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January 19, 2020

University of California
Academic Council Chair

Dear Chair Kum-Kum Bhavnani,

As Chair of the Joint Benefits Committee (JBC), a select committee of CUCEA and CUCRA that analyzes, reviews and advocates on topics important to emeriti and retirees, I am attaching the JBC's *Position Statement on Conferral of Emeritus/a Status*.

The JBC respectfully requests that the Academic Senate and its committees review the conferral of Emeritus/a status again and we hope that the Academic Council will recommend to the Regents a return to the *status quo ante* before May 2018 wherein all retiring Academic Senate faculty (in good standing) received automatic Emeritus/a status.

We also would appreciate your forwarding this Position Statement as quickly as possible to the Chairs of P&T, UCAP and UCFW.

Thank you,

A handwritten signature in blue ink that reads 'Roger Anderson'.

Roger Anderson (UCSC), Chair
Joint Benefits Committee

Cc: Vice Chair Mary Gauvain
Michael Brown, Provost and Executive Vice President For Academic Affairs
Hilary Baxter, Executive Director of the Academic Senate

Attach.

CUCEA/CUCRA Joint Benefit Committee (JBC)
Position Statement on Conferral of Emeritus/a Status
January 16, 2020

JBC Recommendation:

The JBC respectfully requests that the Academic Senate and its committees review the conferral of Emeritus/a status again and we hope that the Academic Council will recommend to the Regents a return to the *status quo ante* before May 2018 wherein all retiring Academic Senate faculty (in good standing) received automatic Emeritus/a status.

Why is the JBC interested in this issue:

The Joint Benefits Committee promotes the interests of Emeriti/ae and retirees of the University of California. The Committee membership consists of the Chairs and Vice Chairs of CUCRA (Council of University of California Retiree Associations) and CUCEA (Council of University of California Emeriti Associations), plus two members appointed by CUCRA and two members appointed by CUCEA plus 3 members determined by the 4 appointed members. The Chair can be a member of either CUCRA or CUCEA and is appointed by the committee members.

Much of the work of the JBC concerns retirement benefits: UCRS, Health care, efficient operation of RASC, and other benefits offered to productive and committed retirees of UC. For retired faculty one of the most important benefits is Emeriti/ae status^a. Emeriti status recognizes the same accomplishments that earned promotion to tenured titles such as Associate Professor or Professor. However, we fully recognize that similar accomplishments are required for promotion in other Professor series such as Professor In-Residence, Professor of Clinical X or other valued faculty such as Security-of-Employment Lecturers. In the case of In-Residence and Clinical X professors, they do much of the teaching and research in UC's Medical Centers, almost always without state-supported salary. These alternative series faculty are members of the Academic Senate and many have served in leadership roles on campus committees and the Academic Council. They continue this commitment to UC as Emeriti, and they have served as Vice Chair and Chair of CUCEA.

The JBC believes that all Academic Senate faculty in alternative series where promotion is merit based should be automatically offered Emeritus/a Status at retirement.

Some history and arguments for the JBC position:

1. During the academic year 2017-18 the UC Regents engaged in combining /simplifying their Standing Orders/Policies. SO 103.5 and Policy 1203^b concerned emeritus/a status for retiring faculty, staff and Regents who completed their terms. This particular issue seems to have been considered quickly and policy changes were approved at the Regents May 2018 meeting (Item G2^c). One change was to confer Emeritus/a status only to retiring Professor and Associate Professor faculty ('regular' or 'ladder-rank' faculty) rather than automatic conferral of the Emeritus/a title to all retiring Academic Senate faculty (*status quo ante*).

