeley National Laboratory, and the UC Office of the President. Approved by then Vice Chancellor Carol Christ and Chancellor Chang Lin Tien, inaugural services included free admission to the Berkeley Art Museum, discounts at Rec Sports, and access to a Retiree ID and Library Card, followed by our highly acclaimed *Learning in Retirement* series. These are among our most popular offerings to this day.

In the year ahead many of our anchor programs return, including *Learning in Retirement*, starting in the fall with a fascinating look at the Supreme Court as well as an exploration of Cal Prep, a public charter and early college secondary school, co-founded by UC Berkeley. Our Associations have a number of speakers lined up, on topics like plant evolution, Greek literature, astronomy, earth sciences and more. We'll host industry health care experts to present on topics related to caregiving, housing, and estate planning. We're also pleased to offer again our *Getting Started With Your Apple iPad*, taught in collaboration with our very knowledgeable "Apple Enthusiast," Pat Hom.

What's new this year? Belmont Village Albany is now open and moved in its first residents! After 5+ years

in the making, our Planning Committee is excited about our affiliation agreement and the work we've done to build in the culture of Cal at Belmont Village. This includes a rotating art gallery with works from UCB Art Practice Department students; an archival photo timeline of Cal over 150 years developed with retired Library Archivist Bill Roberts; a teaching module developed by Committee Members Pat Pelfrey and Don Grether to teach Belmont Village staff about a history of UC as well as the affiliation agreement; and our work to arrange opportunities for students and retirees to learn from each other. Finally, but not last, I am pleased to announce our upcoming Retirement Conference on May 22, 2018, featuring keynote speaker, Laura Carstensen, Director

### RETIREMENT CENTER HIGHLIGHTS FOR 2016-17

Over 15,000 retirees and beneficiaries served



#### LEARNING

- 2,000 attended 20 LIR programs
- 400 attended workshops/tours



#### RETIREMENT TRANSITIONS

- 600+ participants in Pre-Retirement programs
- Offered 2 new retirement insights workshops



#### COMMUNITY & ADVOCACY

- 500+ retirees honored at reception
- 7,000+ retiree members in Retiree Associations



#### COMMUNICATIONS

- 5,500+ receive bi-weekly CenterExpress



#### SERVICES

- 700+ retirees with @berkeley.edu bMail
- 25+ campus-wide discounts and perks with your Retiree ID card

of the Stanford Center on Longevity, and author of the book "A Long Bright Future: Happiness, Health, and Financial Security in an Age of Increased Longevity." Please mark your calendars!

This is your Center. We are dedicated to helping you and your family live well in retirement. Support and involvement of our retirees are key to this. Do you have an idea, a concern, or a

project on which you'd like to partner? I'd like to hear from you. To participate in any of our programs or to provide assistance, please call (510) 642-5461 or email [ucbrc@berkeley.edu](mailto:ucbrc@berkeley.edu).

I look forward to hearing from you!

Cary Sweeney, Director

## More to Come

The LIR Committee is currently organizing programs for Spring 2018 and the following year. As we near the end of this fall semester, visit our website [www.retirement.berkeley.edu/learning](http://www.retirement.berkeley.edu/learning) or call 510-642-5461 to learn about LIR programs for next Spring.

### Learning in Retirement Committee, Professors Emeriti

Carol N. D'Onofrio, Chair  
Louise George Clubb  
Marvin Cohen  
Watson "Mac" Laetsch  
Paul Licht  
Donald A. Riley  
Lawrence Waldron

## CenterPiece

The UC Berkeley Retirement Center is dedicated to helping retirees and their families live well in retirement. The UCBRC Advisory Board advises UCBRC on projects and programs.

### UCBRC Advisory Board

Lynn Bailiff, UCRAB  
Jim Dolgonas, PARRA  
Marian Gade, UCRAB  
Nancy Horton, Member-At-Large  
Tom Leonard, Member-At-Large  
Booker McClain, PARRA  
Lynn Nakada, Member-At-Large  
Patti Owen, Chair  
Ken Polse, Academic Senate  
Committee on Faculty Welfare  
Henry Rutkowski, EX-Ls  
Lee Schroeder, EX-Ls  
Richard Sextro, Past Chair  
Angelica Stacy, Ex Officio  
John Swartzberg, UCBEA  
Sheldon Zedeck, UCBEA

### Retirement Center Staff

Cary Sweeney, Director  
Kris Thornton, Program Manager

Newsletter Design:  
Alexander Atkins Design, Inc.

