



Kum-Kum Bhavnani
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*Chair of the Assembly of the Academic Senate
Faculty Representative to the Regents
University of California
1111 Franklin Street, 12th Floor
Oakland, California 94607-5200*

February 28, 2020

**SUSAN CARLSON, VICE PROVOST
ACADEMIC PERSONNEL**

Re: Proposed Revised APM Section 120 (Emerita/Emeritus Titles)

Dear Susan,

As you requested, I distributed for systemwide Senate review the proposed revised APM 120. All ten Academic Senate divisions and six systemwide committees (UCAF, UCAP, UCAADE, UCPB, UCFW, and UCPT) submitted comments. These comments were discussed at Academic Council's February 26, 2020 meeting and are attached for your reference.

We understand that the proposed revisions are intended to conform with changes to Regents Policy 1203 (Policy on Emerita/Emeritus Title Suffix) made during a realignment of Regents Standing Orders in 2018. The revisions provide for a new gender inclusive form of Emerita/Emeritus—"Emer." They also include a provision that permits campuses to develop local criteria, policies, and procedures for bestowing the Emerita/Emeritus/Emer. title on Senate faculty who do not have the tenured titles of Professor or Associate Professor, and on non-Senate academic appointees. Finally, they address the conferral of the Emerita/Emeritus/Emer. title for Dean or Faculty Administrator titles, and procedures for disqualifying individuals from the titles.

First, the Senate appreciates the effort to provide a gender inclusive form of the title suffix; however, some reviewers found "Emer." to be awkward, and Council encourages UCOP to consider the alternative suggestions "Emerit" or "Emeritx".

Many Senate reviewers expressed concern about the revision to Regents Policy 1203, which changed eligibility for the emeritus/emerita status of Senate faculty outside of the professorial series, and limited the automatic conferral of those titles to tenured, ladder-rank Senate faculty with the titles Professor and Associate Professor. Reviewers observed that in the past, all Senate members automatically received emerita/emeritus status; however, under the revised Regents Policy, Senate Health Sciences titles such as "in Residence" and "Clinical X" – as well as Lecturers with Security of Employment and Teaching Professors – are excluded from this automatic recognition. This additional policy change took many reviewers by surprise. The attached letters from UCSF detail the chronology of events that led to the adoption of Regents Policy 1203. It appears that a revision intended to give the Senate more control over conferral of the titles had unintended consequences, and unfortunately, that revision did not receive thorough vetting by the Academic Senate or a systemwide review.

Given that faculty in non-tenured Senate titles make important contributions to research, teaching, and service, Council believes they deserve to have access to automatic Emerita/Emeritus/Emerit status. Council understands that in practice, many campuses treat all faculty in the same manner regardless of their security of employment, and believes it is inconsistent to set a higher bar for obtaining emeriti status for one group. While the revised APM 120 policy permits campuses to develop local criteria and procedures for conferring Emerita/Emeritus/Emerit status, this work-around adds an unnecessary administrative burden that is also inequitable in that it disproportionately affects divisions with healthcare enterprises.

Council recommends that Regents Policy 1203 be rescinded and restored to the language of the previous Standing Order, and encourages UCOP to revisit conforming changes in APM 120 to ensure that the criteria for Emerita/Emeritus/Emerit status apply across-the-board to professorial Senate faculty with tenure, to Senate faculty without tenured titles, and LSOEs.

Thank you for the opportunity to opine. Please do not hesitate to contact me if you have additional questions.

Sincerely,

A handwritten signature in cursive script that reads "Kum-Kum Bhavnani".

Kum-Kum Bhavnani, Chair
Academic Council

cc: Academic Council
Senate Directors



February 19, 2020

KUM-KUM BHAVNANI
Chair, Academic Council

Subject: Comments on the Proposed Revisions to Academic Personnel Manual Section 120

Dear Kum-Kum,

On January 27, 2020, the Divisional Council (DIVCO) of the Berkeley Division discussed the proposed revisions to the Academic Personnel Manual Section 120 (APM - 120) and expressed no objections to the revised policy. The Committees on Budget and Interdepartmental Relations (BIR); Faculty Welfare (FWEL); and Rules and Elections (R&E) reviewed and provided comments (see attached).

