Date: June 22, 2016

To: Pam Hutchins, Director for Human Resources

From: Sona K. Andrews, Provost and VP for Academic Affairs

Subject: Emeritus Rank for Non-Tenure Track Faculty

Attached please find the final report presented on June 6, 2016 to the Faculty Senate by a Task Force on Emeritus Rank for Non-Tenure Track Faculty. The report clarifies the Senate’s desire to ensure that non-tenure track faculty are eligible for emeritus status. I concur with their assessment and recommendations.

We ask that the Office of Human Resources change its website and eliminate the word “tenured” from its description of faculty eligible for emeritus status. All faculty who are awarded emeritus status, regardless of appointment type, should receive the same benefits and privileges.

The Senate will need to take formal action for any modifications to the Policies and Procedures for the Evaluation of Faculty for Tenure, Promotion, and Merit Increases document. The Office of Academic Affairs will notify units that they need approved guidelines in place regarding consideration for promotion to emeritus status.

cc: Faculty Senate
Academic Leadership Team
American Association of University Professors (AAUP)
Task Force Emeritus Rank for Non-Tenure Track Faculty
Shelly Chabon, Vice Provost, Academic Personnel and Leadership Development
Report of the Task Force on Emeritus Rank for Non-Tenure Track Faculty

Task Force Members

Clifford Allen, School of Business Administration  
Richard Campbell, Maseeh College of Engineering and Computer Science  
Nancy Eichsteadt, Graduate School of Education  
Robert Gould, College of Liberal Arts & Studies  
Susan Lindsay, Intensive English Language Program (Chair)  
Stephen Percy, College or Urban and Public Affairs  
Gary Smith, School of Social Work

Task Force Charge:

1. Examine the current use of emeritus ranks for NTTF
2. Create a clear procedure that can be consistently applied to all NTTF, and explore the benefits that can be conferred sustainably to an expanded number of emeriti NTTF.

Background Exploration on Emeritus Status for NTTF Faculty

Specification of Emeritus Rank

The Policies and Procedures for the Evaluation of Faculty for Tenure, Promotion, and Merit Increases (effective July 1, 2014) includes the following language regarding the Emeritus Rank (section III, page 13):

_The Emeritus rank may be awarded upon retirement in recognition of outstanding performance._

Inconsistency in Campus Information on Emeritus Status

The Task Force explored for policies (other than the provision in the Policies and Procedures document identified above) related to emeritus status. We found that Emeritus faculty status is described on at least two places on the PSU website:

Human Resources: The PSU Office of Human Resources website contains the following information regarding Emeritus Status:

_Tenured faculty may apply for and receive emeriti status. By taking the emeritus award letter to the ID window in Neuberger Hall along with your picture identification, you will receive a lifetime Emeritus card. This currently entitles you to library privileges, free admission to all PSU athletic events, access to PSU fitness facilities, and non-transferrable staff fee privileges. An Emeritus parking permit will also be issued free of charge upon request and office space may be available based upon departmental_
discretion and space availability. Changes to these offerings are subject to the discretion of the University.¹

Office of Academic Affairs: The Office of Academic Affairs website includes an “ABC’s of Portland State University” page that provides the following information on Emeritus:

This rank may be awarded faculty upon retirement. The award process is initiated by the department/area during the regular promotion and tenure process. Reference: PROMOTION AND TENURE GUIDELINES. Special benefits are accorded emeriti faculty upon presentation of an Emeritus Identification Card. To obtain an Emeritus Card, present your emeritus award letter along with the emeriti memo from Human Resources to the I.D. Card window in the Neuberger Hall Lobby during posted hours. A photo Emeritus Identification Card will be issued to you; this is a permanent card and will have no expiration date. For a listing of benefits offered to Portland State emeriti faculty please see READY TO RETIRE. See also RETIREMENT ASSOCIATION OF PORTLAND STATE.²

These provisions on the PSU website are not consistent. The Task Force was unable to identify any other relevant policy document related to emeritus status by faculty employment category.

Data on Past Award of Emeritus Status

The Task Force has found that according to records maintained by the Office of Human Resources, that since 2005, 148 faculty members have been granted emeritus status; 28 of these faculty members had the rank of Non-Tenure Track Faculty.

Benefits Associated with Emeritus Status

The Task Force explored the benefits that are accorded to faculty with emeritus status. According to the Office of Human Resources, retired Emeritus Faculty receive the following benefits:

1. Library Privileges
2. Access to the Campus Recreation Center
3. Email account
4. Free admission to all PSU athletic events
5. Parking
6. Non-transferable Staff Fee Privileges

¹ See PSU Human Resources website, Employee’s Corner, Retired Employees section: http://www.pdx.edu/hr/ready-to-retire-or-retired-employees.