# Learning in Retirement

UC retirees and their guests may attend all programs at no cost. Advance registration is appreciated. For more information and to register go to: <http://retirement.berkeley.edu/LIR/schedule> or call the Retirement Center at 510-642-5461.



### THE SUPREME COURT TODAY

Organized by Professor Emeritus Louise George Clubb, Departments of Italian Studies and Comparative Literature

#### "Justice Gorsuch's First Term on the Court"

Jesse Choper, Earl Warren Professor Emeritus of Public Law, UC Berkeley  
Tuesday, September 12, 2017,  
2:00 - 4:00 pm

#### "The Supreme Court and Habeas Corpus in Wartime"

Amanda Tyler, Professor of Law, UC Berkeley  
Thursday, September 28, 2017,  
2:00 - 4:00 pm

#### "The Supreme Court in the People's Court"

Jack Citrin, Professor of Political Law and Director, Institute of Governmental Studies, UC Berkeley  
Monday, October 9, 2017,  
2:00 - 4:00 pm



### CREATING EDUCATIONAL OPPORTUNITY IN AN UNEQUAL WORLD: THE CAL PREP STORY

Organized by Professor Emeritus Rhona S. Weinstein, Department of Psychology and Professor Frank C. Worrell, Graduate School of Education with Professors Emeriti Donald A. Riley, Department of Psychology, and Carol N. D'Onofrio, School of Public Health.

"LIR programs are such a wonderful way to keep your brain working 'after work!'"

PAST ATTENDEE

"These wonderful talks continue to enlighten our minds and fill our hearts with gratitude for the ongoing opportunity to keep learning."

PAST ATTENDEE

**“Unequal Educational Opportunity and the Role of the University”**

Professor Emeritus Rhona S. Weinstein; Professor Frank C. Worrell; Professor Genaro Padilla, Chair, Department of English; and Ms. Gail Kaufman, M.A., Senior Advisor, Center for Educational Partnerships, UC Berkeley.

Tuesday, October 31, 2017,  
2:00 - 4:00 pm



**“A Different Kind of High School: For Excellence and Equity”**

Professor Rhona S. Weinstein; Tatiana Lim-Breitbart, CAL Prep Chemistry teacher and Aspire Bay Area Regional Science Specialist; and a CAL Prep graduate (TBA)

Tuesday, November 7, 2017,  
2:00 - 4:00 pm

**“The University and the Needs of First-Generation College Students”**

Professor Frank C. Worrell; Marco A. Murillo, Postdoctoral Fellow, Academic Talent Development Program; Ms. Gail Kaufman; and Professor Angelica Stacy, Department of Chemistry and Associate Vice Provost for the Faculty, UC Berkeley

Tuesday, November 14, 2017,  
2:00 - 4:00 pm

**SAVE THE DATE!**

## Living Well in Retirement UCB Retirement Center Conference

**May 22, 2018**

**Hs. Lordships, Berkeley Marina**

**Registration available in early 2018**

Workshops by industry experts on fitness and health, housing, caregiving, technology, and more! Resources and exhibits from local organizations available throughout the day. Plus, time to engage with fellow retirees and colleagues.



Featured keynote address “Long Life in the 21st Century” by Laura L. Carstensen, the founding director of the Stanford Center on Longevity, and author of the book “A Long Bright Future: Happiness, Health, and Financial Security in an Age of Increased Longevity.”

For conference updates visit [www.retirement.berkeley.edu/conference2018](http://www.retirement.berkeley.edu/conference2018)

