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Long-Term Care Program Fee Increases Trouble Members

By Ted Anagnoson, Editor

The CSU-ERFA office has received an unprecedented number of phone calls and messages concerning the recent Cal-PERS Long-Term Care Program increases of 15%-22%, announced in April and due to be implemented July 1. According to CalPERS, the increases are necessary because the program has an actuarial deficit of 33%. The increases will render the program sustainable over the long run, or at least that is the hope.

According to CalPERS, "all policies issued prior to 2005 with either lifetime benefits and/or inflation coverage will receive a 22 percent increase. All policies in this group with both lifetime benefits and inflation coverage will receive an additional annual increase of 5 percent per year beginning in July 2011. The annual 5 percent increase is expected to continue through 2014 but will be reviewed each year by CalPERS to determine if the annual increase is necessary to sustain the program. Any policy issued prior to 2005 with only non-lifetime benefits and all policies issued after 2005 will receive a single 15 percent increase."

Many members have had questions about the fee increases. One key question is whether to drop the program or stay with it. Here is the response of the editor and Don Cameron, CSU-ERFA executive director: "This depends upon your individual situation. Typically, the people who buy

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Statewide Senate Report: Shared Governance, Budget Woes, Legislative Intrusion

By William Blischke, CSU-ERFA ASCSU Liaison

The Statewide Senate (ASCSU) met on May 6-7, 2010. I was kicked out of the meeting at 1 pm on May 7th. Actually (now that I have your attention), the Senate goes into executive session to elect next year's leaders. Since I am a non-voting liaison, requiring me to leave at this point was entirely appropriate and legal. I wasn't surprised that none of you joined me in the peanut gallery during the plenary session. However, you missed some very important presentations and discussions.

Shared governance. In my four-plus decades of faculty and administrative involvement in the CSU, I have witnessed a roller coaster ride in terms of the relationships among faculty, administrators and staff. The "factions" have worked well together as colleagues at times and have been at serious odds at other times. My observation from this meeting is that at both the system level and at some campuses, we are at a low ebb.

The title of one of the resolutions says it all: "Objection to Unilateral Decision Making and the Pursuit of the "Culture of Compliance" in the CSU." The first Resolved clause states "That ASCSU notes the ***relentless*** move, over the past several years, toward unilateral administrative decision making and a "culture of compliance" within the CSU, as evidenced by the recent "deliverology"-based graduation initiatives, alternative policy-making venues… and other non-representative forms of decision making…" (As always, this resolution and the others that were passed are available in

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From the President...

The state of the state. To start with the obvious: These are not the happiest of times – not for the California economy and consequently not for the state budget and thus for the CSU. Regarding the latter, there has been enough unhappy news lately about possible cuts in programs, furlough days, non-renewal of part-time appointments, enrollment limits, etc., that each one of us retired folks probably has said at one point or another: "I'm so glad I don't have to deal with these problems any longer!" And yet each one of us, I am sure, worries at least to some degree about the future of his or her campus, and that of the system as a whole.

That does not mean that there is much we faculty retirees can do to turn things around. But as a retiree organization CSU-ERFA does try to exert a positive influence on events, most of all by carefully monitoring legislative developments in Sacramento and by stating our position whenever possible. I think our Legislative Affairs Committee, chaired by Alan Wade, does an excellent job in this regard.

CalPERS. As to news which touches us retirees more directly, we all are aware, of course, of CalPERS attracting a lot of attention lately, not only statewide, but nationally. (The Wall Street Journal, for example, quite regularly covers matters pertaining to CalPERS.) In this regard I want to express my appreciation to the guest speaker at our April State Council meeting, George Diehr (CSU San Marcos), currently Vice President of the CalPERS Board. He straight-forwardly addressed a number of issues, answered many questions and was able, I think, to leave all of us with a more positive outlook than the one we brought to the meeting. One important topic, of course, concerned the revisions of the long-term care policy which CalPERS has implemented. Regardless of how we, individually, feel about them, it doesn't seem that CalPERS had any choice but to go ahead with them.

State Council meeting. A few more comments relating to the State Council meeting: First, I am delighted that Don Cameron will continue to serve our organization as its executive director! CSU-ERFA has benefited greatly from his diligent and thoughtful efforts in that position.

Second, I was very pleased that the election of officers and confirmation of appointees (to committees and at-large positions) went so smoothly! To me this is proof of a true cooperative spirit guiding the Council.

Sidney Albert. Finally – and this item should perhaps have been at the top of the list – I want to point out how elated the whole assembly was that the founder of CSU-ERFA, Sidney Albert, was able to join us for the full length of the State Council meeting and add his thoughts to the discussions. I don't think Sidney will object to my mentioning that shortly before the meeting he had celebrated his 96th birthday! (To quote him: "96 is just 69 turned upside down.")

Finally, with my first year as ERFA President coming to an end, I want to thank the members of the Executive Committee, Don Cameron and the office staff, and everybody else who has worked with me during the year for making this job much easier for me than I had anticipated!

H. Dieter Renning
President, CSU-ERFA

Lifetime Membership in CSU-ERFA

CSU-ERFA has just added a new lifetime membership option. Upon payment of a one-time $1,000 fee, any current or new member can obtain a lifetime membership, with no further dues obligations. Lifetime members receive invitations to future State Council meetings and other special announcements and invitations, plus issues of *The CSU-ERFA Reporter*. CSU-ERFA President H. Dieter Renning is the first lifetime member, having just submitted the $1,000 fee.

CSU-ERFA has calculated that at $8 per month, the average amount for new members, a member retiring at 63 and paying for 25 years additionally would pay well over $2,000 in cumulative dues, making the $1,000 one-time payment a comparative bargain.

Benefits Q&A: When Should You Retire?

Part II: Practical Considerations

By Tom Donahue, Chair, CSU-ERFA Pre- and Post-Retirement Concerns Committee

In the last issue, we discussed when we may know that it is time to retire. The general notion is that there is an optimal time: when we wish to reduce our multiple responsibilities of pedagogue/expositor, researcher, and dutiful campus citizen in favor of, say, being a researcher only, it is time to lay down some of the load. In this issue we will report on some of the more practical matters that should concern us in deciding about retirement.

