RETIREMENT RESOURCE GUIDE
For Later-Career Faculty and Retired Faculty

Whether you are a later-career faculty member gathering information about the retirement process, or a retired faculty member who wants to find out about ways to remain connected to campus, this guide is designed to provide you with a quick overview of the resources available at UC Berkeley.

EMERITI PRIVILEGES AND BENEFITS

Did you know as an emeritus/a you ...

- Continue membership and voting rights in the Academic Senate.
- Have lifetime email and library privileges, and access to software.
- Are eligible to serve on graduate degree committees.
- Continue departmental membership; voting rights vary by department.
- Maintain principal investigator status on grants.
- May use the name of the vacated endowed chair position in your academic title.
- May be recalled or volunteer for teaching, research and service.
- May participate in the Emeriti Research Enabling Grant program.
- Have reduced rates on parking permits, both daily and central campus.
- Are granted automatic membership in the UCB Emeriti Association.
- Are encouraged to join the UCB Emeriti Academy.

For a complete description of all the emeriti privileges and benefits visit the **Faculty Retirement Resources-webpage**.

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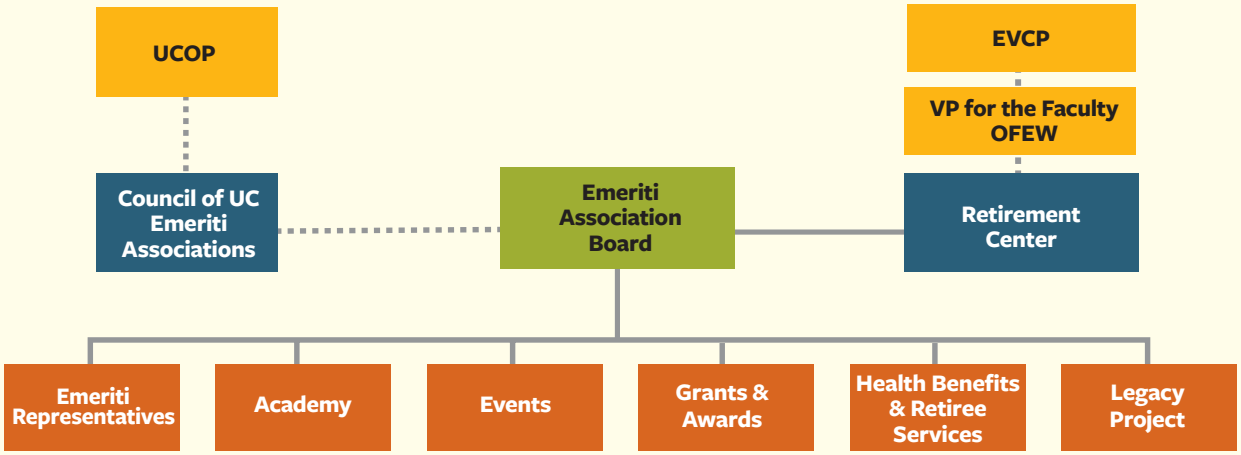
Organizations Supporting Later-Career and Retired Faculty



UC Berkeley Emeriti Association (UCBEA)

UCBEA serves as an advocate for emeriti (campus- and system-wide), supports emeriti wishing to remain engaged with the research, teaching and service missions of the University, and provides opportunities for professional and social engagement. It:

- Builds an interdisciplinary community through lecture luncheons and other events.
- Administers small emeriti research-enabling grants.
- Manages awards recognizing emeriti contributions to the university.
- Facilitates the Emeriti Legacy Project documenting faculty careers at Berkeley.
- Advocates for its members on issues such as health insurance benefits and the operation of the Retirement Administration Service Center (RASC).
- Provides leadership support for the Emeriti Representatives and the Emeriti Academy.
- Emeriti Association webpage.

