



REPORTER

A publication of the California State University Emeritus and Retired Faculty Association

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legislative
- William E. Schlosser**
(Northridge) *retirement concerns*
- Elizabeth H. Brady**
(Northridge) *membership*
- Mary Gornly** (Los Angeles)
liaison to CFA
- Len Mathy** (Los Angeles)
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- Hank Peterson** (Chico)
- James E. Ryan** (Long Beach)
- Bill Smith** (Pomona)

Ralph Bigelow (Fullerton)

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Four CSU-ERFA Presidents Meet at State Council in December

Left to right:
Emmett Long,
current president
Sid Albert, *founding president*
Milt Dobkin, *past president*
Jack Byrom, *immediate past president*



Photo by Linda Zimmerman

Long Limns the Legalities

Many emeriti have expressed to me some uncertainty about the nature of CSU-ERFA, sometimes confusing it with local campus emeriti groups. CSU-ERFA is an individual membership organization of retirees from all campuses of the California State University. Campus retiree organizations, where they exist, are autonomous institutions, not chapters of CSU-ERFA.

Campus retiree organizations may choose to affiliate with CSU-ERFA, and when they do, CSU-ERFA rebates a portion of the dues paid to CSU-ERFA to the local organization. We therefore maintain a supportive relationship with campus retiree groups. Some of these organizations limit their membership to emeriti professors; others add administrators; and still others welcome all retired staff as members. CSU-ERFA represents the interests of all our members. In doing so, we provide representation and action on all matters of importance to retirees.

The CSU-ERFA Constitution, Art. II, covers our purposes (excerpts cited):

(Continued on page 2)

Consulting Program Underway

After months of preparation, CSU-ERFA has launched the Consultant Program. In the first few weeks, 50 members indicated an interest, and the office received a number of responses from prospective employers.

The association sent the program brochure, with examples of consultant services, to over 3,000 prospective employers: academic institutions, corporations, foundations, governmental agencies, engineering firms, and others concerned with applied science and technology. We are also exploring ways to broaden the base of employers by working with agencies that specialize in finding and placing consultants.

All members and prospective members also received the brochure.

Members who have not yet sought admission to the consultant program should call or write the CSU-ERFA office for the appropriate forms.

We encourage nonmembers interested in the consultant program to request information about CSU-ERFA as only members are eligible for listing in the association's database as consultants. [RK]

State Council to Meet Saturday, May 4, 1996, 10 a.m to 4 p.m.

Holiday Inn, Oakland Airport, 500 Hegenberger Road, Oakland 94621 (510) 562-5311

Each campus may send one voting representative for every 75 CSU-ERFA members. Expenses reimbursed, at the lowest airfare (or mileage), for one representative per campus, excluding executive committee members.

Legislative Report

AB 3252 (Kaloogian): Would establish the Public Employees' Defined Contribution System, compulsory after July 1, 1997, for all who would have otherwise been state miscellaneous members of PERS. Present state employees could opt to stay in PERS or join the defined contribution system.

PERS is a defined benefit system, which promises that certain benefits will accrue each year, expressed as a percentage of final pay. A defined contribution plan says that a certain percentage of pay will be contributed by the member each year and credited to the employee's individual account. The individual selects the investment mediums for his or her account and takes the investment risk. Upon vesting, after a certain number of years, the account balance is disbursed, as a lump sum or annuity. No certain level of retirement benefit is guaranteed. No COLAs will be paid.

Some argue that the advantages of defined benefit plans are portability and the possibility of higher investment returns from aggressive individual investment. Others argue that the individual often cannot take these high risks, so ends up with a smaller return. Employers get rid of the risk, and make smaller contributions. In this bill, employers contribute 7.5% of gross compensation; employees, 4.5%.

The new board and system would be separate from PERS. Prop. 162 could cease to protect beneficiaries. There is no provision for member representation on the board; the trust fund would be in the state treasury. In time, the hard-won PERS system could expire.

How would this affect current retirees? It will weaken the existing PERS system because employee contributions will continuously dwindle. It will cost more to run two systems than one. Employees forced in the new plan will have inferior benefits.