Our CalPERS pensions (as presently constituted; this may change in the future) are structured around an optimal retirement point as we arrive at or near age 63. After that age, the pension schedule provides for 2.5% raises each year a person ages, and CalPERS offers a 2% COLA as an alternative. In view of the fact that yearly the CSU in recent times has had difficulty in matching either of these figures, the decision to retire becomes a bit simpler: as one political science professor put it, "You lose money if you don't retire." Two considerations may then complicate a person's deliberations: first, whether or not to enter the Faculty Early Retirement Program – as long as it is provided – and second, when to begin one's Social Security stipend.

The Faculty Early Retirement Program has been crucially helpful in the transition to academic retirement. Most of us never lose the understanding that non-administrative salaries in the system are low (consult http://www.sfgate.com/webdb/csupay/, and confirm that at http://www.californiapensionreform.com). Despite the fact that there is now a bit of journalistic spectacle about some CalPERS pensions, your pension will probably be a reduced percentage of your particular salary at present. For the great majority, then, the much-needed FERP opportunity allows one to pay down his or her debts, as well as in some cases to begin a modest nest egg. The best advice on this matter is: if you retire too late to FERP, you have indeed retired too late. Lastly – the wisest people on the subject of retirement finances recommend that you start a supplemental retirement savings fund as early as possible in your employment, preferably with tax sheltered benefits.

Social Security. Second, if you accept your Social Security stipend before your "full" Social Security retirement age, you may have to return 50% of every dollar earned over $14,000 of that sum to the OASDI folks. Do consult to find your "full" retirement age (now 66 or later) and consider delaying your Social Security payment for the first years you are FERPing. CalPERS offers advice on this and related matters in its seminars throughout the state. It is a good idea to attend such a seminar at least once.

Now a less practical consideration: retirement is indeed a time of celebration and perhaps a slight bit of self-congratulation as well. Those looking back on the prospect of retirement once they have moved through it suggest that you find a way to reward yourself at the time or soon after. But – in the midst of the current shamelessly politicized attacks on our pensions, it wouldn't hurt to pause for a rather wistful reality check. (Continued at right)

PACE: An Alternative to Long-Term Care?

By David Humphers, CSU-ERFA Health Benefits Chair

Peter Szutu, president and CEO for the Center for Elders' Independence and the PACE4You organization attended the CalPERS Constituent Group meeting on March 11, and presented the Program of All-inclusive Care for Elderly (PACE) as a viable alternative to long-term care insurance.

According to Szutu, PACE is not an insurance program. He reports that PACE provides in-home care and assisted living arrangements for seniors at about the same payment rate as Medi-Cal. Medi-Cal is California's Medicaid program.

There are five PACE organizations in California, located in Los Angeles, Oakland, San Francisco, San Diego, and Sacramento. To be eligible for PACE services, a person must be: 55 years of age or older; certified by the state of California as needing nursing home care; able to live safely in the community; and a resident within a PACE service area. The goal of the PACE programs is to keep seniors in their homes in the community and out of nursing homes if at all possible. I am providing Mr. Szutu's response to my inquiry for CSU-ERFA members who may be interested in a possible alternative for long-term care. Contact Mr. Szutu directly for more information.

Peter Szutu's correspondence is as follows: "We currently have five independent PACE organizations in California. Each PACE organization may have multiple PACE Centers. We all have geographically defined service areas. For details of where PACE services may be accessed, visit www.CalPACE.org. For locations in other parts of the country, visit www.PACE4you.org. I do think PACE would be a viable option."

"PACE has been growing nationally much quicker than in California. Pennsylvania's nine PACE organizations have the entire state covered. The California state bureaucracy has been very challenging, slowing our growth with delays and now with furloughs...but we persevere. If CalPERS offered PACE services to its frail retirees, they might be able to avoid institutionalization and enjoy a higher quality of life. Please come and visit our centers or others around the state. They will be glad to show you how well we take care of our frail seniors. It was pleasure to have met all of you and the chance to share this great program with CalPERS."

Contact: Mr. Peter C. Szutu, MPH, President and CEO, Center for Elders' Independence, 510 17th Street, Suite 400, Oakland, CA 94612, Main: (510) 433-1150, Direct: (510) 452-8821, Mobile: (510) 710-8932.

Retirement is a long-sought destination; too few of us arrive there, and too few get to linger very long.

The Pre- and Post-Retirement Concerns Committee would like to provide one more Q & A column on this subject. Please send your remarks to Tom Donahue at dunnie10@sbcglobal.net.

Three Reactions to Donald Gerth's *The People's University*

We asked for volunteers to react to Don Gerth's new history of the CSU. Three short essays follow. The authors are Peter Buzanski, Professor of History (Emeritus) at San Jose State University, who taught from 1960 to 1996. The second is by Urban Whitaker, Professor of International Relations (Emeritus) at San Francisco State, who taught from 1954 to 1995. The third is by Judson A. Grenier, Professor of History (Emeritus) at CSU Dominguez Hills, who taught from 1966 to 1992.

Peter Buzanski: The Book Reveals a Picture of the Author as Much as It Does the CSU....

While Donald R. Gerth's thorough and detailed account of the CSU, beginning in the 1850s and carrying the story to 2009, leaves almost nothing unsaid, a picture of the author also emerges, the subject of this essay. Gerth served in the CSU from 1958-2003, the last twenty-seven years as president, first of Dominguez Hills, then of Sacramento. He knows the system from the inside and his expertise in political science gives him an invaluable historical perspective. Gerth does not mean to discuss himself, but in the almost seven hundred pages of text it would not be feasible not to expose attributes that contributed to his success not only within the CSU but also as president of two of the system's campuses.

Gerth reveals himself not only as a very capable administrator, having worked on several campuses and in the Chancellor's office prior to becoming president, but also as that rare administrator who sides with faculty on most issues, including compensation and academic freedom. Faculty at both campuses where Gerth served as president observed that his style of governance was unlike that of most administrators. Gerth believed in transparency long before that word gained currency. To achieve this openness Gerth consulted with everyone on probably more occasions than some would have wanted. This style of administration meant having more meetings than is usual, but the end result was that Gerth may well have been the most beloved campus president in the CSU.

He worked assiduously to implement Chancellor Ann Reynolds' goal to add to the CSU admission requirements (English, mathematics, US history and government, science and foreign languages) a visual and performing arts category. Perhaps the clearest insight into Gerth's character and behavior is seen in his response to the controversy that broke out in the 1990s on the CSU Sacramento campus regarding the ROTC posture on gay men. Gerth makes clear he had had five years of active military duty, was familiar with the Uniform Code of Military Justice, and had sat on a general court at the major military command level. Gerth, like many faculty members, wanted ROTC removed from the Sacramento campus, and as president so ruled. While some CSU Trustees wanted Gerth dismissed, he survived the furor, but on his retirement was told that the controversy was "the most serious crisis" of his presidency. Surely one factor that endeared Gerth to his faculty was the fact that unlike most university presidents, Gerth taught one class of political science each semester. Maintaining a hand in classroom teaching not only keeps the administrator current in subject matter but also brings a valuable perspective on the ever changing student perspective.

