FY 07-08 IT Budget Proposal

UC Berkeley Retirement Center, VPAA & FW division
ABBA Category One: Institutional Effectiveness
ABBA Category Two: Information Technology

For more information about this proposal, contact: Shelley Glazer, #643-3212

[Include a brief overview of the proposal here. Then describe the fit between the criteria below and the proposal. For more details on the criteria, refer to the instructions on http://technology.berkeley.edu/planning/it-budget/fy-2007-08/FY-07-08-IT-Budget-Proposals-final.pdf. This should be no more than one to three pages.]

Background on the Retiree Work Opportunities program (RWO)

In 2001, the Retirement Center conducted a pilot project with the Office of the Registrar; the Registrar’s Office had a critical, time-sensitive need and no students responded to their advertisement for workers. However, 30 retirees responded when the Center advertised the same work opportunity (http://www.berkeley.edu/news/berkeleyan/2001/04/10_survz.html). This pilot project led to a series of focus groups and survey research with retirees and hiring managers to ascertain whether or not current methods of recruiting retirees for part-time, temporary work assignments were effective and whether or not there was enough need and interest on the part of both retirees and hiring managers. Outcomes substantiated both need and interest and provided conclusive evidence that the current recruitment methods, both programmatic (TAP) and technological (e-recruit) were not effective. Additionally, with the dissolution of the TAP program in 2003, hiring managers were left with no way to connect with these retirees and additionally were given few options for outside temporary agencies. Moreover, these agencies charges are expensive, especially for units that are already stretched.

Thus, the UC Berkeley Retirement Center began developing, testing, and evaluating a web-based product to bring the expertise of retirees back to the campus for part-time temporary work assignments. This work was funded by a development grant from the UC Center for Labor and Employment and followed by funding as an e-Berkeley initiative. Due to the death of its coordinator, and the campus hiring freeze, the program was dormant for a period of time, but restarted in 2005 and is now an active, growing and successful product. However, the salary savings from START and subsequent carry forward that had sustained the program will run out by the end of this fiscal year.

By way of this proposal, the Center is seeking permanent funding in the amount of $30,000/year to sustain this valuable, campus-wide program that allows hiring managers in every campus unit, to find capable, knowledgeable and UC savvy retirees who can “hit the ground running.”

1. **Alignment with IT Strategic Plan**
The RWO program supports three areas identified in the IT strategic plan.

a. **Alignment**-anticipating and adopting IT innovations and standards where beneficial to the campus as a whole. The Center anticipated that, given campus demographics, the numbers of retirements would greatly increase and that campus retirees would follow the national trend of seeking some kind of work in retirement. The Center also sought to develop an IT innovation

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1 The option of using e-recruit for this purpose was investigated collaboratively with the e-recruit team and it was decided that it was not a possibility due to both budget and functionality.
that had wide-spread access and provided a campus-wide solution that would provide a useful and effective service at no cost to departments.

b. Ease of Use-The RWO software application was field tested with both retirees and hiring managers, and has been continually evaluated and honed. Further, the Center’s technological partner (I-COHERE) has custom tailored their product (originally created as a communication Intranet for companies) according to our needs. An interested hiring manager or retiree need only get a login and password from the Center to access the site. Instructions for first-time users are available, but system navigation is not complicated. (To view the site, please contact Retirement Center program coordinator Gloria Parra at gjparra@berkeley.edu or at 3-4663.

c. Integration and Inclusion- Thinking outside the box, this program can be used as an innovative vehicle to expand the integration and inclusion of retired faculty and staff in helping UC Berkeley fulfill its teaching, research, and public service mission by further facilitating communication, collaboration and learning within and across disciplines and campus borders. Too, those who worked for a taught at Cal have innumerable resources to share with the community through paid positions or volunteer efforts.

2. Impact

This program impacts all units and departments on the Berkeley campus and in addition, brings in other Center constituents from LBNL and UC Office of the President.

This program has already had an impact and as the following statistics show, the programs use has grown dramatically in the last year. In March 2006, registered users of the RWO website included 204 Retirees, with 45 actively seeking work. There were 117 Hiring Managers/Administrators using the website. There were typically 6-8 jobs listed.

In February 2007, registered users have increased to 330 Retirees with 80 actively seeking work. There are 250 Hiring Managers/Administrators using the website. There are now typically 25-30 job postings

With almost 35% of staff and 50% of faculty retirement eligible, the need for this program is only going to increase. Further, although there is a formal structure for faculty recall that can provide a “phased retirement”, there is not a structure for staff. The RWO program is providing the option of a phased retirement for staff now that the restriction of contracting with an employee before retirement has been lifted.

3. Risk assessment

Simply stated, if funding is not received to sustain this program, it will not be able to continue.

The probability of this program's success is 100% because of the careful process and outcome research that has been integrated into its operation, and the multi-year trial that has proved its effectiveness.

4. Innovation

This program is literally cutting-edge, especially in higher education. As such, it has been selected as a finalist in the Breakthrough Award, sponsored by Civic Ventures (the most recognized civic engagement and aging think tank in the country) and MetLife.
As the ICOHERE product becomes more expansive, so too does the opportunity to offer more to its users. For example, it now has virtual conferencing, chat-room and presentation applications that do not add to our cost for the product.

With stable funding, these innovations can be capitalized on. We can expand the program as a resource for the campus administration, deans and directors seeking faculty for special projects. We can use the product as a clearinghouse for campus volunteer opportunities. Additionally, we could create a wonderful town-gown program that allowed community non-profits, city government or businesses to access our pool of skilled faculty and staff for their workforce needs. Further, in addition to the other UC campuses, the Center is part of an international association of retirement organizations in higher education; interest has already been expressed in replication.

5. Funding model

This program was developed to help the campus solve a critical work-force problem that will be occurring for at least the next 7-10 years. Thus, the requested funding would be integrated into the Center’s permanent budget.

At this time, the program is being run by Row's former program manager who retired and is now spearheading the program as a retiree, so 21% of the cost of personnel is saved since benefits are not an issue. Further, the program takes advantage of the Retirement Center's existing infrastructure and communication vehicles, which provides staffing and materials in-kind.

I-COHERE, the host site works with mostly non-profit, educational institutions, it has been generous in providing us with a reduced cost for web-hosting, technical assistance and programming changes.

It is hoped that both replication at other UC campuses and other campuses in the US and Canada, and expansion into the community will provide some budgetary offset. In any event, providing this service in the virtual environment greatly enhances its economies of scale.
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**Note:** In accordance with the University’s accounting system, positive numbers are expenses or deficits, while negative numbers are funding or surpluses.