DIVCO emphasized that gender-neutral language is important, and that a better term than "Emer." should be used. The abbreviation of "Emer." can be understood as an abbreviation of "emergency," and not a gender-inclusive term for emeritus, emeriti, or emerita. DIVCO's suggested the term "Emerit."

Thank you for the opportunity to comment. If you have any questions, please don't hesitate to contact me.

Sincerely,

Oliver O'Reilly
Chair, Berkeley Division of the Academic Senate
Professor of Mechanical Engineering

Enclosures (3)

cc: Mary Ann Smart, Chair, Committee on Budget and Interdepartmental Relations
David Hollinger, Chair, Committee on Faculty Welfare
J. Keith Gillless, Chair, Committee on Rules and Elections
Sumei Quiggle, Associate Director staffing Graduate Council and Undergraduate Council
Courtney McIntyre, Senate Analyst, Committee on Budget and Interdepartmental Relations
Sumali Tuchrello, Senate Analyst, Committee on Faculty Welfare

January 16, 2020

VICE PROVOST BENJAMIN E. HERMALIN

RE: Systemwide Review of Proposed Revisions to Academic Personnel Manual (APM), Section 120, Emerita/Emeritus Titles (APM-120)

Thank you for the opportunity to review the proposed changes to Academic Personnel Manual (APM), Section 120, which pertains to Emerita/Emeritus Titles.

This committee expresses no objection to the proposed changes, which include elements of both systemwide uniformity and deference to local practice—the latter in the case of criteria for Senate faculty not holding the title of Professor or Associate Professor. We note that while for ladder faculty the “Emer.” title is automatic and perhaps similar to the use of “Ret.” by officers of the military, for non-ladder titles nomination on the basis of specific achievements is required, so that “Emer.” continues to point to a distinction of quality. We presume that the intent of the proposed changes is to make that difference (in the meaning of the title) permanent, and we hope that this policy will have no invidious consequences for retired non-Emer. faculty in gaining access to university resources. We also understand that it has been thought necessary to specify for all faculty categories the conditions under which Emer. status can be rescinded.

A handwritten signature in black ink that reads "Mary Ann Smart". The script is fluid and cursive, with the first letters of each word being capitalized and prominent.

Mary Ann Smart
Chair

MAS/cm



December 11, 2019

CHAIR OLIVER O'REILLY
Academic Senate

Re: Proposed Revisions to APM – 120, Emerita/Emeritus Titles

Dear Oliver,

At our meeting on November 25, 2019, the Faculty Welfare Committee reviewed the proposed revisions to APM – 120, Emerita/Emeritus Titles as circulated for systemwide review. Although initially the discussion seemed inclined towards supporting a set of changes that presented as modernizing the APM to socially current language, a deeper read of the changes aroused a series of concerns from members that we itemize below.

First, as a matter of principle, an abbreviation should make clear what it is that is being abbreviated. To the FWEL members, the abbreviation of “Emer” strikes us as an abbreviation for “emergency”, not a gender-inclusive form of emeritus, emeriti, or emerita. To that end, we strongly advocate the abbreviation, “Emerit.” The proposed “Emer” is unsatisfactory, and should be dropped.

Second, members found it objectionable that under APM -120-10: Criteria, academic appointees who are Senate members without the title of Professor or Associate Professor are now being subjected to criteria, listed in items (1) and (2) that substantially differ from that of “regular” Senate faculty in the preceding passage. On a campus such as Berkeley’s, where we functionally treat the same all of our faculty regardless of their security of employment, it is inconsistent to set a higher bar for obtaining emeriti status for one group over the other. We recommend that this section be changed so that it would not be a barrier to lecturers with security of employment (and similarly titled Senate members) from attaining the emeriti title.