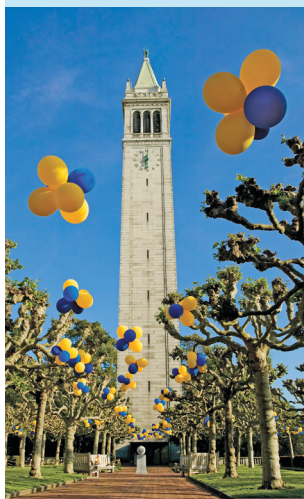
**SAVE THE DATE!**

## Chancellor’s Reception Honoring New Retirees

**October 10, 2017, 3:00 - 5:00 pm**

University House

*Retirees since October 2016 will receive an invitation by mail.*



Steps for staying connected as a new retiree

- Get your Retiree ID card and enjoy the many discounts & perks
- Subscribe to the CenterExpress eNewsletter — send your email to [ucbrc@berkeley.edu](mailto:ucbrc@berkeley.edu)
- Attend the New Retiree Reception October 10th
- Stop by the office to meet the team and learn about services like retiree bMail, parking and affiliated Retiree Association events and advocacy.
- Attend a “Learning in Retirement” lecture series
- Visit the website: <http://retirement.berkeley.edu>



# WORKSHOPS

Sessions will be held in 150 University Hall unless otherwise indicated.\*  
Advance registration is required as seating is limited.

## THE RESILIENT AGING LAB ONE-DAY WORKSHOP Tang Center\*

**October 6, 2017 8:30 am to 4:30 pm**

A three-step program that follows the phases of a transformational journey. This program provides practical tools and support for successfully transitioning into a new phase of life. Phase One is the one-day workshop which focuses on appreciating where you are and deciding where you want to go. Phase two and three include online facilitated community discussions and optional self-managed online networks. Offered at no cost as part of a pilot program. Continental breakfast and lunch included. Co-sponsored by the Resilient Aging Lab and the Be Well at Work program.

## GETTING STARTED WITH YOUR APPLE IPAD

University Hall, Room 198\*

**December 1, 8, 15, 2017 10:00 am - Noon**

Three-part series on how to make your iPad work for you; designed for beginning iPad users. It includes topics like: how to customize your iPad to make it work the way you would like; understanding the new OS 11; and exploring the App Store and the Internet.

## RETIREMENT TRANSITION

**January 17, 2018 1:30 - 4:30 pm**

We will share experiences and discuss issues and insights around the shift from a full-time job to being "retired." Key questions include: What does it mean to find structure in retirement? What are the issues around finding (or redefining) purpose, identity and meaning? How can we effectively deal with body and health changes? Offered in collaboration with Ashby Village, this interactive and participatory workshop will provide an opportunity to explore these and other questions.

## 7th ANNUAL FINANCIAL FAIR FOR PERSONAL FINANCE Alumni House\*

**March 15, 2018 10:00 am to 2:00 pm**

No registration required  
The Financial Fair is an opportunity to attend workshops, learn about campus resources, and visit with campus financial vendors. Sponsored by Work/Life Program (UHS), Human Resources, and the Retirement Center.

## THE GREAT DEBATE

**"Should I Move to a Senior Housing Community or Stay in My Home?"**

**March 22, 2018 2:30 - 4:00 pm**

This interactive seminar takes participants through factors to consider in making a decision to move into a retirement community or stay in your home, including weighing the pros and cons, costs, options, and questions to ask.

## OPTIONS FOR GROWING OLDER AT HOME

**March 29, 2018 2:30 - 4:00 pm**

According to AARP, nearly 90% of adults age 65+ want to stay in their current home and community as they age. This workshop will review the various options for staying in your home (e.g. the "village" concept, co-housing, rent space in your home, adapting your home), weighing out the pros and cons of each and considering the cost.



## SENIOR HOUSING OPTIONS

**April 12, 2018 2:30 - 4:00 pm**

Are you considering on moving into a retirement community and would like to better understand the options? This workshop will review the difference between the various senior living communities (e.g. independent living, senior (age restricted) apartments, continuing care communities or "life care," assisted living, skilled nursing), what they cost, and the types of questions to ask.

## ESTATE PLANNING CONSIDERATIONS

**April 17, 2018 1:00 - 2:30 pm**

Understand who needs estate planning assistance, the documents included and their purpose, estate taxes, retirement accounts, and the attorney-client relationship. A review of the Advanced Health Care Directive, Power of Attorney, Trust, Revocable Living Trusts, Last Testament and Will, and Estate Administration will be covered.