The Task Force conducted research to ascertain costs associated with provision of benefits to retired faculty with Emeritus Rank. Research included outreach to multiple campus units. We learned the following about the fiscal implications of providing benefits to retired faculty with emeritus rank.

1. **Library Privileges:** From Molly in Library: “I ran the report earlier today and found that we have 482 faculty members with emeritus status. Out of that group only 85 people have books checked out. I talked to my colleague, Barbara Giackin, who oversees our resource services, and she said that we do not have a way to measure who is using our electronic resources. But my guess is that if there are only 85 people checking out books, there aren’t many more than that who would be using our databases and ebooks. So I would say the impact is minimal. Plus, we enjoy having our emeritus faculty in the library and staying connected to the University.”

2. **Campus Recreation Center:** Conversations with Campus Recreation Center identified that this unit allows emeritus faculty to enroll at the Center at the faculty rate. Less than 25 emeritus faculty currently have Campus Recreation Center memberships.

3. **Campus Email Accounts:** From Jerrod Thomas at OIT. He reports they were able to find 494 current emeritus account holders and that there are two main components to OIT’s support of these accounts, systems integration and end-user support. As far as support goes, since these accounts last forever vs. expiring at the end of employment the number of requests is naturally higher, he states “the more emeritus there are, the more the ongoing support burden.” These accounts also maintain access to nearly all services we provide support for so there is no reduction/simplification there. His rough estimate for supporting the current emeritus faculty is 10%-20% of one FTE of an Information Technology Consultant 2 classified position. His reported quick calculation puts that between $7k and $15k per year salary cost (including OPE).

It is important to note that these emeritus email accounts apparently never expire...even if the retired faculty member is no longer living. The committee raised this question to OIT and Jerrod stated there wasn’t any way for him to know if the member was no longer living. Therefore the number of actual active emeritus users may be much less than the reported amount.

4. **Athletic Events:** Campus box office reports that it typically allows emeritus faculty to purchase tickets to athletic events at the current faculty rate. On occasion, when asked to provide free admission based upon emeritus status, free access is provided after they check with the event sponsoring department (ex: PSU Football). They report this occurs only once or twice per year.

5. **Parking Office:** Ian Stude of PSU Transportation and Parking provided the Task Force with the following information in response to our request for data and an active survey: “Attached is some of our preliminary data from our counts of Emeriti Permits on campus. We are continuing to count and will provide more analysis by end of the month. From this data, it would appear that utilization is approximately 10-12 permits per day. At our daily rate of parking ($12) this amount of usage over the course of the academic year would amount to approximately $30,000 in value. If each use were billed to an internal PSU department, this would come to approximately $20,000 in expense (or revenue to TAPS).” (See attachment 1 for more detailed information from the parking survey.)
6. **Staff Privilege:** It is possible that NTT Emeritus Faculty may be able to enroll in credit bearing courses at the reduced rates available to staff. There is little evidence that this is happening much on campus. For example, according to a data survey by the Office of Human Resources, in all of AY 2014-15, only two Emeritus Faculty used the staff fee privilege.

**FINDING**

Find no existing university policy to the contrary, the Task Force believes that the provision for award of emeritus status as outlined in the *Policies and Procedures for the Evaluation of Faculty for Tenure, Promotion, and Merit Increases* applies to all faculty including Non-Tenure track faculty.

**RECOMMENDATIONS**

The Task Force on Emeritus Rank for Non-Tenure Track Faculty offers the following recommendations:

1. Because of ongoing confusion on the matter, the *Policies and Procedures for the Evaluation of Faculty for Tenure, Promotion, and Merit Increases* should clarify that NTT faculty are eligible for consideration for emeritus status upon retirement.

2. Emeritus rank may be awarded upon retirement in recognition of outstanding performance. Continued relationships and connections to PSU after retirement is not relevant to award of emeritus rank, consistent with the Policies and Procedures for the Evaluation of Faculty for Tenure, Promotion, and Merit Increases document.

3. The University should ensure that units within the University have approved guidelines in place regarding consideration for promotion to emeritus status. This should include: (1) criteria for assessing outstanding performance and (2) identification of unit decision making bodies for emeritus rank consideration, and (3) other appropriate process elements for a fair and consistent review process.

4. The Office of Human Resources should immediately change its website to eliminate the word "tenured" from its description of benefits available to faculty who achieve emeritus status. We found this reference not supported by any policy and potentially harmful to faculty considering retirement who might believe themselves not eligible to apply for emeritus consideration.

5. All faculty who are awarded emeritus status, regardless of appointment type, should receive the same benefits and privileges.