Emeriti Representatives

- Foster a sense of community among emeriti within the department.
- Determine and promote best practices to department chairs.
- Advocate for and educate chairs on emeriti matters.
- Share information about Emeriti Association and Academy activities with emeriti and later-career faculty.
- Serve as a resource for emeriti and pre-retirement faculty, providing guidance on contacts and support services.
- Emeriti Representatives webpage

UC Berkeley Emeriti Academy

- Facilitates mentoring opportunities for emeriti.
- Supports interdisciplinary team-teaching.
- Showcases emeriti work with students through annual events such as the Emeriti as Mentors Poster Session.
- Hosts interdisciplinary events (e.g., public discussion panels).
- All emeriti are eligible to join the Academy through the completion of a short enrollment form.
- Emeriti Academy website

UC Berkeley Office for Faculty Equity & Welfare (OFEW)

Associate Vice Provost and Faculty Retirement Liaison support and provide guidance to faculty on issues of retirement:

- The Faculty Late Career and Retirement Liaison meets with later-career faculty for confidential consultations re: retirement.
- OFEW gives deans and chairs resources to ensure later-career faculty's smooth transition to retirement.
- OFEW website

UC Berkeley Retirement Center (UCBRC)

UCBRC supports retirees and those planning to retire from UC Berkeley, Lawrence Berkeley National Lab and UC Office of the President to live well in retirement:

- Fosters lifelong learning through a variety of learning Series.
- Provides resources and referrals for pre-retirement and retirement questions.
- Facilitates retirement-related perks and discounts.
- UCBRC website

UC Retirement Administration Service Center (RASC)

The **UC Retirement Administration Service Center** (RASC) is the only office that can officially provide retirement counseling and information on pension and benefits. This is the case for both pre-retirement planning as well as questions regarding retirement benefits. The resources listed on this and the following page provide an overview what is available to UCB faculty. While the Retirement Center cannot provide counseling, we can direct inquiries to the appropriate University resource.

- **UCnet: Step-by-Step Process for Getting Ready to Retire**
  The most current and comprehensive information about planning for retirement can be found on the UCnet website under **Compensation and Benefits**.
- **MyUCRetirement: Educational Resources Related to Retirement Finances**
  MyUCRetirement provides resources to help plan for financial and health care benefits in retirement.
- The **Pathway to Retirement** webpage lists **comprehensive retirement education events**.

Pathway Agreement and Faculty Retirement Liaison

The Office of the Vice Provost for the Faculty introduced a UC Berkeley-specific option for faculty who intend to retire called A Pathway to Retirement Agreement:

- This agreement is designed to support ladder-rank faculty with a smooth transition from everyday expectations in research, teaching, and service to an engagement with the university tailored to a faculty member's individual circumstances.
- For more information about this option and other emeriti-related benefits visit the Later Career and Planning for Retirement webpage.
- For a confidential conversation about the pathway agreement process, please contact the Faculty Late Career and Retirement Liaison.

Faculty Thriving in Retirement Workshop

This workshop is designed to go beyond the nuts and bolts of retirement and explore the more personal aspects of transitioning to retirement. Topics include:

- How to continue academic interests in retirement.
- Relationships with non-retiring colleagues.
- What this transition may be like for faculty members and their families:
  - Faculty family members/partners are strongly encouraged to attend.
  - Recently retired faculty are welcome to join.
- For the most current workshop schedule, visit the Faculty Thriving in Retirement event page. Contact the Academy at emeritiacademy@berkeley.edu for more information.

Who to Contact About Issues in Retirement

- The UC Berkeley Retirement Center compiled this comprehensive annotated list of offices on and off campus, which provide support for retirement-related questions and issues.
- The list includes contact information for each office.

Troubleshooting Pre- or Post-Retirement Issues

- For advice on how to address common pre- or post-retirement issues, visit Troubleshooting pre/post retirement issues.

UC Retirement Frequently Asked Questions

- The UC Retirement Frequently Asked Questions-resource is intended to give general guidance, ***it does not replace retirement counseling by a RASC Retirement Counselor.***

UC Berkeley Perks and Discounts Available to All Retirees

- For more information on the kind of perks and discounts available to all retirees, visit: retirement.berkeley.edu/retiree_id

There are many opportunities for retired faculty to attend lectures and panel discussions organized by the Retirement Center, the Emeriti Association and the Emeriti Academy.

Visit the various programs listed below to learn more about opportunities for engagement.

Learning in Retirement Program (LIR)

The Learning in Retirement Program Committee, an interdisciplinary team of retired emeriti, designs and organizes the program:

- LIR offers courses in a variety of subject fields, including natural sciences, engineering, social sciences, the humanities and the arts.
- For more information and to register, go to the Learning in Retirement (LIR) webpage or call 510-642-5461.