The 1960 Master Plan of Higher Education was silent on system-wide fund raising, and hitherto, the State Board of Education had prohibited private fund raising. During subsequent years, campus presidents developed external fund raising, which the Board of Trustees encouraged. In 2003 the CSU trustees made a significant change in the fund raising policy to which all campuses are required to adhere. Simply stated it means that the campus presidents became the chief fund raisers for their campus, thus requiring a provost or academic vice president to be the major determinant of the academic program of the university. This change in fund raising was the result of trustee deliberation over a lengthy period, necessitated by the constantly decreasing California state budgetary appropriations. But this change also meant a very different role for the university president to play, and this historian cannot but wonder whether Gerth's advancing age in addition to the changing character of the presidency did not hasten Gerth's overdue retirement.

Urban Whitaker: It's An "*Administrative*" History

This monumental achievement is a well-researched and well-written *administrative* history of the CSU. It is difficult to imagine that anyone could write an authoritative review of the entire volume. My response to this challenge is to comment on the one subject where I have some personal knowledge – and to leave the rest to the future reviewers that this book deserves.

But before doing that I want to say something about what I think is the single greatest value of Don Gerth's work: its challenge to contemporary and future historians of the *People's University* to complete the story for which he has laid this commendable foundation. I referred above to this book as an administrative history. That is what it is. There are at least three major stories that still need to be told: the histories of the faculties, the students, and the alumni.

Dr. Gerth did indeed cover the roles of faculty, students, and alumni as participants in the administrative history of the CSU. It is not a criticism of his excellent work to point out that one of its greatest virtues is the challenge and the opportunity it offers for the individual campuses to publish the histories of their academic programs, of the professional contributions of faculty

members, and – perhaps the most important story of all – of the achievements of their alumni.

Experiential learning. There is one major area in which Dr. Gerth has very little to say, primarily because our colleagues in various parts of the "People's University" have declined to participate fully. That area is the role of experiential learning as a legitimate part of the total education experience. At various points the book mentions "credit by examination," but it does not even include CLEP (College Level Examination Program) in the index. I think I know why. I was a Dean for a decade in the 1970s, and one of my problems came as a result of an order from the Chancellor to give credit for English to students who passed the CLEP exam at the 20th percentile. There was a system wide protest by professors of English. One very vocal opponent of the idea was John Sperling, a professor at San Jose State. And that offers an interesting scenario for a discussion of experiential learning.

In the 1970s there were quite a number of "degree mills" where credit was granted for experience, without bothering to determine whether it actually led to college level learning. John Sperling left San Jose State and started what soon became known as the University of Phoenix. Although that institution had early troubles with accreditation, it quickly became very active in a new organization created to help institutions evaluate experiential learning. That organization, CAEL (Council for Adult and Experiential Learning) is not mentioned in the Gerth book, although the CSU was one of its ten founding members. David Provost (p. 201), the CSU Dean for New Program Development and Evaluation, was an original member of the Steering Committee of CAEL and a contributor to its pioneering work in creating standards for the evaluation of experiential learning.

As Dr. Gerth notes, opposition to New Program Development and Evaluation "was strong among some of the Chancellor's staff." The CSU soon dropped out of CAEL, which has since become recognized by all of the nation's accreditation associations as the source of standards of the award of credit for experiential learning.

While it is not likely that *The People's University* will ever need experiential learning programs as a way to attract more students (one of the major reasons for its popularity among colleges with enrollment problems), it would certainly be an improvement for the CSU's students if they could look forward to having their legitimate experiential learning recognized. And it would help achieve one of "the promises to be fulfilled" cited by Dr. Gerth: shortening the baccalaureate degree.

Governor Jerry Brown (seated, center), consults with David Elliott, chair of the CSU Academic Senate (ASCSU), prior to signing AB 1091, which established collective bargaining in the CSU. Observers of the 1978 event in Los Angeles include (standing, l to r) Barbara Moore, legislative aide; Assemblyman Howard Berman, author of the bill; Bob Kully, vice chair, ASCSU; Gerald Marley, immediate past chair; Mary Jean Pew, CSU Trustee; Bart Olsen and Judd Grenier, both ASCSU executive committee members. Gerth, although not a supporter of the legislation, considers it of major historical significance.

Judson Grenier: It is a *Definitive* Encyclopedia of the CSU

It's a tough assignment to review an encyclopedia, which is exactly what this book is, from everything you wanted to know about the Vice Chancellor for Academic Affairs in 1962, the Academic Senate's support for collective bargaining in 1978, or capital outlay in the CSU in 2000, plus everything in between and behind. Donald Gerth's *The People's University* is as comprehensive, objective and deliberative an overview of the history of the CSU as could be written.

Gerth's sources for this 664-page book (published by UC's Berkeley Public Policy Press) are many and varied: traditional archival repositories, oral interviews, "focus group" discussions, popular media articles, published primary and secondary sources, and, probably most important, Gerth's own memories of a half-century of service in CSU institutions. He personally knew a majority of the people mentioned in the book. That kind of personal connection might be expected to result in either approbation or censure, but the author carefully resists partiality, even in his assessment of system leaders (except, perhaps, for his favorable evaluations of former Chancellor Glenn Dumke.)

The book is divided into five sections. The first is a comprehensive and basically chronological description of the evolution of California's normal schools into state colleges, precursors of, and reasons for, the Master Plan for Higher Education (1960), and the rather turbulent first decade of the California State College system. The fifth and last section is a reflective epilogue in which Gerth confronts the future and underlines specific areas of higher education that need further scrutiny, such as maintaining traditional CSU standards of "access, affordability, and quality," finding solutions to enrollment pressures, establishing a better mechanism for segmental coordination, achieving more collegial relationships in collective bargaining, and financial stability.

The three middle segments, the heart of the book, are arranged topically. That's understandable, for the author is a political scientist, but a narrative historian might be troubled by re-encountering characters and situations that he thought already had been evaluated and dismissed.

The first of these parts is "The Work of the CSU," which includes academic planning, graduate programs, teacher education, international education, and information technology. Gerth's emphasis is upon how coordination by the central office impacted programs on individual campuses, with considerable resistance to centralization

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CSU Budget Improves...A Little....