The PERS board unanimously voted to oppose the bill after a presentation by ERFA's Wilma Krebs on behalf of the State Coalition of Retired Employees.

The hearing on AB 3252 is scheduled for Apr. 10 (Assembly PERS Committee). Write or phone 916-322-4320.

Legal Services as a Potential Member

Benefit: Midwest Legal Services has approached retiree organizations to see if they would favor having PERS offer a group legal service plan that members could opt to join for approximately \$15 a month. The State Department of Personnel Administration has offered such a plan to active employee for three years with a good response. Costs ranged from \$9 to \$15 a month.

Typical services would include toll-free phone consultation with 24-hour emer-

gency service. Over 440 California attorneys would offer a wide array of legal services. The plan would pay 100% of fees of network attorneys, and reimburse outside attorneys up to indemnity limits.

Advantages appear to be comprehensive legal services at reduced cost, convenient and accessible legal advice, reduction in anxiety, and in time spent searching for an attorney.

Please let CSU-ERFA know if you favor this option for legal services for PERS retirees.

The Future of PERS-Care and PERS-Choice:

PERS engaged a consultant to review PPO/Indemnity self-funded health plans. ERFA responded with a summary of advantages, but identified the problem of increased costs to members. Some members have dropped PERS-Care, leaving a potentially higher-cost group in the plan, which could bring higher premiums. Also, many members are not aware of the PERS-Choice alternative fee-for-service plan.

We felt both should be preserved, and offered approaches to this end. We would like to hear from members about this.

[WK]



Proposition 203 Passed

Sixty-two percent of California voters supported Prop. 203, the Public Education Facilities Bond Act, at the Mar. 26 election. The Executive Committee of CSU-ERFA had earlier unanimously endorsed the measure. President Emmett Long pointed out that the proposition addressed *one of the most significant problems for public education at all levels:* the lack of resources for construction, restoration, and earthquake retrofitting.

Prop. 203 provides for a \$3 billion bond issue to address the construction needs of California's K-12 schools, community colleges, and public universities. Of this amount, \$975 million is designated for higher education.

CSU-ERFA is proud to have joined with a coalition of business, taxpayers, educators, seniors, public safety officers, and parents in supporting Prop. 203. [MN]

President Long...(Continued from page 1)

The purposes of this association shall be

Sec. 1. To serve as an advocate of the interests of emeritus and retired faculty in all matters relating to the general welfare of these faculty in the California State University.

Sec. 2. To assist in establishing the emeritus and retired faculty of California State University as continuing and participating members of the academic community.

Sec. 3. To provide opportunities for maintaining professional relations with colleagues both within and without the university system....

Sec. 6. To encourage the adoption of enlightened retirement policies and practices throughout the University and to proffer counsel on retirement to the active faculty....

Sec. 8. To examine the public laws and policies that relate to the maintenance of the quality of life of retired faculty and work for, or support, those laws and policies which protect the quality of life of retired faculty.

We are aware that CSU retirees who were not professors are often concerned about their absence in the CSU-ERFA name and in the purposes statement in our constitution. This has historical roots and also relates to differing membership requirements of campus emeriti organizations. Although CSU-ERFA began as a state association for emeriti professors, we changed our constitution several years ago in recognition of the fact these differences exist and in an effort to encourage all campus retiree organizations to affiliate with us.

—Emmett Long, Fullerton

Employing "Golden Handshake" Emeriti:

At its September 1995 meeting, the executive committee established a special committee (Milton Dobkin, Max Norton, and Robert Kully) to meet with Assemblyman Sal Canella to present the assemblyman with a proposal to amend Sec. 22732, Calif. Education Code: *Remove the special restriction on post-retirement of CSU faculty who received four years of additional service credit in 1992.*

CSU-ERFA took the position that former faculty of the CSU provide a pool of talent and expertise that cannot be used owing to restrictions imposed by this retirement agreement.