## ONLINE REGISTRATION FOR ALL PROGRAMS IS EASY

Registration is available three ways:

1. Online registration at [http://retirement.berkeley.edu/workshops\\_details](http://retirement.berkeley.edu/workshops_details)
  2. Email to [UCBRC@berkeley.edu](mailto:UCBRC@berkeley.edu)
  3. Stop by or call the Retirement Center at 510-642-5461
- For detailed online registration information  
<http://retirement.berkeley.edu/how-register-online-events-calendar>



### ESTATE PLANNING & LEGAL CLINIC

**April 26, 2018 2:30 - 5:00 pm**

Bring your questions about estate planning documents or planning for long-term care to a free 20-minute consultation with an attorney from Southworth Chavez & Day-Seiter LLP. Located in Orinda, the firm focuses on Estate Planning, Elder Law, Special Needs Planning, and Probate and Trust Administration.

### THE ABC'S OF LONG TERM CARE

**May 10, 2018 2:30 - 4:00 pm**

This workshop describes the differences between Medicare coverage and long term care; explains ways of getting long term care and options for financing it; focuses on the features as well as the pros and cons of long term care insurance; and offers guidelines for purchasing long term care insurance.

## Big Thanks and Big Move

We are grateful for the hundreds of donors who gave generously raising nearly \$37,000 in support of the Retirement Center programs and Retiree Associations. Thank you! We depend upon your ongoing support to help fund our programs and graciously accept donations throughout the year. To donate now, visit our website at [www.retirement.berkeley.edu/donate](http://www.retirement.berkeley.edu/donate) or, mail your donation by check made payable to UC Berkeley Retirement Center to 101 University Hall, Berkeley, CA 94720-1550. Be on the lookout for our annual appeal mailing which will be sent in November 2017.

### THE BIG GIVE MAKES A BIG MOVE!

This summer, a Big Give Steering Committee with members from University Development and Alumni Relations, Student Affairs, the undergrad population, and several departments and schools met and deliberated over the strategic timing of Big Give, ultimately deciding to move the campus's annual Big Give online fundraising event to the springtime. Last year, the Big Give campaign raised \$11,678,652 from 9,667 gifts! The Retirement Center is proud to be part of this annual philanthropic event. Watch for details on how to be part of this one-day event supporting all UC Berkeley's programs on March 8, 2018.

The Retirement Center will again host an **Open House, from 9:00 am to 4:00 pm on March 8th**, in conjunction with the Big Give. No need to register or donate, just stop by the Center anytime during the day for refreshments and conversation.



## Belmont Village Albany Senior Living In Affiliation with UC Berkeley

Over 1000 people attended the grand opening of Belmont Village, August 3-6th, 2017, and set a new record for attendance. A ribbon-cutting ceremony was held, which felt much like a family reunion, as visitors saw old friends who they may have worked with and/or hadn't seen in years. Most of the first residents are affiliated with Cal, either as alumni, emeritus or parents of faculty or staff. Visual connections to campus life can be seen throughout, including the UCB Dept. of Art Practice student gallery, the photo timeline

of the 150 years of Cal history and a quilt of UC t-shirts made and donated by Patti Owen, on display in the library. This work is the result of the Joint Planning Committee made up of UCB, LBNL, UCOP retirees and staff of Belmont, over the last couple of years. The Retirement Center retiree leadership will continue coordinating with Belmont Village Albany to develop programs and create opportunities, with a focus on art and culture, lifelong learning and student/elder intergenerational learning.

*Left: Michelle Moros (Exc. Dir., BVA), George Chang (Professor Emeritus), Robert Cajina, Raymond Miles (Professor Emeritus), Soo In Lee, Jade Lee (UCB Alum), Bee Chu Chen, Patricia Will (CEO, BV), Peggy McQuaid (Mayor, Albany), Angelica Stacy (AVC, Faculty Equity & Welfare). Above: Handmade quilt by Patti Owen made of UC event t-shirts on display in BV library.*

UC Berkeley is not financially or legally involved with Belmont Village Albany and has no responsibility or liability for its operation.





# Celebrating Retiree Talent, Leadership & Vision

**F**rom inception to reality, emeriti and retirees have provided the talent, leadership and vision that build the success of the Retirement Center. Enjoy a few examples of ongoing contributions and some highlights from this year on behalf of our community and the Retirement Center.