Third, regarding the allocation of office and lab space for emeriti, covered under APM – 120-80: Procedures: d.: Allocation of space resources, we note that the new language emphasizes that “The University is eager to support the activities...”. Given the realities that, for our campus and we believe to be true for some of our sister campuses, research spaces are limited, some members of this Committee wondered if this new passage creates an expectation of an entitlement. In the Berkeley context, there is a disparity between the principle of this passage, to actively support emeriti activities with research space, versus the reality that research and instructional space is at a premium. It is our

understanding that the pricing schemes established for office and lab spaces at some Berkeley units are intentionally written to support first younger faculty over other active or emeriti faculty. Rather than framing this as a strong, universally applicable principle of the University, we recommend that the language be softened, and amended with a preamble, to reflect “The University **recognizes the importance of the contributions that emeriti make to support the University’s research function and, therefore, it is in the interest of the University** to support the activities... [bolding added only to highlight the recommended changes].

Related to this third point, we wonder if the campus has sufficiently surveyed the allocation of research space for emeriti. It is our understanding that the largest impediment for many departments to encourage retirement is the faculty’s expected loss of offices and other research space. Creating more parity between departments, regardless of their current resource allocations, and/or creating commonly available office spaces across departments would be steps in the direction of easing faculty concerns when considering retirement. We understand that efforts in this vein from the Office of the Vice Provost for Faculty and the UC Berkeley Emeriti Associate have been largely stalled due to broader constraints in the realm of capital planning. We urge that DIVCO monitor this important equity issue.

We appreciate Divisional Council’s consideration of these recommendations and the opportunity to weigh in on these matters.

Sincerely,

A handwritten signature in dark ink, appearing to read "David Hollinger".

David Hollinger, Co-Chair

David Steigmann, Co-Chair

DH/DS/st



December 17, 2019

OLIVER O'REILLY
Chair, Berkeley Division

Re: Proposed revisions to APM 120 Emerita/Emeritus Titles

Dear Chair O'Reilly,

At its meeting on December 5, the Committee on Rules and Elections discussed the proposed revisions to Academic Personnel Manual 120 Emerita/Emeritus Titles. In general we do not object to the adoption of the abbreviation "Emer." (We did note that the abbreviation is listed as an option in the Policy (120-0) but not in the numbered items 1-3 below.) Following are some additional issues raised during our discussion.

- 1) The potential need for some recognition in the APM that faculty (and some other classes of employees) should be free to use (or continue using) working titles such as Chair Emeritus or Director Emeritus in their professional lives. We worried that by establishing such strict limits on the "Emeritus" title that we are setting people up for embarrassment in contexts like being "qualified" as an expert in legal proceedings. I've been through that experience several times, and have seen attorneys ruthlessly expose point out any puffery in other experts' CVs.
- 2) Use of "Emeritus" in reference to deans, vice chancellors, vice provosts, chancellors, etc., is generally a temporal reference to prior service rather than a reference to active duty vs. retired status, whereas in reference to professors the word is understood to imply having retired from active duty. The conflation of the uses of "Emeritus" for individuals' professorial duty status with prior administrative service in the proposed revisions creates new problems while solving no identifiable problem.
- 3) The use of "Emeritus" for administrative positions not customarily held by professors has aspects that are similar to those identified for Chairs, Directors, Deans, etc., although it is difficult to understand why the university would want to override the complex social conventions that lead one to attach "Emeritus" to titles like Vice Chancellor, Associate or Assistant Vice Chancellor, Registrar, or Librarian, or why the campus would want to define a time-consuming process for "awarding" the title to individuals upon request or nomination.
- 4) At minimum, we suggest that the wording in 120-10.d should be changed from "A Dean or Faculty Administrator *who holds that title at the time of retirement* may be conferred the Emerita/Emeritus/Emer. title suffix..." to "*who held that title*" (strike "at the time of retirement") for chancellors and deans.

5) We did discuss the possibility that the policy might be motivated by a desire to withhold “Emeritus” from an administrative title such as dean or chancellor for individuals whose actions resulted in them being forced to step down from an administrative position and return to their underlying faculty positions. Given how rarely this occurs, and given the authority outlined in the policy to withhold the “Emeritus” designation, and the option of specifying that the designation will be withheld as part of the negotiations that resulted in an individual stepping down, it is unclear why the university would be well served by an “indirect” withholding of the title due to stepping down before retirement.

Other than providing for the option of using the non-gendered designation, we were left with an overwhelming feeling that we are dealing with a policy proposal in search of a problem.

