

## **Berkeley Retirement Incentive Program**

This memo supercedes the Council of Deans memo of 4 November.

### **Appointments as Professor of the Graduate School (PGS)**

Retiring faculty who are fully engaged in research and who continue to contribute with distinction to the graduate program may be nominated for appointment.

#### Eligibility and Duties

- Faculty retiring in academic year 2003-04 may be nominated for an initial appointment of up to three years. Otherwise, appointments are for one year, renewable.
- Nominating deans and chairs should identify appropriate duties for each individual nominated. These include dissertation supervision, participation on orals committee, regular participation in graduate seminars, performance of administrative service.
- Continuation of the privileges of the title requires residence for the equivalent of one semester during any academic year. The title and any privileges will be discontinued if the residency requirement is not met.

#### Privileges

- Access to departmental support services extended to regular faculty.
- Identification in the campus catalogue and elsewhere as “Professor of the Graduate School” instead of “emeritus/a.”
- Authority to seek outside grants and serve as PI are the same for PGS as for regular faculty
- In exceptional cases the Chancellor, upon the recommendation of the Dean, may allow a retiring faculty member holding an endowed chair to retain all or part of the income of the chair for the length of the initial PGS appointment or the end of the term of the chair, whichever comes first. Chair income may only be used for research expenses and the support of graduate students. It may not be used to provide summer compensation or any other form of income supplementation.
- PGS are considered to be “recalled” and have the departmental voting privileges of Emeriti/ae as established under Senate By-Law 55.D (3)

#### Criteria for PGS Appointment

Nominations for PGS appointment must be made by the department chair, accompanied by an affirmative departmental vote. The chair’s nomination letter should describe the departmental value of the appointment and the nominee’s expected duties and activities.

The nominations are reviewed by the relevant Dean and the Academic Senate's Committee on Budget and Interdepartmental Relations. Appointments are approved by the Vice Provost for Academic Affairs and Faculty Welfare.

### **Recall Teaching Agreements.**

Arrangements to recall retiring faculty for teaching purposes may be made before the retirement date with faculty aged 60 and above. Multi-year agreements will not be considered binding, although an intention to recall for up to three years may be expressed. Recall appointments must be made annually, and must be based on programmatic need, budgetary capacity, and continued successful performance of duties.

The agreement must specify the course(s) to be taught and the rate of compensation. Compensation for recall teaching assignments is by agreement. In establishing the compensation for recall teaching, chairs and deans should be guided by the nature of the teaching assignment, the alternative cost of providing instruction, and the available financial resources.

Recall assignments may not commence until 90 days after retirement. However, if there is a compelling need for an earlier recall, the effective date of the recall must be at least 30 days after retirement or upon receipt of the first retirement check—whichever is later.

### **Financial Incentive.**

For each faculty member who retires in 2003-2004, deans will be credited with \$15,000 to be used in a manner agreed to with the retiree. Retirees need not be appointed as PGS to be eligible for this support, but they must be in residence and may not take other academic employment. The options include:

- A research grant, primarily to hire research assistants and otherwise support graduate students. PGS who continue to hold endowed chairs may use these funds only to provide fellowship support to graduate students.
- Financial support of recall teaching appointments.
- Renovation of offices or other physical facilities appropriate to the transition from regular to emeritus/a or PGS status.
- A combination of the above.

Department chairs may discuss these arrangements, but approval for the use of funds will be made by the relevant dean.

### **Space**

All issues of office and laboratory space must be arranged by the dean and/or chair. In doing so, the campus guidelines for emeriti/ae offices (available at: <http://smcp.vcbf.berkeley.edu/policies/emeriti.htm> ) should be followed.