Governor Schwarzenegger announced the "May revise" budget on May 13, 2010, with an increase in the budget for the CSU but continued pressure on public employees to reduce pay.

The May revise seeks to continue the approximate 15% pay cut that was instituted through the three days a month furlough system during 2009-10 for most state employees under the governor's control. The 15% furlough did not apply to the CSU, but CSU unions were asked to vote on a 9.3% furlough, and most voted favorably. For 2010-11, the governor asked employees to have a 5% pay cut, a 5% increase in what employees pay CalPERS for their pensions, and a day of furlough each month in exchange for "personal leave" that would be taken before vacation time. The day of furlough each month would be one day out of twenty, or a 5% pay cut, thus totaling a 15% pay reduction, the same result as in 2009-10.

What this would mean for the CSU is unknown. During 2009-10, most employees had a 9.3% pay cut, with two Fridays a month off for many staff. For 2010-11, the CFA, other unions, and other CSU supporters mounted a substantial public lobbying campaign to prevent the UC and CSU from being cut further, and the governor responded with a May revise budget that continues to include the proposed restoration of $305 million to the CSU 2010-11 budget, as well as an additional $60 million for enrollment growth.

The $305 million would help restore part of the "one-time" reduction to the CSU budget for 2009-10 and allow the university to serve 21,000 more students. 8,000 more would be funded with the extra $60 million, at approximately $7,575 per student, the so-called "marginal cost rate." However, the marginal cost rate is approximately 25% below the university's average cost, and the cumulative effect of years of the state's funding additional students at the marginal cost rate has been to reduce the amount of state support per student substantially below the level of inflation. Some have called it a guarantee of a "race to the bottom."

To put all this in perspective, using words from Chancellor Reed's press release: "Despite this additional proposed funding, the CSU's level of state funded support remains well below that of previous years. Since 2007-08, the CSU has seen a reduction of $625 million in state support. To offset the lack of funding, the CSU implemented cost-cutting measures including enrollment cuts, student fee hikes, employee furloughs and layoffs."

Some measure of how dire the situation is for the CSU and how the CSU has changed with the decade's worth of budget cuts can be seen from the enrollment management presentation to the Board of Trustees in May 2010. The following bullets are quoted from some of the slides (with some editing for readability).

*"The CSU has taken huge funding reductions in the enacted budget....
*Current enrollment levels cannot be sustained at current (2009-10) funding level. Enrolling more students than resources allow leads to breakdowns in quality of programs and access to courses.
*[The] state budget timeline doesn't match up with realities of operating campuses; admissions, enrollment, course planning and faculty hiring all take months of lead time.
*For the first time in CSU's history, we have been required to reduce enrollment [...], thus reducing access.
*The enrollment management tools [...] for fall 2010 have been

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Three Reactions to Donald Gerth's "The People's University: A History of the California State University," Continued from the previous page

encountered locally, especially in the early years when even the concept of academic planning was new to some campuses and the middle years when the Chancellor's Office assumed the role of "gatekeeper" in approving programmatic change. Gerth also comments on the effect across the system of innovations instigated by Dumke's "New Approaches to the Curricular Process" in 1971 and the "Cornerstones" project launched in 1990. Each of these engendered both enthusiasm and resistance locally.

Next, Gerth examines "The People of the CSU," which deals with the changing makeup of the student body; the advent of affirmative action; the diverse "cultures of a campus;" the development of staffing formulas and comparison institutions in salary calculations; faculty concerns such as workload, disciplinary action and grievance procedures, and layoff based on merit (the "Ritchie" proposal); and especially, the long chain of events leading to passage of AB 1091 (Berman), which established collective bargaining in the CSU. Gerth calls the latter "the most important decision made about governance," but credits the statewide academic senate with writing into the bill provisions for a continued Senate responsibility for educational policy and curricular matters. The narrative of these developments is dramatic and very readable.

In the final segment Gerth examines "The Support of the CSU," which includes sections devoted to the Trustees, the Senate, students (and the rise of the CSPA, renamed the California State Student Association in 1979), relationships between the various chancellors and campus presidents, financing the CSU (including new emphases on fundraising and development), capital outlay and building programs, and the establishment of CSU public relations offices and personnel in both Sacramento and Washington, D.C. The author contributes examples and anecdotes from his personal encounters in describing many of these matters.

Researching and writing this veritable encyclopedia has occupied all of Gerth's time and effort since his retirement from the presidency of Sacramento State, and, reflective of the quality and care that he has devoted to the project, it is definitive.

Gerth's book is published by the Berkeley Public Policy Press, part of the Institute of Governmental Studies at UC Berkeley. It is available for about $35 from Amazon.com, or by calling the press directly at 510-642-1428.

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their entirety on the ASCSU website.)

The increasing deterioration of a commitment to shared governance is apparent at the CSU campus level as well. Having been on local school boards for almost twenty years and in CSUDH administrative positions for over twenty years, I am aware, painfully, that you cannot win friends and be popular when you are making significant budget cuts. However, these difficult times have exacerbated shared governance issues at a number of CSU campuses. There have been resolutions from CSU-ERFA, CFA, and local senates regarding program elimination and discontinuation without appropriate faculty consultation at a number of CSU campuses. These processes have all too often not included faculty appropriately, if at all. The one campus issue voted upon by ASCSU at this meeting was a response to a "no confidence" vote on the president of CSU Stanislaus. The Stanislaus faculty had voted 90%-10% in opposition to their president! The ASCSU voted unanimously to urge an investigation of this situation by the Board of Trustees and the Chancellor, and that the results of the investigation be shared with the CSUS Academic Senate as well as ASCSU. This may be the worst current example, but apparently shared governance is a very serious problem in the CSU. I am sure, given the political bifurcation and lack of dialogue in our country, that this is not unique to our system or state.

Budget Woes. If there is such a thing as good news on the fiscal front, it is that the Governor's budget included $305 million that was cut from the CSU last year. He has stated publically that he will not sign a budget that provides less that his higher education request. Another 10% student fee increase for the CSU is part of this package. Students, faculty, and administrators from UC, CSU, and the community colleges have been working very collaboratively in Sacramento. Collegiality is not dead! The related problem we face in the CSU is that our collective bargaining agreement expires on June 30, 2010. Both sides have "sunshined" their proposals. The CFA spokesman at the meeting was not optimistic that agreement could be reached easily or soon.

