

ACADEMIC PERSONNEL POLICIES & PROGRAMS

Pre-retiree considerations

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Vice Provost – Academic Affairs

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Today's topics

- **Some basic rules for recall**
- **Compensated activities in retirement**
 - Compensation limits, insurance
 - Reasons for recall
 - Many ways to serve the campus
- **Non-Senate academics**
- **Remaining engaged through other activities**



For recall, timing is *critical*

- Recall discussions cannot occur until an actual break in service occurs: after you receive your first UCRP monthly retirement payment, or 30 days (“preferably 90 days”) after you’ve ended UC employment – whichever is later – if you haven’t reached normal retirement age:
 - Joined UCRP before July 1, 2013: age 60
 - Joined UCRP on or after July 1, 2013: age 65
- Prior discussion is a violation of policy and IRS rules!
- If the appointee is 60 or over, with at least five years of service credit, recall discussions can occur at any time.



Compensation while on recall

- Recall appointment cannot exceed 43% of final employment salary *in any given month*.
 - IRS rules.
- Agreement may be up to three years, with annual renewal afterwards.
- Recalls are requested at the discretion of the department, dean, or other administrator, and are approved by the VP-AA.
- Some recalls are without salary, but a recall appointment is still needed for insurance purposes.

Reasons for recall

- **Teaching**
- **Research**
- **Service**



Teaching

- Recall for teaching - academic year or summer sessions.
- Education Abroad Program
- Can include certain clinical teaching; i.e., Medicine or Veterinary Medicine.
- Rate of pay
 - is based on a negotiated percentage of the appointee's final employed salary (must be 43% or less).
 - may vary according to what the department, other unit or grant can afford.

Research

- **Space for research**
 - depends on the availability and needs within the department or ORU.
 - Must be negotiated with the Chair/Director.
- **“Research Professor”**
 - The working title of "Research Professor" may be used on grant applications by Emeriti Professors, who wish to continue to apply for research grants, provided they are on an active recall for teaching and extramurally funded research, or for extramurally funded research only.
 - It may be strategically helpful for the granting agency to see this title, rather than “Emeritus”.

Research funds

- Remember that all funds in your UC Davis accounts actually belong to the University and are under the Dean's control, and may be used for university purposes only.
- An MOU regarding account balances should be developed with your Dean in consultation with the Department Chair before retirement

Research funds

- Management of funds on current (or new) extramural grants is generally the PI's purview through the term of the grant
- Disposition and management of other accounts (e.g. gifts, Academic Enrichment Fund accounts, etc.) should be established via an MOU signed by your department chair and dean. Such MOUs must have a fixed term (typically no more than three years), and require renewal to extend longer.
- See: <https://academicaffairs.ucdavis.edu/academic-enrichment-fund-aef-accounts>

Administrative service roles

- **Regular administrative roles, e.g.**
 - Department Chair
 - Department Vice-Chair
 - Graduate Group Chair
 - Associate Dean
- **Special assignments for the department, college, or central administration, e.g.**
 - Faculty Assistant to the ____
 - Investigations for Academic Affairs or Office of Research

In service of shared governance

- **Emeriti remain valuable members of the Academic Senate**
 - They should be informed of faculty meetings.
 - Departmental voting rights are determined by departmental voting by-laws.
- **Emeritus Committee – considers all emeriti issues.**
- **Emeriti are often asked to serve on other standing and special committees.**
- **Contact Edwin Arevalo for information on these opportunities (754-7468, emarevalo@ucdavis.edu).**



Non-Senate Academics

- **Non-Senate academic titles can request emeritus status, if they:**
 - **Have served at least 10 years.**
 - **Have reached the highest rank of that series.**
 - **Have evidence of noteworthy and meritorious contributions to the educational mission.**

APM 120 (recently revised) outlines the review process.

Chancellor has approval authority.

Yet more ways to stay engaged

- **Serving on dissertation committees**
- **Advising, counseling students**
- **Emeriti Association activities**
- **Events through the Retiree Center**

Emeriti Association


- **Membership-based organization**
 - Dues: \$25/Year, \$200 Lifetime
- **Advocates for and supports emeriti**
 - Lead emeriti advocacy efforts for benefits
 - Brain Food Talks- Series of talks/lectures led by recently retired faculty about their research
 - Board positions available
 - Manages Emeriti video records project
 - Help keep Emeriti & Retiree Parking at UC Davis

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ASK A QUESTION

ATTEND A FREE INFO SESSION

Faculty can both take *and* teach classes through this Institute

****Emeriti Association members receive discount****

Benefits and Privileges of Emeriti/ae

- Right to use the Emeritus/Emerita title
- Right to continued departmental and Senate membership
 - Service on departmental and Senate committees
 - Service on student committees
 - Ability to mentor students
 - Potential (not right) for recall or volunteer for teaching, research, and service
 - Voting rights vary by department

Benefits and Privileges of Emeriti/ae

- Right to continue to use your UC Davis email address, email services, and UC Davis directory listings
- Right to continued library privileges, access to software downloads, and e-journals
- Eligibility to serve as PI on grants
- There are currently no plans to discontinue university support to help in defraying the cost of medical and dental insurance, and access information/benefits through the Health Care Facilitator Program



Benefits and Privileges of Emeriti/ae

- Access to UC Davis' Foreign Travel Accident and Assistance Program
- Access to Retiree (RT) campus parking permits (equivalent to "A" on main campus and "B" on Health Sciences campus, with reciprocity) *unless recalled*
- Access to advice from University-sponsored Fidelity investment and retirement planners
- Access to campus venues at same costs as active employees
- Access to resources to assist in navigating retirement: <https://retireecenter.ucdavis.edu/resources-retirement-planning>

QUESTIONS?

- See Fact Sheet.
- See the Academic Affairs website under “Retirements & Recalls”: <https://academicaffairs.ucdavis.edu/retirements-and-recalls>
- See UC Davis Emeriti Association website: <https://emeritiassociation.ucdavis.edu/privileges-and-benefits>
- Use your resources (Benefits) in making informed decisions.
- Please do share feedback on this series by responding to the survey sent by the Retiree Center.