2. There was concern about inconsistent rules for awarding Emeritus/a status, although one current recollection is that there may have been inconsistencies in awarding Emeritus/a status to non-academic retirees, but that awarding Emeritus/a status to retiring Academic Senate faculty was practiced uniformly over the campuses^d.
3. The Regents Item G2 May 2018 accepted changes submitted by the President in consultation with the Academic Senate and UC Provost.
4. This change removed an automatic honorific title ('Emeritus/a') to some retiring Academic Senate members (health sciences In-Residence, Clinical X plus some astronomers, agronomists, Lecturers with Security of Employment, maybe a few others) with no clear benefit. The granting of the Emeritus/a title has essentially no financial cost.
5. The changed Regents Policy allows the Senate to make recommendations to the President for granting of Emeritus/a status to faculty. However, such policies are to be adopted on each campus, with possible *greater* variability in awarding Emeritus/a status to retiring non-ladder rank faculty than the *status quo ante* in addition to extra costs to administer review of retiring faculty to receive Emeritus/a status.
6. The Draft APM 120 covers Emeritus/a issues and proposed changes that will bring it into compliance with the current Regents Policy 1203 and has been distributed for systemwide review. In addition to suggesting possible edits to the document, the JBC requests that CUCEA and CUCRA ask the Academic Senate to recommend that Regents Policy 1203 also be changed to reflect the *status quo ante* before May 2018, returning the automatic granting of Emeritus/a status to retiring Academic Senate faculty, rather than only to retiring ladder-rank faculty.
7. There may not have been a complete understanding of this change when the Academic Council unanimously approved it in October 2017. Council minutes of 2016-8 do not reflect any discussion of this issue before October 2017, the issue was not on the Council's agenda in advance of that meeting, and the proposed changes were distributed the evening before the meeting. The minutes erroneously reflected that automatic conferral of Emeritus/a status only to ladder-rank faculty *already* was in place at the time of this meeting, when in fact such status at that time was granted to *all* Academic Senate faculty retirees.
8. JBC believes that the Academic Senate and its committees should review this issue again with the expectations that the Academic Council will recommend to the Regents a return to the *status quo ante* before May 2018 wherein all retiring Academic Senate faculty (in good standing) received automatic Emeritus/a status.
9. JBC will also review the proposed changes in APM 120^e and make suggestions for changes in addition to the issue outlined in paragraphs 1-8 above.

Respectfully submitted by the **Joint Benefits Committee**:

Adrian Harris (UCLA) Appointed by CUCRA
Randy Scott (UCOP) Appointed by CUCRA
Joel Dimsdale (UCSD) Appointed by CUCEA
Dan Mitchell (UCLA) Appointed by CUCEA
Louise Taylor (UCB) Selected by JBC

Larry Pitts (UCSF/UCOP) Selected by JBC
Roger Anderson (UCSC) Chair Selected by JBC
Marianne Schnaubelt (UCI) CUCRA Chair
Joe Lewis (UCOP) CUCRA Chair-Elect
Henry Powell (UCSD) CUCEA Chair-Elect
Caroline Kane (UCB) CUCEA Chair

Footnotes

a. Here is the UC Berkeley statement of Emeritus/a privileges and benefits. Other campuses have similar or identical benefits

<https://ofew.berkeley.edu/welfare/retirement/privileges-and-benefits-conferred-upon-emeriti>

b. Regents Policy 1203 adopted May 2018 – C.1 shows automatic Emeritus/a status for Prof/Assoc Prof with C.2 allowing the President or designee to bestow Emeritus/a status to other Academic Senate faculty retirees after ‘recommendation of the Senate’.

<https://regents.universityofcalifornia.edu/governance/policies/1203.html>

c. Regents Governance Committee audio May 2018 – Item G2 approved with a short discussion about the value of Emeritus/a status for Regents. Faculty only mentioned by noting the change in automatic conferral of Emeritus/a status only to Prof and Assoc Prof, with the Senate having authority to make recommendations to the President re: Emeritus/a status for other academic personnel.

<https://archive.org/details/1Academic/1-governance.wma>

d. There may have been a campus survey on this point, but the results can’t be located now.

e. Systemwide review of proposed APM 120 revisions

https://senate.ucmerced.edu/sites/senate.ucmerced.edu/files/page/documents/website_2019-10-30_apm-120_revisions_clean_final.pdf

Additional comments:

Regents Standing Order 103 prior to May 2018 (subsumed into Regents Policy 1203 with changes). “The title Professor Emeritus shall be conferred, upon retirement, on every Professor and Associate Professor. The title suffix Emeritus for positions held at the time of retirement shall be conferred, upon retirement, on every member of the Academic Senate. With the approval of the President, Emeritus status shall be conferred, upon retirement, on every academic appointee who is not a member of the Academic Senate but who meets specific criteria established by the President.”

Academic Council Minutes October 2017 – Item VI. Emeritus/a Policy – Minutes inaccurately state that ‘under current policy, emeritus status is conferred on every professor and associate professor upon retirement. It may also be conferred on other members of the Academic Senate with the approval of the Senate . . .’ <https://senate.universityofcalifornia.edu/files/committees/council/council-10-25-17-minutes.pdf>