UC Retiree Learning Series

Partnering with Bay Area retirement communities Belmont Village and Front Porch, the series expands lifelong learning opportunities to retirees while providing an opportunity to learn more about Bay Area retirement communities. For more information on the series and how to register, visit the UC Retiree Learning Series webpage or call 510-642-5461.

UCB/UCSF Retiree Learning Series

The program features topics of both medical and general interest, building upon the world-renowned expertise of UCSF and UC Berkeley. For more information on the series and how to register, visit the UCB/UCSF retiree learning series webpage or call 510-642-5461.

The ***CenterExpress***, the Retirement Center's monthly newsletter, lists all upcoming events (send an email to ucbrc@berkeley.edu to be added to the mailing list).

Support for Undergraduates with Navigating Berkeley

UC Berkeley can be intimidating and challenging for undergraduate students to navigate. Each semester, the Emeriti Academy hosts panels on demystifying office hours and demystifying research. The panels on **Demystifying Office Hours: Advice from Faculty** aim at reducing barriers for undergraduate students to sign up for office hours with their professors. After each panel, students can request a one-time, one-on-one coaching session with an emeritus/a in their academic field of choice. We need emeriti volunteers to serve as a coach. Please contact the Emeriti Academy at emeritiacademy@berkeley.edu, if you're willing and available to volunteer.

Programs such as the **Undergraduate Research Apprentice Program** (URAP) or the Rausser College for Natural Resources's **Sponsored Projects for Undergraduate Research** (SPUR) are two examples of many other Berkeley programs where undergraduate students participate in research projects. Visit the Berkeley research website for a list of similar programs. For more information on URAP, email urap@berkeley.edu. For more information on SPUR, email spur@berkeley.edu.

Freshman and Sophomore Seminars (FSSP) emphasize interaction and discussion, providing a counterpoint to the learning experience in Berkeley's large lecture classes. These seminars offer students an unprecedented opportunity to explore a wide range of majors and even fields of study usually reserved for graduate students. For more information, email fssp@berkeley.edu.

Office for Faculty Equity and Welfare

200 California Hall, MC #1500
Berkeley, CA 94720-1500
Phone: 510-642-1935
Email: ofew@berkeley.edu

UC Berkeley Retirement Center

Banway Building, Suite 200
2111 Bancroft Way, Berkeley, CA 94720-1550
Phone: 510-642-5461
Email: ucbrc@berkeley.edu

In-Person Office Hours:
The Retirement Center offers in-person office hours. For the most up-to-date schedule, please visit the Center's Contact Us-webpage.

UC Berkeley Emeriti Association

Email: ucbea@berkeley.edu

UC Berkeley Emeriti Academy

Phone: 510-642-5461
Email: emeritiacademy@berkeley.edu

How to Keep in Touch

CenterExpress Newsletter for all retirees

- Includes announcements for lectures, programs and other important retirement-related information.
- Send an email to ucbrc@berkeley.edu to be added to the mailing list.

UCB Emeriti Association email list

- All emeriti are automatically a member of the Association and are added to the Association's listserv for announcements about lectures and items related to emeriti advocacy.
- Email ucbrc@berkeley.edu if you'd like your personal email added.

UCB Emeriti Academy email list

- Members of the Emeriti Academy receive notices about Academy events and teaching and mentoring opportunities.
- All emeriti are eligible to join the Academy by completing a short enrollment form.

Connect with Your Department about Emeriti Issues

- Contact your Department Emeriti Representative:
- Click on this link for a list of current Emeriti Reps

Survey of UC Berkeley Emeriti Activities 2018-21

ACTIVITES ON CAMPUS

Reported by 317 survey respondents

SERVICE

42%

Reported offering service to campus departments

MENTORING

70%

Reported serving in an informal and/or formal mentoring role

TEACHING

21%

Reported continuing to teach graduate and undergraduate courses

SCHOLARLY WORKS

Reported by 287 survey respondents

68%

Reported publishing one or more journal articles

35%

Reported publishing one or more books

RESEARCH FUNDING & DONATIONS

Of all Emeriti over 3-year fiscal cycle

$ 94.7 M

New and ongoing research generated by Emeriti PIs

$ 106 M

Total gifts made by Emeriti to UCB

A full summary of the UCB report can be found here:
retirement.berkeley.edu/ucbea