Legislative Intrusion. The most serious attack on the mission and autonomy of the CSU by the legislature is AB 2401. This piece of legislation would "require that CSU campuses ***deny*** admission to all freshman applicants out of the local service area (LSA), unless all CSU-eligible LSA students are granted admission." This was motivated primarily by the fact that 63,000 freshmen applied to San Diego State and only 3,000 were admitted last year. Many in the SD LSA were denied admission based upon existing entrance requirements. If this bill passes, many CSU campuses would become regional institutions (like the community colleges with local funds and boards) instead of statewide, national and international campuses similar to the UC. AS-2955-10/FGA in opposition to this dramatic change was approved by the Senate without opposition. Keep an eye on this one!

The facilitation of community college transfer credit has been an on-going issue for decades. Various inter-segmental committees, commissions, articulation groups, etc. have tried, unsuccessfully, to work through many of the complex curricular issues. There are two legislative acts (SB 1440 and AB 2301) addressing these problems. The ASCSU passed two complex resolutions (AS-2958-10/APEP/AA and AS-2959-10/APEP/FGA). I won't even attempt to summarize them; if you are interested, go on-line.

Hate crimes. In addition to these three issues, there have been several instances on CSU campuses (and others across the US and throughout the world) involving hate crimes. The Senate passed a resolution condemning hate crimes on CSU campuses and it "reaffirmed the commitment to providing a learning environment that respects all members of its community and holds central to its mission the values of inclusiveness, cultural diversity, and the welcoming of multiple perspectives."

These are, from my perspective, the most important actions taken at the last ASCSU meeting of this year. I have been asked to serve as the liaison for another year and look forward to doing so.

The ASCSU Executive Committee for 2010-11 is: Chair - Jim Postma (Chico), Vice Chair - Kevin Baaske (Los Angeles), Secretary - Diana Guerin (Fullerton), At-Large - Tom Krabacher (Sacramento) and Susan Gubernat (East Bay).

CSU-ERFA Foundation Research Grants

Grants are available to CSU-ERFA members who are pursuing scholarly research, projects, and publications. Grants of up to $2,000 are available for next year. Applications and guidelines will be available September 30, 2010.

The application due date is January 3, 2011. All interested parties are encouraged to apply.

For further information call the CSU-ERFA Office, (818) 718-7996.

In Memoriam

Chico – Grover C. Willis, Jr.

East Bay – John A. Guthrie
Jack N. Marsh

Fullerton – Levern F. Graves
Geoffrey R. King

Long Beach – Francis G. Cummins, MD
George V. Kacewicz
John M. Martin

Los Angeles – George Burstein
Stanley D. Hopper
Lamar C. Mayer
Patricia Shroyer

Northridge – Stanton M. Teal
Jeanne L. Trabold

Pomona – Robert G. Irvine

San Bernardino – Richard S. Saylor

San Diego – Edward D.S. Sullivan

San Francisco – Dorothy W. Danielson
Earl W. Jones
Patricia J. Patrick
Jerome E. Podell
Marie D. Russell
Albert Towle

San Jose – William Dusel
Morton Litwack
William J. Trimble

Long-Term Care Program Fee Increases,

From page 1

long-term care (LTC) insurance are those who are neither wealthy nor impoverished. Those who are wealthy can pay for assisted living or a nursing home on their own; those who are impoverished will have Medicaid (Medi-Cal in California) as their safety net in this area. It is the middle group for whom the protection of an estate is important enough that people purchase LTC insurance to fill in the gap."

Women tend to be much more likely to use LTC insurance and/or services. We suspect the difference is that many men decline earlier than their spouses, and their spouses care for them at home.

The following table, from the CSU-ERFA LTC page, shows that two-thirds of all men never use a nursing home compared with 48% of all women, as well as 4% of men stay more than five years in a nursing home compared with 13% of all women.

Lifetime Chance of Needing Nursing Home Care for Adults 65 Years of Age

Total Length of Stay	Men	Women
None	67%	48%
Less than 12 months	19%	21%
1 to 5 years	10%	18%
More than 5 years	4%	13%

Cameron reports that members have asked for advice about whether to drop the program entirely or stay with it, despite higher monthly premiums and promises of higher premiums in future years. He says, "I tell everyone that has to be an individual choice and depends on many factors: longevity and health in senior years of parents and grandparents; age differences between husband and wife, if any; situation with children (do they live nearby, their financial situation, etc); current health of husband and wife (or individual, if living alone); and your ability to pay the higher premiums."

A recent study from the Center for Retirement Research at Boston College highlights these factors. It asks the question of whether being healthy reduces your lifetime health care costs. The authors, Wei Sun, Anthony Web, and Natalia Zhivan, find that in fact the situation is the reverse – being healthy raises your lifetime health costs rather than lowering them. In fact, a "typical healthy couple at age 65 can expect to spend $260,000, with a 5% risk of exceeding $570,000." But "a typical unhealthy couple will spend less – only $220,000, with a 5% risk of exceeding $465,000." The difference? "Those in good health live longer, eventually become less healthy, and often need nursing home care." And their recommendations: "the healthy who delay buying Medigap or long-term care insurance could face much higher premiums later." For more information on the study, go to the Center's web site at http://crr.bc.edu and search for one of the authors listed above.

CalPERS' LTC program has several options that can reduce your costs and still provide some coverage of LTC expenses. A member can reduce the daily benefit and make up the difference with their own assets. It might make sense, considering one's own health and family history with LTC, to reduce to six years rather than a lifetime benefit, or one of the other options Cal-PERS offered most LTC members.

When considering the option of reducing coverage, each person will have his or her own willingness to assume some of the costs that LTC insurance might otherwise cover. Some people are comfortable with using some of their assets for this purpose; others are less comfortable.

Some members have communicated that they feel that they have "wasted" their money and want to get some of their premiums back by using the insurance eventually. We view the insurance purchased as just that – insurance protection for a given time period. If you don't need it, you are lucky indeed. If you do need it, that is why you are paying the premiums.

The CSU-ERFA Reporter would be glad to print any communications from members about the decision-making process they used in dealing with the current price increases. Send them to the editor at The Retiree Center, 18111 Nordhoff Street, Northridge, CA 91330-8339.

Calling CalPERS?

If you are calling CalPERS, the number is 1-888-CALPERS (225-7377).

Paul Zall, Most Prolific Retiree in the CSU?