Assemblyman Canella is no longer on the PERS committee. When we learned this, Max Norton, on behalf of CSU-ERFA, met with Canella's office and found that Mr. Canella presented the amendment to the current chair of the PERS committee, requesting its adoption. His request was denied on the basis that the proposal did not have sufficient support for passage.

The special committee has instructed President Long to write Mr. Canella expressing our gratitude for his efforts towards this issue and for his general support for the CSU.

The executive committee has since instructed the committee to pursue an appropriate sponsor in the California State Senate for the amendment. [MN]

Your Staff informs...

..and seeks info from FERPers:

The CSU has begun denying faculty members entry into the Faculty Early Retirement Program if the applicant is not 55 at the time of application. The CSU-CFA agreement states that the person must be 55 to *participate*, not to apply. Further, the applicant must notify the CSU of intent to participate at least six months before the academic year of participating in FERP. This interpretation would prohibit many members from entry in FERP until age 56 or 57.

CFA staff requests information from *current* or *former* FERPers who applied before age 55. **Please forward such information to CSU-ERFA by fax (818-718-7680), e-mail (csuerfa@csun.edu), or phone (818-718-7996).** CSU-ERFA wants to assist CFA in resisting the interpretation about applying at 55. [Staff]

Changes to Bylaws Proposed

The Bylaws Review Committee has reviewed the Bylaws and Constitution concentrating on the governance structure, procedures, and personnel to reflect current practices and to anticipate future needs. Tentative recommendations, to be presented to the State Council in May, include:

1. merging the current executive committee with the State Council, replacing the current executive committee membership with members of the present steering committee plus four at-large members. The proposed executive committee would then consist of the officers, the at-large members, and the executive director ex-officio (non-voting). The State Council would remain as the governing body;
2. providing for increased attention to the concerns of out-of-state members;
3. appointing an AAUP Liaison and an association archivist;
4. establishing an honorary State Council membership; and
5. providing a detailed procedure for developing the annual budget.

Members may suggest revisions or additions to the Bylaws to the committee for consideration prior to the May 4 meeting of the State Council. Timely suggestions will receive full consideration by the committee: Jim Ryan (LB), chair, John Houk (LA), Gordon Stanton (SB), and ex-officio members Emmett Long (president) and Bob Kully (executive director). [JR]

Nominees Presented

The nominating committee reports that the following nominees will be presented to the State Council on May 4, 1996:

- Emmett Long** (Ful), *president*
Robert Maurer (Chico), *vice president*
C. Dale Johnson (SD), *secretary*
Edwin Bartenstein (Nor), *treasurer*
Wilma Krebs (Sac), *legislative chair*
Elizabeth Brady (Nor), *membership chair*
Herbert Rutemiller (Ful), *pre- and post-retirement concerns chair*
Don Moore (LA), *liaison to the CFA*
Leonard Mathy (LA), *liaison to the CSU Senate*
Ralph Bigelow (Ful), *Reporter editor*
Bernice Biggs (SF), **Mary Gormly** (LA), **Eleanor Price** (DH), *members at large*

The nominating committee (Milt Dobkin, chair, Robert Maurer, and Bob Smith) advises that the following members continue on the executive committee from prior elections:

- Kurt Bohnsack** (SD), **William Gustafson** (SJ), **Max Norton** (Stan), **Hank Peterson** (Chico), **Lester Roth** (Fres), and **James Ryan** (LB), *members at large*; **Milt Dobkin** (Hum), *immediate past president*; and **Robert Kully** (LA), *executive director*

Chair's note: Robert Maurer did not participate in the deliberation leading to his nomination. Further, the chair urges that the two at-large members leaving office as a result of drawing short terms (Bylaws provision) be used in committee assignments lest their talents be lost to the association.

N.B. The Bylaws permit nominations from the floor at the election meeting May 4. [MD]

Bigelow Appointed Editor

Ralph Bigelow has been appointed editor of the *Reporter* by President Long. Our bylaws require that the editor stand for election by the State Council annually; his name will be on the May 4 ballot.