Sincerely,

A handwritten signature in blue ink, appearing to read "J. Keith Gilles", with a stylized flourish at the end.

J. Keith Gilles
Chair, Committee on Rules and Elections

JKG/scq



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February 18, 2020

Kum-Kum Bhavnani
Chair, Academic Council

RE: Proposed Revisions to APM 120, Emerita/Emeritus Titles

Dear Kum-Kum:

The proposed revisions to APM 120 were forwarded to all standing committees of the Davis Division of the Academic Senate. Seven committees responded: Academic Personnel Oversight (CAP), Faculty Welfare, Emeriti, and the Faculty Executive Committees of the College of Letters and Science (L&S), the Graduate School of Management (GSM), the School of Law (LAW), and the School of Medicine (SOM).

Committees support adding a gender inclusive title suffix. Emeriti and Faculty Welfare think “Emer.” might be awkward or confusing—or even too similar to “Emergency.” Faculty Welfare suggests “Emeritx” or “Emerit” as alternatives.

CAP is concerned that the policy “establishes different criteria for the conferral of the title suffix Emerita/Emeritus/Emer. for tenured versus nontenured Senate faculty. While tenured Senate members in the Professor series receive this conferral automatically upon retirement, non-tenured Senate members (such as Professors of Clinical X) must meet specific criteria.” CAP recommends making the policy more inclusive by “establishing the automatic conferral of the title suffix Emerita/Emeritus/Emer. for all Senate members upon retirement.”

The Davis Division appreciates the opportunity to comment.

Sincerely,

A handwritten signature in black ink that reads "Kristin H. Lagattuta". The signature is fluid and cursive.

Kristin H. Lagattuta, Ph.D.
Chair, Davis Division of the Academic Senate
Professor, Department of Psychology and Center for Mind and Brain

Enclosed: Davis Division Committee Responses

c: Hilary Baxter, Executive Director, Systemwide Academic Senate
Michael LaBriola, Assistant Director, Systemwide Academic Senate
Edwin M. Arevalo, Executive Director, Davis Division of the Academic Senate

Committee on Academic Personnel – Oversight Committee
Request for Consultation Response: Proposed Revisions to APM 120, Emerita/Emeritus Titles

The Committee on Academic Personnel (CAP) – Oversight Committee has reviewed and discussed the proposed revisions to APM 120, Emerita/Emeritus Titles. CAP is concerned that the policy establishes different criteria for the conferral of the title suffix Emerita/Emeritus/Emer. for tenured versus non-tenured Senate faculty. While tenured Senate members in the Professor series receive this conferral automatically upon retirement, non-tenured Senate members (such as Professors of Clinical X) must meet specific criteria.

CAP recommends making this policy more inclusive and establishing the automatic conferral of the title suffix Emerita/Emeritus/Emer. for all Senate members upon retirement.

The Faculty Welfare Committee has reviewed the RFC “Proposed Revisions to APM 120, Emerita/Emeritus Titles”. Overall the committee has no objections, but do feel Emer may be confusing since it is too similar to Emergency so offer other options such as Emeritx or Emerit.

The Emeriti committee discussed APM 120 and the committee felt that the title Emer. seemed awkward but had no specific objections. One committee member did, however, examine APM 160 and APM 120 and did have several observations and comments. These are appended below.

The draft APM 120 is OK at a general level. However there are some details that should be fixed.

1) A point of logic: Although it's hard to find real definitions in policy, I think that the separation date is the last day of paid employment and the retirement date is the first day of receiving UCRP retirement benefits. In the typical case, these are consecutive days. So if one's last day of employment is June 30, then one is no longer a professor on July 1, the first day of retirement. So then the following are not quite correct.

"The title suffix Emerita/Emeritus shall be conferred, upon retirement, on every Professor and Associate Professor."

and

"An academic appointee must hold a title at the time of retirement (2) in order to be eligible to be conferred the Emerita/Emeritus/Emer. title suffix with that title."

Perhaps this partly explains the end of footnote 2

"The title suffix Emerita/Emeritus/Emer. shall be granted automatically to Professors and Associate Professors when the effective date of any of these actions is within 120 days of separation from the University."