Paul Zall, a retired professor of English and American Studies, took fully to heart the hard work and self-made-man admonitions of his idol Benjamin Franklin. He had published 15 books when he retired in 1986 after three decades at Cal State Los Angeles. When he died in December 2009 his published books totaled 36!

Although he had attained earliest recognition as a Wordsworth and Coleridge scholar, his most notable achievement was *The Autobiography of Benjamin Franklin: A Genetic Text* (1981), the first entirely accurate published edition of the Franklin masterpiece, and thus the only one to display the language shifts, additions and deletions as Franklin reinvented himself as the poor boy made good. This was followed in 1986 by *Benjamin Franklin's Autobiography: An Authoritative Text* and soon by *Franklin's Autobiography: A Model Life*.

Of course Franklin figured also in several of Paul's humorous books, *A Portrait of the Autobiographer as an Old Artificer*, *Ben Franklin Laughing* and *Benjamin Franklin's Humor*. Son Andy Zall says that the family's pain is lessened by their knowledge that Paul is now "with Ben Franklin, wherever that may be." Paul would chuckle and wonder why he hadn't thought of that.

Books on English and American literature dominated his pre-retirement publications. In 2007 he was honored in a special symposium at the Huntington Library for locating and authenticating Coleridge's previously lost translation of Goethe's *Faust*.

His love to laugh made inevitable a dominant category of American humor, which began in 1976 with *Comical Spirit of Seventy-six*, followed in 1980 with Ben *Franklin Laughing*. *Abe Lincoln Laughing* was soon published and then *Mark Twain Laughing*, *George Washington Laughing*, *Blue and Gray Laughing*, *The Wit and Wisdom of the Founding Fathers* and *Abe Lincoln's Legacy of Laughter*.

He claimed that he tried to get John Adams to laugh too but could never quite accomplish that.

CFA Report: 72nd General Assembly - Deliverology Discussions Continue

By Dave DuFault, CSU-ERFA CFA Liaison

During CFA's 72nd Assembly meeting in Los Angeles April 10-11, 2010, leaders talked about past successes and future challenges. Within that general format several guests spoke about issues important to the CFA.

Assembly Speaker John A. Perez expressed strong support for education in California. He pledged that he would work to protect higher education from additional budget cuts. He then spoke of the many problems facing the state including the historic state budget deficit, high unemployment, and past under-funding of the CSU. Speaker Perez also pledged to change the way the state legislature did business, mentioning his desire to pass the state budget by simple majority vote, to use one-time money for one-time use, and to make the government more "open." To this end he said that the "Big Five" would not be involved in budget decisions until the final stage of negotiations. Finally, Perez endorsed the UC/CSU March 4 activities (see below) saying that they had gained the attention of many legislators in Sacramento.

Vietnamese labor delegates. The next speakers were five Vietnamese education labor leaders. Recently a group of U.S. education labor leaders, including CFA President Lillian Taiz, traveled to Vietnam for discussions. The Vietnamese responded by returning the visit. They spoke enthusiastically about labor unions and education in their country.

Deliverology. Later in the day, John Seddon, a British occupational psychologist, systems analyst, and "management guru" spoke. A follower of the work of W. Edwards Deming and "systems thinking," Seddon opposed management's "command and control" style and was critical of "target based management, including the setting of "targets, benchmarks…, and assessments."

Mr. Seddon is the chief British critic of "Deliverology," a system introduced to British government by Sir Michael Barber during Tony Blair's tenure as prime minister. Seddon, who called "Deliverology" a "Mickey Mouse command and control" system, gave a 45 minute talk pointing out the many difficulties and failures of the British experiment involving setting targets and measurements for accountability, especially in the two major areas of health care and train transportation. For example, in England too many trains ran late. The government then set targets and measurements to correct this problem. After three years, according to Mr. Seddon, problems remained. The government then adjusted measurements (e.g., what constituted a late train), which then brought arrival times closer to the targets.

Although not an expert on educational reform, Seddon pointed out the obvious: that judging performance mostly on specific testing could involve teaching for the test, and therefore, not meet the overarching purposes of education.

CFA delegates were especially receptive to Seddon's remarks. As is now well known, the CSU Chancellor and Board of Trustees have already endorsed and put into action the ideas of the above mentioned Sir Michael Barber and his "command and control" understanding of change.

In early October 2009, Benjamin F. Quillian, the Executive Vice Chancellor and Chief Financial Officer of the CSU, sent a memo to all campuses about "mid-year updates to Budget Reduction Plans." In this memo he wrote that "It will be necessary to change radically business processes and service delivery systems…" so that costs "can be permanently reduced." There must be, he continued, "a fundamental transformation of the ways we meet the needs of our students, faculty and staff."

In November, Chancellor Reed reported to the Trustees about the meeting of campus provosts and presidents with Sir Michael Barber, who with his team had headed a "Deliverology" unit in the British government. The Chancellor asked that campus presidents apply Sir Michael's system to "a plan…setting a goal for closing the achievement gap and increasing graduation rates…." The plan must establish "goals, benchmarks and detail" about how the plan's objectives will be met.

The Chancellor announced the result of the above planning on January 28, 2010 in "CSU Leads National Effort to Improve Graduation Rates." He wrote that CSU will aim at increasing its graduation rate by 8% in the next six years.

On April 10, 2010, CFA issued a white paper about graduation rates in which the union stated among many other points that "graduation 'success' is only one piece of a complex equation; improving graduation rates at the expense of access, equity, and quality education is not the answer" (see www.calfac.org).

Beyond the graduation initiative, several campuses have proposed or begun other programs patterned after the general ideas advanced by Sir Michael Barber. These programs included those with names such as "rightsizing," "restructuring," and "prioritizing." Obviously "deliverology" will be the subject of ongoing controversy.

The CFA Assembly also heard about several other issues past and present.

March 4th Events. President Taiz and union staff members gave a full report of the recent March 4 activities protesting higher education budget cuts, increased tuition (fees), and falling education

(Continued on page 10)

CSU-ERFA New Members

New members joining CSU-ERFA since the March issue of *The Reporter*:

Chico – Charlotte J. Ekland
Carol L. Leedom
Judith A. Zachai

East Bay – Julia Norton
Sharon E. Riley

Fresno – David L. Lennon

Humboldt – Mark A. Larson

Long Beach – Marsha L. Thicksten

Northridge – Duane Doty

Pomona – Mary E. Mogge

Sacramento – Sheila Holcomb
Charles A. Lushbaugh

San Francisco – John D. Dierke
Catherine Siskron

Sonoma – Elaine S. Wellin

CFA Report

Continued from p. 9

quality. The March 4th events were a great success, involving many students, faculty, and other supporters of higher education in California and elsewhere. In California CFA sponsored 31 events at CSU campuses and promoted other events statewide and nationally. In addition, there was widespread media coverage, including articles in the *New York Times, USA Today, CNN.com, Washington Post, Associated Press, Los Angeles Times, San Francisco Chronicle, and Sacramento Bee.* A number of CFA leaders spoke to the media and almost all of the delegates at the 72nd Assembly participated in campus events.

