

**From:** Steinke, Gary W [BOARD]  
**Sent:** Tuesday, February 27, 2007 12:25 PM  
**To:** Arbisser, Amir; Becker, Mary Ellen; Connolly, Jenny; Downer, Robert; Fry, Bobbi; Harkin, Ruth; Krause, Lisa; Michael Gartner; Smith, Judy; Teresa Wahlert; Vasquez, Rose  
**Cc:** Geoffroy, Gregory L [PRES]; 'Fethke, Gary C'; Ben Allen; Jeananne Schild; 'Jeanne Glidden Prickett'; Regents Staff [BOARD]  
**Subject:** Emeritus Report

Good Afternoon,

Attached please find the emeritus report requested by the Board of Regents which was researched and compiled by Dr. Gonzalez. The attachment contains:

- \* An Executive Summary
- \* Attachment A - Board Policy sections
- \* Attachment B - Institutional detail about their policies

Please let me know if you have any questions or would like any follow-up to the prepared document.

Gary

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**REPORT TO THE BOARD OF REGENTS ON EMERITUS POLICIES**  
**EXECUTIVE SUMMARY**  
**February 16, 2007**

- ☑ Emeritus is an honorary status which is awarded typically after retirement in recognition of service to a university. It is a commonly used designation in higher education although the policies to confer emeritus status may differ, e.g., eligibility, approving entity.
- ☑ All of the Regent universities have policies relating to granting emeritus status upon retirement. UNI'S policy also permits conferring emeritus status to qualifying individuals who resign from the University and those with part-time status.
- ☑ The following have emeritus status at the universities:
  - ◇ At the University of Iowa, there are 611 faculty and 29 staff members.
  - ◇ At Iowa State University, there are 668 faculty members and 4 staff members.
  - ◇ At the University of Northern Iowa, there are 287 faculty and 28 staff members.
- ☑ Automatic conferral of emeritus status is given by the University of Iowa and Iowa State University.
  - ◇ At SUI, tenured or salaried clinical track (regular) faculty, administrative officers, research scientists, research engineers, and library professional staff who retire after 10 years or more of continuous service are eligible.
  - ◇ At ISU, tenured faculty members who have attained the rank of professor and who retire after 10 years or more of continuous service are eligible
- ☑ At the University of Northern Iowa, an application for emeritus status must be processed through normal administrative channels; the Faculty Senate also acts on all requests pertaining to faculty members.
- ☑ Permissive conferral of emeritus status is given by two of the universities.
  - ◇ At SUI, emeritus status may be conferred by the Executive Vice President and Provost to tenured or salaried clinical track (regular) faculty and administrative officers with less than 10 years of service; and by the Senior Vice President for Finance and Operations in consultation with the Executive Vice President and Provost to otherwise eligible staff with less than 10 years of service.
  - ◇ At ISU, retired faculty members who do not meet the criteria may be nominated by the faculty of the individual's department; the nomination must be approved by the college and the Academic Council. Persons retiring from administrative duties may be conferred emeritus status at the discretion of the president. Persons retiring from administrative duties may also be conferred emeritus status at the discretion of the president.
- ☑ At ISU and SUI, the policy states that the president, upon retirement, may be given the title "president emeritus" by the Board of Regents. At UNI, the policy does not specifically address conferral of emeritus status for the president; however, as a faculty member, the president is conferred emeritus status if he/she meets the criteria for eligibility.
- ☑ At UNI, the policy permits certain privileges, such as parking and fitness center use, to be extended to spouses and domestic partners.
- ☑ There are no university-wide policies for making space and resource request allocations. Decisions appear to be made by the deans and are based on space and resource availability; there is no reference to benefit to the university regarding these allocations.
- ☑ There is no Board of Regents policy which addresses conferring emeritus status at the universities. The following Board policies contain references to emeritus status.
  - ◇ Board policy §3.03 permits conferral of emeritus status to Board Office staff upon the recommendation of the Executive Director and the approval of the Board of Regents. Emeritus staff members receive access to the Iowa State web mail server. There are two retired Board Office staff members who have emeritus status.
  - ◇ Board policy §4.09 allows awarding of professional development assignments to retired and emeritus faculty.
  - ◇ Board policy §9.01G-4g states that "each university should consider development of policies regarding office space for part-time employees, including adjunct faculty, graduate students, and emeritus faculty.

## ATTACHMENT A

Board Policy Manual §4.09 states:

Requests for professional development assignments for personnel covered by §4.07, including retired and emeritus faculty and staff, may be granted by the institutional heads and reported in the Register of Personnel Changes, except that professional development assignments shall be submitted to the Board by the institutional heads for approval.

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Board Policy Manual §3.03 states:

The Executive Director may recommend to the Board designation of emeritus status for members of the Board Office staff who retire after substantial service to the Board of Regents and the Board Office. Emeritus status will not confer any economic benefit or right upon a retired staff member and may include continued access to the Board Office e-mail and other benefits as determined by the Executive Director and the Board.

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Board Policy Manual §9.01G-4g states:

Each university should consider development of policies regarding office space for part-time employees, including adjunct faculty, graduate students, and emeritus faculty.