**Don Grether and Pat Pelfrey,** members of the Belmont Village



Joint Planning Committee developed a training module on a brief history of UC, Cal and LBNL, as well as an overview of our affiliation agreement with Belmont Village. This training is part

of building in the culture of UC into the “DNA” of the community and will be offered as ongoing training for all new staff. Don and Pat have been long-term volunteers having both served on the UCBRC Advisory board, Don for three years and Pat for nine. As board member and past president of the EX-Ls, Don is also active in representing LBNL retirees on CUCRA. Pat supported UCOP retirees as president and board member on PARRA, and as PARRA’s representative to CUCRA for several years.

**Phil & Carolyn Cowan,** Professors Emeritus/a, Department of Psychology



collaborated with UCBEA and UCBRC to facilitate two interactive discussions with other emeriti couples in

retirement. Phil and Carolyn are retirees themselves and have had a lifelong interest in couples at various stages of life. Their contributions resulted in the development of a “Retirement and Your Relationship” fact sheet on our website (see link below) and will continue with a survey to explore additional ways to assist couples in retirement transitions. <http://retirement.berkeley.edu/retirement-planning/retirement-and-your-relationship>

**Iola James and Patricia Hardy,** long-time UCRAB Board members, have led UCRAB’s efforts to help low-income graduates of Oakland high schools attend college. While



serving as UCRAB’s President and Trip/Event Director, Iola launched these efforts by setting aside a portion of the proceeds from UCRAB’s annual “Day at the Races” for donation to the UC President’s Office for student scholarships.

Patricia, who became UCRAB’s Scholarship Coordinator after serving as Luncheon and Speaker Coordinator for a number of years, has expanded support for

low-income college students by publicizing opportunities for UCRAB members to serve as Mentors. Leading by example, Patricia was the first UCRAB member to sign up as a Mentor for students participating in the Oakland Promise/East Bay College Fund. <http://retirement.berkeley.edu/ucrab/service>

**Donald “Al” Riley,** 2017

Distinguished Emeritus of the Year, founding member of UCBRC and co-founder of the popular Learning in Retirement Program,



remains an active LIR committee member developing programs that keep us engaged in lifelong

learning. Al inspires us with his energetic, yet humble approach to post-retirement scholarship, teaching, and service. To read more about his numerous accomplishments and the Dickenson and Panuzio award winners, see: <http://retirement.berkeley.edu/emmeriti-award-recipients-2017-18>

**Emeriti Sheldon “Shelly”**

**Zedeck** led multiple efforts in his tenure as Emeriti Association President, including establishing an all inclusive Emeriti Association where all emeriti are



automatic members, a “Legacy Project” to develop short archive videos of emeriti work, engaging in

efforts to better understand the unique challenges faced by couples in retirement transitions and energizing the 30+ Emeriti Representatives to take on issues such as emeriti office space.

# Stay Informed — Be Connected

Retirees **Mary Graham** and **Pat Hom** took the lead this year in bringing educational classes to fellow retirees. Both helped facilitate a new workshop for recently retired staff on “Retirement Transition” along with Ashby Village volunteer Joel Kaufmann, which will be offered again in January 2018. Pat also developed and taught a series of iPad workshops for beginners offered in the fall which will be repeated again in December 2017.



In addition to her leadership as UCBRC Advisory Board Chair and UCRAB board member, **Patti Owen** gave her time and talent to create a quilt made from historic UC t-shirts, currently on display in the Belmont Village Albany library.



**Vicky Jared**, LBNL retiree and outgoing EX-Ls Activities Chair for the past 13 years has been “absolutely essential” to the success of the EX-Ls luncheons and other events.



**Lynn Bailiff**, UCRAB President gives tirelessly to support UC retirees. None is more apparent than his work in developing the CUCRA systemwide UC Retiree Activity Survey. His insight and attention to detail in creating the instrument and analyzing the results of the survey were essential to this effort. The report of the UC Retiree Activity Survey comes out later this fall and illustrates well the value that UC retirees add to their communities and to the mission of UC, like many of the retirees included here in these pages!



**SUBSCRIBE FOR FREE**

The CenterExpress is our bi-weekly eNewsletter providing timely information about our Learning in Retirement series and wellness seminars, a curated list of activities on campus we think you may find enjoyable, Cal Connections perks and discounts, as well as interesting articles on trends in retirement. It's easy to subscribe! Just email [UCBRC@berkeley.edu](mailto:UCBRC@berkeley.edu) with your name and email address. Past editions of the CenterExpress can be found in our News Archive at <http://retirement.berkeley.edu/news-archive>.