However so far as I can tell at the moment, this statement is not in Regents policy. And where does the particular choice of 120 days come from? Is that just an arbitrary made up number? Should it be larger or smaller?

And then much further below in 120-80 Procedures, we finally have

"Conferral of the Professor Emerita/Emeritus/Emer. title suffix shall be effected by the processing of the appropriate payroll action which effects a change in employment status defined as 'retirement' for the purposes of this policy (3)" This is clear enough, but it does not appear until the 4th page of the policy. 'Seems to me that the whole draft policy could be rewritten to improve clarity (and also be shorter and more direct).

2) There is also an issue with the connection to APM 016. This proposed version of APM 120 provides no provision for denying the conferral of Emerita, etc. status to ladder faculty at the Professor or Associate Professor level. Conferral is automatic---a good thing in my view. In 120-24 there is a provision for curtailing (but not denying) emerita, etc. status. This can be done by the President.

On the other hand, APM-016 states as a possible sanction "Denial or Curtailment of Emeritus Status. Denial or curtailment of current or future emeritus status of a faculty member, including the privileges associated with the emeritus status. [...] Authority for the denial or curtailment of emeritus status of a faculty member rests with the President, on recommendation of the Chancellor."

So on the surface of it, draft APM 120 and APM 016 are in conflict. This is not a picky or hypothetical point. Over the years, I have been informed of a few cases where faculty members have been threatened by the UCD administration with denial of emeritus status (among other things). If APM-120 is in force, then that cannot be done. And even if it could be done per APM 016, it would have to be on the authority of the President not the local administration."

February 18, 2020

KUM-KUM BHAVNANI
CHAIR, ACADEMIC COUNCIL

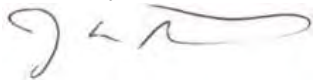
RE: Systemwide Review of Proposed Revisions to APM 120, Emerita/Emeritus Titles

The Irvine Division Cabinet discussed the proposed revisions to APM 120 at its meeting on February 18, 2020. The proposed revisions were initially reviewed by the Council on Academic Personnel and the Council on Faculty Welfare, Diversity, and Academic Freedom.

The Cabinet agreed that it would prefer for criteria regarding the emeritus/emmerita status of non-tenured Senate faculty be developed at the campus level rather than having to conform to the proposed systemwide criteria. Please note, moreover, that members expressed strong opposition to the revised Regents policy changing eligibility requirements for automatic conferral of emeritus/emmerita status of faculty outside of the professorial series (most notably LSOE/professors of teaching). Members had no concerns about the other proposed policy revisions.

The Irvine Division appreciates the opportunity to comment.

Sincerely,



James Steintrager, Chair
Academic Senate, Irvine Division

C: Jeffrey Barrett, Chair Elect-Secretary
Brandon Haskey-Valerius, Cabinet Analyst
Gina Anzivino, Assistant Director



UCLA Academic Senate

February 18, 2020

Kum-Kum Bhavnani
UC Academic Senate Chair

Re: Proposed Revisions to APM 120 related to Emerita/Emeritus titles

Dear Chair Bhavnani,

Thank you for providing the Academic Senate with the opportunity to comment on the Proposed Revisions to APM 120 related to Emerita/Emeritus titles.

The Executive Board of the UCLA Academic Senate support the policy revisions that allow local procedures to determine the conferral of the Emerita/Emeritus/Emer title suffix to non-Senate academic appointees.

Again, we appreciate the opportunity to opine.

Sincerely,



Michael Meranze
Chair, UCLA Academic Senate

Cc: Hilary Baxter, Executive Director, Systemwide Academic Senate
Joseph Bristow, Immediate Past Chair, UCLA Academic Senate
April de Stefano, Executive Director, UCLA Academic Senate
Mary Gauvain, Vice Chair, Systemwide Academic Senate
Michael LaBriola, Assistant Director, Systemwide Academic Senate
Shane White, Vice Chair/Chair Elect, UCLA Academic Senate

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OFFICE OF THE ACADEMIC SENATE
TOM HANSFORD, CHAIR
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FEBRUARY 4, 2020

KUM-KUM BHAVNANI, CHAIR, ACADEMIC COUNCIL

RE: PROPOSED REVISIONS TO APM - 120, EMERITA/EMERITUS TITLES

Dear Chair Bhavnani:

The proposed revisions to [APM-120 Emerita/Emeritus Titles](#) were distributed for comment to the standing committees and School Executive Committees of the Merced Division. At its February 3, 2020 meeting, Divisional Council endorsed forwarding for Academic Council's consideration the enclosed comments from the Committee on Academic Personnel (CAP), the Committee for Diversity and Equity (D&E), the Committee on Faculty Welfare and Academic Freedom (FWAF), the Committee on Rules and Elections (CRE), and the School of Natural Sciences Executive Committee.