Emeritus dean of admissions and records at Fullerton, Ralph came to the campus in 1966 from the then San Fernando Valley State College. He earned the Ph.D at USC. [EL]



The CSU-ERFA office in Northridge is now **online!** You may now reach us by e-

mail as well as by phone or fax. We check the inbox daily and respond promptly, believing that e-mail enables us to communicate efficiently with the executive committee and the membership.

Please send us your e-mail address so that we may add you to our address book. Our address is: **csuerfa@csun.edu**

Perhaps there's a World Wide Web site in our future!

Your Liaison to the Academic Senate Reports—

The CSU Academic Senate recently received several reports and position papers that could have a substantial influence on the future of the CSU.

Chair Jim Highsmith reported on a faculty productivity document developed jointly by the CSU and the State University of New York academic senates, and the CFA and UUP (the SUNY union). In related matters, the faculty affairs committee of the CSU Senate presented three draft papers on (1) faculty productivity and accountability, (2) The CSU faculty reward system, and (3) a statement on increased demands on faculty time. The faculty affairs committee also presented a paper, "New Faculty Orientation and Mentoring in the California State University."

The academic affairs committee is considering a draft report on changes in extension programs and continuing education and a report from the technology task force on the use of technology, mediated teaching, and learning. The committee also presented a report on the student fee policy changes the Trustees are considering. Discussion in the Senate with Chancellor Munitz led to concern about the level of fees and that differential fees could limit access to some high cost programs.

The Senate approved (1) a report of the subcommittee on K-16 curricular issues, (2) a resolution on liberal interpretation of the "fair use" of copyrighted material, and (3) a report opposing SB 1399 dealing with educational materials sold as required course materials.

Finally, Chancellor Munitz discussed Prop. 203, the educational bond issue on the Mar. 26 ballot, with the members of the Senate. [LM]

CFA Increases Retiree Participation

The California Faculty Association has amended its Bylaws to increase voting participation by retiree representatives. In the past, the CFA's chair of the committee on retired faculty had at times been invited to attend board meetings as a courtesy. The new rules provide election to that post by mail ballot of retired CFA members and full voting status on the Board of Directors. The elected retiree representative to the Assembly continues to be included in the Bylaws. Therefore, retired CFA members now have two votes in the Assembly.

The amendments also provide a new responsibility for the chair of the committee on retired faculty: to serve as liaison to the CSU-ERFA Executive Committee and State Council. (CSU-ERFA's liaison to the CFA will of course be welcome at CFA Board and Assembly meetings.)

Hank Peterson (Chico), the current chair of the CFA retired faculty committee, worked to shepherd these changes through the CFA Board and Assembly. Milt Dobkin (Hum), the current representative to the Assembly, assisted in the effort, which had strong support from CFA's Past-President Pat Nichelson (Nor).

Some CSU-ERFA members may note that, unlike the action of the CSU Senate on a related matter, these amendments were adopted without dissent. [MD]

In Memoriam

Fresno: Roger Tatarian
Long Beach: Edward Wright
Los Angeles: Dan R. Rankin
Northridge: Oral V. Porterfield
Pomona: Alan R. Sann
Sacramento: Norman R. Roth, Dorothy A. Sexter
San Diego: John R. Adams, Ernest B. O'Byrne
San Francisco: Inez M. Butler
San Jose: Fauneil "Fanny" Rinn, William B. Spring, Joyce Ward



Our understanding of the greatest matters will never be complete. —Herakleitos



Two stalwarts Commended

At its February 1996 meeting, the executive committee unanimously endorsed resolutions commending **Don Moore** and **Fred McMahan**.

Moore's service for many years as liaison to the CSU Senate "devoting countless hours to long, involved meetings . . . without vote" was cited in the resolution.

McMahan was designated *Editor Emeritus* for his 10 years as editor of the *Reporter*, serving without remuneration, engendering "the admiration and affection of his many fellow emeriti and colleagues."

Framed resolutions were presented to both, copies of which are displayed in the association's office in Northridge.

[ExecComm]

Have you moved? If so, please report your new address to the CSU-ERFA office (address above).

Forwarding and address correction requested

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