Bargaining. The president reported that the fact finder's report about salary negotiations for 2008-09 will soon be made public. At that point either CFA or CSU may accept or reject the report. CFA is now drafting its "sunshine proposals" for the successor contract bargaining. The present contract ends on June 30. During the week following the CFA meeting in Los Angeles, the fact finder's report became public and recommended that CSU pay "faculty members increases in the Equity Pay Program" and service salary increases in order to "alleviate salary inequities compared to peer groups." The CSU did not accept the fact finder's report.

Sponsored Legislation. CFA continues to (co-) sponsor two bills:
--SB 330 (Yee), the CA Public Records Act: Public Colleges and Universities, which replaces SB 218, vetoed by the governor, now in the Assembly Rules Committee.
--AB 656 (Torrico), Oil and National Gas Severance Tax for Public Higher Education, now in the Senate Rules Committee.

Legislative Report: All on Hold

By Alan Wade, Chair, CSU-ERFA Legislative Committee

The electorate's dark mood. This committee's charge is to monitor and take appropriate action on legislation affecting the retirement security of CSU-ERFA members. California's current political scene requires a broader view now, as legislative activities of direct interest to retired faculty have taken a back seat to events in the larger political world. This larger world can best be characterized by the extremely dark mood of California's electorate in its current view of state government's ability to make even a dent in solving our chronic budget imbalance, now approaching $20 billion – not to mention the host of other nagging issues facing the Golden State.

Pension problems. Your committee, while it has not had a formal meeting this year, carries on a lively correspondence through email on issues of importance to CSU-ERFA. Our communications have been dominated by concern over the scapegoating of public employees as the central cause of the state's fiscal problems, and the consequential widespread efforts to cut back on public pensions. These efforts are fueled in part by widely publicized (and exaggerated) abuses of the pension system, the most noteworthy of these taking place in local jurisdictions with their own funding (outside of CalPERS).

A cure? One bill, AB 1987 (Ma), represents an effort to mitigate some of the more extreme abuses. It was drafted and is supported by public employee groups, although quietly—they run the risk of offending some of their own members. The aim of the bill is clearly to blunt some of the more strident criticisms of public pensions.

CalPERS problems. To complicate matters further, CalPERS itself has been the recipient of embarrassing media bashing over its investment policies, and especially regarding its use of highly paid placement agents, some with distinct conflicts of interest. Legislation is underway to deter some of the most egregious practices, but, as in all things legislative, it is impossible to predict the outcome.

Good news. Despite the grim climate of opinion regarding public services and how to pay for them, there is some good news. Two initiatives to restrict pensions were headed for the June ballot but have been pulled back by their sponsors, who could not afford to gather the necessary signatures without the support of Republican deep pockets. The latter, especially the gubernatorial candidates, were reluctant to underwrite initiatives hostile to labor/public employment because of the fear of backlash at the ballot. They feared that the traditionally low voter turnout in an off-year election would be upset by bringing out employee groups who might otherwise stay home. There is no doubt, though, that these pension-bashing initiatives will return.

SCORE. We are in close touch with other employee unions through SCORE (the Statewide Coalition of Retired Employees), and its lobbying firm, Aaron Read and Associates. The group consensus at the March monthly meeting could best be summed up by the mantra: "work together, stay calm, fight back."

SCORE representatives at our May 17 meeting heard the following grim prediction from our lobbyist: if either Whitman or Poizner is elected in the fall, there is no doubt that an initiative campaign will be pushed to drastically alter California's entire public pension landscape.

CSU Budget, from page 6

available to campuses for 20 to 30 years [i.e., they are not new].
**What you are seeing…is a cultural change in CSU, which has not occurred to this extent before, because more campuses are using enrollment management policies they have not been required to use [in the past].
**13 of 23 campuses are impacted for freshmen.
**12 of 23 campuses are impacted for transfers.
**Regardless of impaction status, however, the doors are open to all eligible students from the local area at 21 CSU campuses, [with] only San Luis Obispo and San Diego...impacted for each major.

Has Your Address Changed?

Please help CSU-ERFA keep our postage costs down by informing the office promptly if you move. Items mailed to CSU-ERFA members via first class are automatically forwarded to you, and if you have informed the post office, your new address is also sent to our office, but the post office charges a fee for this service. When we send items via less costly bulk mail, they are not forwarded and may never reach you. If you inform us of your address change, we can update our records and mail items to your current address. You will receive them sooner, and it saves us both time and money. Thank you for your cooperation.

Linda Zimmerman, CSU-ERFA Office Manager

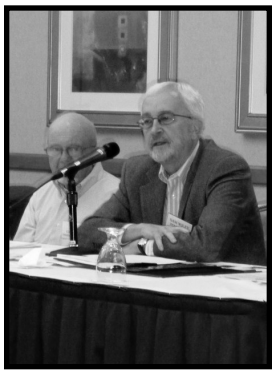
State Council Meets

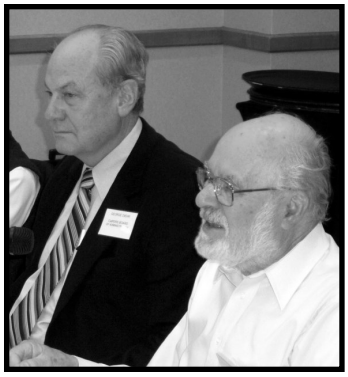
CSU-ERFA's State Council met for its Spring meeting on April 24, 2010 at the LAX Crowne-Plaza Hotel, with 43 delegates present, including founding member Sidney Albert of CSULA, who celebrated his 96th birthday the week before. Delegates heard a short talk on CalPERS from Board of Administration member and CSU San Marcos business faculty member George Diehr, who took extensive questions from the attentive audience.