## NETWORK WITH SOCIAL CONNECTIONS

Our Retiree Associations' events and activities provide opportunities to connect with colleagues and engage in lifelong learning. Part of your membership in an association includes statewide advocacy through CUCRA and CUCEA. See links below for details. Find out more online about our Associations at <http://retirement.berkeley.edu/join>.



### UC BERKELEY EMERITI ASSOCIATION (UCBEA)

UC Berkeley emeriti are automatically members of UCBEA and are encouraged to donate annually. <http://retirement.berkeley.edu/ucbea>  
[ucbea@berkeley.edu](mailto:ucbea@berkeley.edu)



### UC RETIREES' ASSOCIATION AT BERKELEY (UCRAB)

Membership is open to all retirees and emeriti from any UC campus, and active faculty and staff eligible for retirement. Dues: \$20 annually; \$35 for 2 years; \$50 for 3 years  
<http://retirement.berkeley.edu/ucrab>  
[ucrab@berkeley.edu](mailto:ucrab@berkeley.edu)



### LAWRENCE BERKELEY LAB RETIREES ASSOCIATION (EX-LS)

All retirees of LBNL, and their spouse or domestic partner, are automatically members of the EX-Ls and are encouraged to make annual donations.  
<http://retirement.berkeley.edu/ex-ls>  
[ex-ls@berkeley.edu](mailto:ex-ls@berkeley.edu)



### PRESIDENT'S AND REGENTS' RETIREE ASSOCIATION (PARRA)

All retirees of UCOP are automatically members of PARRA and are encouraged to pay \$10 voluntary dues annually.  
<http://retirement.berkeley.edu/parra>  
[jdolgonas@yahoo.com](mailto:jdolgonas@yahoo.com)

### COUNCIL OF UNIVERSITY OF CALIFORNIA RETIREMENT ASSOCIATIONS (CUCRA)

<http://cucra.ucsd.edu/>

### COUNCIL OF UNIVERSITY OF CALIFORNIA EMERITI ASSOCIATIONS (CUCEA)

<http://cucea.ucsd.edu/>

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101 University Hall  
Berkeley, CA 94720-1550

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# Cal CONNECTIONS

To take advantage of special offers you must use a Retiree ID card that identifies you as retired from UCB, LBNL or UCOP, or their surviving spouse or partner. To obtain your free card, come by the Center between 1:00 – 4:00 pm daily, or call 510-642-5461, or email [UCBRC@berkeley.edu](mailto:UCBRC@berkeley.edu).

## SELECTED CAL CONNECTIONS

- 20/20 Vision Plan discount at University Eye Center
- Free admission and discounts at the Berkeley Art Museum & Pacific Film Archive (BAMPFA)
- Discount in Annual Membership at the UC Berkeley Botanical Garden
- Cal Athletics season tickets discount
- Discounts on select Cal Performance events
- Cal Rec Center annual membership discount
- Retiree bMail service with 5TB of storage and access to lynda.com
- Access to campus Health Care Facilitator
- Free UCB library card
- Music Department performance discounts
- Osher Lifelong Learning Institute membership discount
- 10% Cal Student Store discount
- Membership discounts at The Faculty Club and the Women's Faculty Club
- Discounted campus parking permits

Visit [http://retirement.berkeley.edu/id\\_card](http://retirement.berkeley.edu/id_card) for details on any of these Cal Connections.



### CONTACT US

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94720-1550  
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Web: [retirement.berkeley.edu](http://retirement.berkeley.edu)



### RETIREE BMAIL

For a low annual fee retirees of Berkeley, UCOP and LBNL can have a @berkeley.edu bMail account. Retiree bMail comes with campus tech support, 5TB of storage space, anti-virus software downloads, access to lynda.com, and more! Application and payment information is available at <http://retirement.berkeley.edu/bmail>.



### OFFICE HOURS

Office hours run Monday through Friday, 1:00 - 4:00 pm excluding holidays and campus closures. As a small office, occasionally we must close during this time. Please call ahead to 510-642-5461 to confirm staff will be available to assist you.