For ease of access, committee comments are summarized here.

- CAP endorses the proposed revisions.
- D&E is in favor of the proposed revisions and believes that they are more inclusive of faculty and benefit equity by preventing an honor from being bestowed on faculty whose actions departed from the values and policies of the University.
- FWAF endorses the proposed revisions.
- CRE recommends a friendly amendment.
- SNS Executive Committee has nothing significant to add.

The Merced Division thanks you for the opportunity to opine on these proposed revisions.

Sincerely,

A handwritten signature in black ink, appearing to read "Tom Hansford".

Tom Hansford
Chair, Divisional Council

CC: Divisional Council
Hilary Baxter, Executive Director, Systemwide Academic Senate
Fatima Paul, Interim Executive Director, Merced Senate Office

Encl (6)

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ACADEMIC SENATE, MERCED DIVISION
COMMITTEE ON ACADEMIC PERSONNEL (CAP)
NELLA VAN DYKE, CHAIR
nvandyke@ucmerced.edu

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(209) 228-4369

December 13, 2019

To: Tom Hansford, Senate Chair

From: Nella Van Dyke Chair, Committee on Academic Personnel (CAP)

Re: Proposed APM 120 Revisions – Emerita/us Title

CAP reviewed the proposed revisions to APM 120 and is pleased to endorse.

We appreciate the opportunity to opine.

Cc: Senate Office

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ACADEMIC SENATE, MERCED DIVISION
COMMITTEE FOR DIVERSITY AND EQUITY

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January 17, 2020

To: Tom Hansford, Chair, Divisional Council

From: Committee for Diversity and Equity (D&E)

Re: Proposed Revised APM-120, Emerita/Emeritus Titles

On December 17, members of D&E reviewed the proposed revisions to Academic Personnel Manual Section 120, which would (1) provide a gender-inclusive title suffix of "Emer.", (2) change the policy for non-tenured Senate faculty to be recommended for emeriti status based on "evidence of noteworthy and meritorious contributions to the educational mission and programs of the University, as determined by local procedures," (3) use the same language as in Regents Policy 1203 for disqualification criteria for non-tenured Senate faculty or non-Senate appointees, (4) clarify the use of the emeriti status for deans and faculty administrators, (5) define "retirement" for Savings Choice participants as "separation from the University after reaching normal retirement age with five or more years of service," (6) clarify curtailment authority, and (7) incorporate materials from Appendix A into the main policy text and rescind Appendix A. The revisions include criteria of "lack of serious breaches of policy or law, dismissal from the University, or serious discipline while holding the position for which the Emerita/Emeritus/Emer. title is requested," which would disqualify the appointee from conferral of the title.

D&E believes these changes are more inclusive of faculty by providing the gender-inclusive suffix. These changes also benefit equity by preventing an honor from being bestowed on faculty whose actions departed from the values and policies of the University.

The Committee for Diversity and Equity is in favor of the revisions and appreciates the opportunity to opine.

cc: D&E Members
Fatima Paul, Interim Executive Director, Senate Office
Senate Office

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ACADEMIC SENATE, MERCED DIVISION
COMMITTEE ON FACULTY WELFARE AND ACADEMIC FREEDOM
CAROLIN FRANK, CHAIR
cfrank3@ucmerced.edu

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5200 NORTH LAKE ROAD
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January 21, 2020

To: Tom Hansford, Chair, Division Council

From: Carolin Frank, Chair, Committee on Faculty Welfare and Academic Freedom (FWAF)