Re-elected were officers H. Dieter Renning (Stanislaus) as President, Barbara Sinclair (LA) as Vice President, and Judith Stanley (East Bay) as Secretary. Harry Sharp (SLO) was elected Treasurer. Judith Hunt (Sonoma), Larry Ianni (SF), and Robert Maurer (Chico) were elected for three-year terms as at-large members of the State Council. The Treasurer's report indicated that the organization had a healthy surplus last year and was headed for another this year. See photos at right.

Above: Don Dewey, immediate past president, and Barbara Sinclair, vice president.

Below left: Sam Wiley (DH) making a point, with Judd Grenier (DH) in the background.
Below right: President Dieter Renning and guest speaker George Diehr, CalPERS board VP.





50th Anniversary of CSULA's Chemistry/Biochemistry Department

The Department of Chemistry and Biochemistry at Cal State LA celebrated the 50th anniversary of its founding in 1960, coincidentally the 50th anniversary of the California State College system, at a symposium and banquet on April 9, 2010. The founding faculty, including emeritus professor Richard T. Keys, were honored. Other emeriti at the celebration included Costello Brown, Joseph Casanova Jr., Phoebe Dea, Anthony Fratiello, Harold Goldwhite, Anthony Moye, Donald Paulson, and Stanley Pine. Professor Goldwhite gave a talk on the first 25 years of the department, and alumnus Dr. John Petersen, past president of the University of Tennessee, delivered the keynote address.

CSU Tax Sheltered Annuity Program Changes

By Pamela Chapin, Director of Compensation and Benefits, CSU Chancellor's Office

Recently, new 403(b) regulations went into effect impacting the California State University (CSU) Tax Sheltered Annuity (TSA) program.

Background information. Effective January 1, 2009, the Internal Revenue Service (IRS) implemented major changes to the 403(b) regulations that required the California State University (CSU) to restructure its Tax Sheltered Annuity (TSA) program. These changes affect not only CSU's active employee population, but also its retiree and separated employee populations as well. Major changes include requirements for employers to verify employment status and date of birth for participants for all TSA transactions and to monitor participant account data if the TSA plan offers loan and/or hardship withdrawal provisions. Prior to January 2009 participants could self-certify this information and no employer review was required.

To assist CSU in the administration of its TSA program, the CSU contracted with a "master administrator" for enrollment, monitoring of account data, and processing of loan and hardship withdrawal certificates for its active employee population. Unfortunately, CSU does not have the capability to use this feature for CSU retirees or separated employees; thus all transactions require the signature of an authorized plan administrator.

Eligible retiree transactions. In the restructured TSA plan, the following transactions are permitted for CSU retirees and separated employees:

- Distributions, including required minimum distribution (RMD) forms.
- Rollovers to an IRA.
- Contract exchanges of assets from a legacy fund sponsor to one of the five current CSU fund sponsors: Fidelity Investments, ING Life and Annuity, MetLife, TIAA-CREF, and VALIC, or to another employer's 403(b) plan.

Please note that loans and hardship withdrawals are no longer permitted for CSU retirees or separated employees due to the inability of CSU to monitor account data pursuant to the new regulations.

Contact information. The systemwide Human Resources Management office in the Chancellor's Office is the plan administrator for the TSA plan. Only designated individuals in this office are authorized to sign transaction documents on behalf of the CSU TSA plan. TSA documents should not be sent to a campus, as that will delay the review and signature process. TSA documents requiring a plan administrator's signature should be mailed with a self-addressed, stamped envelope to:

CSU Office of the Chancellor, Attention: HRM, 401 Golden Shore, 4th Floor, Long Beach, CA 90802. Please include your telephone number in case staff has a question regarding your document. Questions regarding the TSA program may be addressed to the systemwide benefits office at (562) 951-4411.

Personal & Professional

Ted Anagnoson (Los Angeles) received a Fulbright award to attend the 2010 German Study Seminar in Berlin in June. This year's topic is "The German Sozialstaat Revisited: A System in Turmoil."

Bill Blischke (Dominguez Hills) is serving on the 2010 Census Complete Count Committee for the City of Torrance. The name describes the committee's purpose. After using Census data as a student, professor, administrator and school board member for over half a century, he is helping encourage people to respond to this year's Census. One unique approach was to help arrange for the Goodyear Blimp (based in Carson) to scroll reminders as it floats over Southern California. A former student, Bob Urhausen, is the Airship Public Relations Manager. About 20 years ago, Bill supervised a special project for Bob (a Dominguez Hills Communications alum) to develop a plan to use the blimp as a communications platform during natural disasters. This plan is currently operational for all three Goodyear Blimps and was used for the Northridge earthquake in 1994, Hurricane Katrina in 2005 and other natural disasters in the US.

Barbara Peterson Sinclair (Los Angeles) was named as South Pasadena's "Senior of the Year." She is a member of the board of the Senior Citizens Foundation of South Pasadena, formerly chaired the Public Safety Commission and was recently president of the Los Angeles County Commission on Aging.

Robert H. Simmons (Los Angeles) will be teaching a course on "Wilfred Bion: A Beam of Light into the Darkness" through the newly-formed Psychohistory University in Fall 2010. He is continuing projects relating to his most recent book, *Beyond Romance: Making Love Last* (Far Hills, N.J.: New Horizon Press, 2005).

Marshelle Thobaben (Humboldt) was selected as the first recipient of Humboldt State University's inaugural Outstanding Service Award. She was selected by the Academic Senate's faculty awards committee.

Alan Wade, CSU-ERFA legislative committee chair and president of the Sacramento State campus affiliate, reports that his daughter, Lucia, a Santa Rosa police officer, seriously injured while on duty last October, is slowly recovering from multiple injuries. She was struck by a car while in foot pursuit of a robbery suspect, sustaining "mild" brain damage resulting in impaired vision and other effects. She hopes to return to patrol duty but is keeping a positive attitude while undergoing various forms of outpatient therapy. She is an unusual Smith College graduate, having chosen law enforcement as a career. Her situation was described at the Fall 2009 State Council meeting.

Still No Faculty Trustee Appointed

In spite of promises from the governor's office in March, a new faculty trustee has not been appointed as of mid-May. The impasse is between the statewide Academic Senate, which sent two names to the Governor a year ago, and the governor's office, which expressed dissatisfaction with the candidates nominated. The faculty have had no representative on the CSU Board of Trustees since June 2009.

CALIFORNIA STATE UNIVERSITY EMERITUS AND RETIRED FACULTY ASSOCIATION
The Retirement Center
18111 Nordhoff Street
Northridge, CA 91330-8339
http://www.csuerfa.org

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

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Emeritus & Retired Faculty Association