**ATTACHMENT B  
EMERITUS DESIGNATION POLICIES AT THE REGENT UNIVERSITIES**

**ELIGIBILITY**

<b>UNIVERSITY OF IOWA</b>	<b>IOWA STATE UNIVERSITY</b>	<b>UNIVERSITY OF NORTHERN IOWA</b>
<p> Automatic conferral of emeritus status upon retirement from the University, under honorable circumstances, including permanent disability sick leave, after serving for 10 years or more of continuous service to tenured or salaried clinical track faculty; central administrative officers, deans, and directors if they also hold regular faculty status; research scientists, research engineers, and library professional staff.</p> <p> Permissive conferral of emeritus status to president who does not qualify for automatic conferral by action of the Board of Regents.</p> <p> Permissive conferral of emeritus faculty status by the Executive Vice President and Provost to regular faculty; central administrative officers, deans, and directors with less than 10 years of service or to non-regular faculty who leave the University under honorable circumstances after serving a significant period of time.</p> <p> Permissive conferral of emeritus status by the Senior Vice President for Finance and Operations, in consultation with the Executive Vice President and Provost, to staff who would otherwise be eligible but who have served less than 10 years.</p> <p> Failure to approve permissive conferral of emeritus status is not subject to review under any of the University's grievance procedures.</p>	<p> Tenured faculty members who have attained the rank of professor and who retire immediately following 10 or more continuous years of employment at ISU are automatically given emeritus designation at the rank of professor.</p> <p> Retired faculty members who do not meet the above criteria but who have distinguished themselves through meritorious service to the university and the profession may receive emeritus designation at the last rank held. Nominations are approved by the college and the provost.</p> <p> Persons retiring from administrative duties may retain their administrative title with emeritus designation at the discretion of the president.</p> <p> A president, upon retirement, may be given the title "president emeritus" by the Board of Regents.</p> <p> Retired staff who have distinguished themselves through meritorious service to the university may be reviewed on an individual basis and receive emeritus designation at the discretion of the president.</p>	<p> Full-time or part-time faculty, institutional officials, and professional/scientific staff members at retirement or resignation who qualify may apply for or be nominated for emeritus status.</p> <p> Eligibility requirements include a minimum of 20 years of creditable full-time or part-time service in higher education with a minimum accumulation of 10 years of meritorious service at UNI.</p>

## EMERITUS PRIVILEGES

UNIVERSITY OF IOWA	IOWA STATE UNIVERSITY	UNIVERSITY OF NORTHERN IOWA
<ul style="list-style-type: none"> <li> Library and e-mail privileges.</li> <li> Parking; free hangtag, renewable on a two-year cycle, usable in any ungated faculty/staff parking lot or cashiered facility. Emeritus faculty or staff continuing to work in an office or providing a University-related service may receive access to other facilities, depending on need and availability. Emeritus parking tag does not provide free parking to athletic events. For a few retired long-term, high-level administrative staff, parking privileges have been granted at the request of central administration.</li> <li> Access to athletic and recreation facilities at the regular faculty/staff rate.<sup>2</sup></li> <li> Opportunity to enroll in the University's group Medicare supplemental insurance.<sup>2</sup></li> <li> There are no University-wide rules or criteria for making space and resource request decisions. Deans evaluate the space and resource requests using the criteria they think best.</li> <li> Listed in the University Catalog.</li> <li> May be hired to teach a few courses.</li> <li> Purchase of season athletic tickets at the staff rate by retirees who have purchased season tickets for the last five years or longer.<sup>2</sup></li> </ul>	<ul style="list-style-type: none"> <li> Listed in the University Catalog.</li> <li> Maintained on university mailing lists.</li> <li> Afforded regular faculty privileges concerning all events, activities, and services sponsored or provided by the university, such as the Library, Lied Recreation Center, e-mail account, and purchasing tickets to athletic events.</li> <li> General staff parking is available for all retirees. General staff parking for emeritus faculty is typically in conjunction with having shared office space on campus to engage in research or scholarly work that benefits ISU.</li> <li> Provided limited office space when available. Emeritus faculty who receive office space generally still bring in grants.</li> <li> May be hired to teach a few courses.</li> </ul>	<ul style="list-style-type: none"> <li> Title of professor emeritus/a regardless of previous rank.</li> <li> Notification regarding important developments and changes affecting emeritus interests or relations with the university.</li> <li> University identification card.</li> <li> Listing in university catalogs and telephone books.</li> <li> Library privileges, including photo duplication<sup>1</sup>.</li> <li> Use of audio-visual equipment; fee assessed for personal use.</li> <li> Free parking privileges in specific lots<sup>1</sup>.</li> <li> Use of university recreational and social facilities, subject to usual fees, including the University Wellness Center<sup>1</sup>.</li> <li> Attendance at campus events open to employees<sup>1</sup>.</li> <li> Receipt of specific campus publications<sup>1</sup>.</li> <li> Invitation to public ceremonies commencement, etc.</li> <li> Use of university mailing address.</li> <li> Attendance at faculty meetings.</li> <li> Opportunity to audit courses tuition free, contingent on space availability and instructor approval.</li> </ul> <p>Eligible for, when available:</p> <ul style="list-style-type: none"> <li> Office space and office fixtures.</li> <li> Work study student assistance.</li> <li> Use of lab, word processing, and computer services.</li> <li> Assistance in defraying costs incurred in travel to present papers.</li> <li> Service on master's and doctoral committees.</li> <li> Nominal institutional support for professional proposals submitted to funding agencies.</li> <li> Part-time professional employment.</li> <li> Participation in appropriate campus seminars, etc.</li> <li> Assignment to individual faculty studies at the University library.</li> </ul>

<sup>1</sup>Includes emeritus/a spouses and domestic partners.

<sup>2</sup>Privileges available to all University retirees.