

Retired and Emeritus Rights, Privileges and Perquisites

Annual Report to Senate for 2010-11

MEMBERS

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The Committee met on October 7, 2010. with the aim of completing a Policy Proposal for presentation to the University Senate.

Minutes of Meeting of Tenure Reduction Retirement & Emeriti Committee on Thursday October 7 at 10:00 am in Russ Tomlin's office (206 Johnson Hall).

The following members were in attendance:

Frank Stahl, Jim Mooney, George Rowe, Russ Tomlin (ex officio), Ernie Pressman (ex officio)

1. Russ convened the meeting and oversaw the election of a Chair. The Committee elected Stahl as Chair by unanimous vote.
2. The Committee completed its update of UO policies regarding the rights of emeritus faculty and retirees, which was initiated by the previous committee. The Chair will notify the Senate President of the Committee's intent to report its action to the Senate and to seek Senate ratification.
3. The Committee discussed the Facilities Policy that was passed (subject to amendment) by the Senate last Spring. (The motion as passed is no longer available at the Senate website.)

The following points of view were expressed, but, in neither issue was a Committee stand formulated:

- (1) The policy fails to recognize that the individual Faculty Members (paid or Emeritus) are the intellectual units of the University and that all reasonable steps should be taken to facilitate their intellectual contributions to the University community. The position, in the Facilities Policy as passed by the

Senate, that individual faculty should need approval of administrative units (departments, colleges, etc. or other members of a "group") to have access to the University facilities needed to put forth their thoughts is counterproductive to that aim.

(2) Inadequately defined terms rendered the Policy as written unworkable.

Frank Stahl accepted Russ's invitation to attend meeting(s) of the Committee-to-amend-the-Facilities-policy in order to present his personal perspective on these issues. [NB: In the event, Stahl was not notified of meetings, so did not attend as planned.]

4. Russ noted that the Committee was in apparent agreement that the relevant Senate Motions should be noted for each item of the Policy Library, which is under development.

Respectfully submitted,
Frank Stahl, Chair
October 11, 2010

Minutes approved by E-mail by Rowe, Mooney, Pressman, Stahl

A Policy Proposal (Policy Number: 02.01.10) was presented to the Senate and approved on December 1, 2010. I cannot verify that the version below is the exact text because I cannot find the Policy on the Senate Web Site. However, the date on this document suggests that it is final.

Retired and Emeritus Faculty: Rights, Privileges, and Perquisites

November 23, 2010

Policy Number:

02.01.10

Policy Statement:

UO Policy 02.01.10 defines and delineates the rights, privileges, and perquisites of retired and emeritus faculty at the University of Oregon.

Preamble:

The University encourages the continuing academic and intellectual engagement of colleagues who have retired or have retired and been awarded emeritus status. The UO seeks to recognize and support the experience, ability, capacity, and motivation of those retired, from full-time active service who wish to make a continuing contribution to their academic disciplines and to the University.

Emeritus Faculty Appointments:

1. The University awards emeritus status to faculty who have retired after a career of enduring excellence culminating in a period of appointment at the highest rank available of no fewer than five years. Thus, while all emeriti are retired faculty, there will be some retired faculty who do not hold emeritus status.

2. Criteria for the awarding of emeritus status.
 - a. All tenured faculty who retire with at least five years of service at the rank of professor.
 - b. All Career NTTF who retire with at least five years at the highest available rank for their appointment type.
 - c. Emeritus status is not awarded for administrative service (for example, no dean emeritus, vice provost emeritus, or director emeritus).

3. Process for the awarding of emeritus status.
 - a. At the time of retirement, the Provost or his designee will complete within six weeks the appointment process needed to establish emeritus status and convey that status to the individual.

Voting Rights

1. The UO constitution permits emeritus faculty to introduce and address motions in the Faculty Assembly.
2. Faculty members who are retired or who hold also emeritus status, including those participating in the UO tenure reduction program, shall retain departmental voting rights during

the academic terms they are on the University payroll and are serving on active duty in an instructional or research capacity in that department. A department may extend the franchise to emeriti at the local level.

3. A retired faculty member who serves on a departmental, minor faculty, or university committee, shall retain regular voting rights on that committee during his/her tenure on it.

Assignment of Working Space and Support

Working space, including offices, laboratories, and library carrels, and services are precious and limited resources that normally are allocated first to professorial faculty on active duty in teaching and research. However, it is the University's intention to provide, insofar as available, working space and services to emeritus faculty so that they may continue professional activities as members of the faculty of the University of Oregon. Planning and assignment of space and services are the responsibility of deans, department heads, and directors, and include judgment of the need for such space and services based upon likely use of such resources by the emeritus faculty person. Subsequent to the awarding of emeritus status a faculty member may apply to the department head for space and other resources needed in the continued pursuit of the faculty person's professional activities. Deans, department heads, and directors may respond affirmatively to such requests once the needs of the regular active-duty faculty have been met.

Research and Travel

Emeritus faculty may continue to make application to appropriate University offices for financial support for continuing research and for funds to support travel to professional meetings. Requests for such financial support from regular faculty on active duty, and especially from younger members of the professoriate, will be given first priority in allocating such resources.

Emeritus faculty may also submit proposals through the University for grants from outside agencies to support their scholarly activities, and may serve as principal investigators on such grants. The assignment of working space and support for such grant-supported research must follow the principles set out in the previous section.

Utilization of Retirees' Services

Retired and emeritus faculty who are not on appointment are not obligated to render measurable and identifiable services to the University; however, any retired or emeritus faculty member may volunteer to perform tasks or undertake responsibilities for the University consistent with his/her expertise and experience.

University Catalog Listing

Emeritus faculty are listed in the University Bulletin in the section for the appropriate department. This listing will continue for life.

Additional Privileges and Prerequisites

1. To the extent possible, the UO will afford both retired and emeriti faculty continued access to academic support, consistent with access policies and practices for regular faculty.
2. Access is appropriately constrained where resources are needed first for employed faculty and UO programs, and only for those faculty who sustain active and visible academic activities.
3. The University shall grant to retired and emeritus faculty (1) free parking whenever the faculty member is not employed by the University; and (2) free use of Student Recreation Facilities. In addition the Provost or designee will update annually a list of other resources for retired and emeritus faculty, which list of resources will be published on the Academic Affairs website as well as on the Human Resources website.
4. The Provost or designee will communicate annually to all emeriti a message of welcome and inclusion into the UO academic life.

As of June 18, 2011, The Policy Proposal above has not been adopted by the UO Administration. Informal communications indicate that the legality of granting parking and recreation rights to retired faculty is under study by the University General Counsel. In the meanwhile, concern has been expressed by some faculty members that the policy of demanding five years in service at the highest rank is inappropriate for some disciplines. The 2011-2112 Committee has been charged with confronting these issues.

Respectfully submitted
Frank Stahl
June 18, 2011.