Re: Proposed Revisions to APM 120 - Emerita/Emeritus Titles

FWAF reviewed the proposed revisions to APM 120 pertaining to emerita/emmeritus titles. The committee endorses the proposed revisions and appreciates the opportunity to opine.

cc: Senate office

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ACADEMIC SENATE, MERCED DIVISION
COMMITTEE ON RULES AND ELECTIONS (CRE)

UNIVERSITY OF CALIFORNIA, MERCED
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January 24, 2019

To: Tom Hansford, Chair, Divisional Council

From: Christopher Viney, Chair, Committee on Rules and Elections

Re: [Systemwide Review of Proposed Revisions to APM 120 – Emerita/Emeritus Titles](#)

Members of the Committee on Rules and Elections have reviewed the proposed revisions of APM 120 – Emerita/Emeritus Titles and offer the following comments and suggestion:

From a procedural standpoint, the revisions are being proposed via the proper process, and for proper reasons.

In APM-120-10, footnote 2 (page 5 of this document), an effort is made to define "retirement" for Savings Choice participants. The term "having separated from the university" is introduced. But, the emeritus / emerita / emer. status conveys some sense of continuing attachment and privilege, and even continuing service. Perhaps "having separated from the university payroll" might be a more appropriately accurate (less contradictory) description of the relationship in retirement?

We appreciate the opportunity to opine.

Cc: CRE Members
Senate Office

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SANTA BARBARA • SANTA CRUZ

SCHOOL OF NATURAL SCIENCES

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27 January 2020

To: Tom Hansford, Chair, Merced Division of the Academic Senate

From: Kevin Mitchell, Chair, Natural Sciences Executive Committee

Re: Systemwide Senate Review: Proposed Revised APM - 120, Emerita/Emeritus Titles

The SNS Executive Committee has considered the proposed revisions to APM 120. We have nothing significant to add to this discussion.

As always, the SNS Executive Committee appreciates the opportunity to opine.



CHAIR, ACADEMIC SENATE
RIVERSIDE DIVISION
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February 18, 2020

Kum-Kum Bhavnani, Chair, Academic Council
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RE: (Systemwide Senate Review) Proposed Revised APM - 120, Emerita/Emeritus Titles

Dear Kum-Kum,

The UCR Division's Executive Council discussed the proposed revisions at its regular meeting of February 10, 2020. Members did not add anything significant to the standing committees' reviews, although there were questions raised regarding the rationale for the proposed revisions. Harry Tom, Chair of the Committee on Planning and Budget, discussed that the matter of Emeriti definition and compensation was discussed at the systemwide UCAP meeting that he recently attended. Divisional Chair Dylan Rodríguez focused on the UCSF summary document that was added for Executive Council's review following the systemwide conversation among Divisional Chairs and other Senate leadership. UCR Executive Council understands and affirms UCSF's significant concerns regarding the review process and timeline for these proposed revisions and urges the administration to revisit them under the auspices of rigorous, transparent, and well-timed Senate review.

We are thankful for the opportunity to contribute to this consultation.

Sincerely yours,

A handwritten signature in dark ink, appearing to read "Dylan Rodríguez", is written over a light blue horizontal line.

Dylan Rodríguez
Professor of Media & Cultural Studies and Chair of the Riverside Division

CC: Hilary Baxter, Executive Director of the Academic Senate
Cherysa Cortez, Executive Director of UCR Academic Senate Office

Office of the Academic Senate

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Shamila Majumdar, PhD, Chair
Steven Cheung, MD, Vice Chair
Vineeta Singh, MD, Secretary
Jae Woo Lee, MD, Parliamentarian

February 14, 2019

Kum-Kum Bhavnani, PhD
Chair, Academic Council
Systemwide Academic Senate
University of California Office of the President
1111 Franklin St., 12th Floor
Oakland, CA 94607-5200

Re: Issuance of Technical Revisions to Academic Personnel Manual
(APM) Section 120, Emerita/Emeritus Titles (APM - 120)

Dear Kum-Kum:

The San Francisco Division has reviewed the technical revisions to APM-120, and the preceding changes to Regents Policy 1203. These amendments included: 1) adding gender-inclusive terms; 2) clarifying that the conferral of emerita/emertus title suffix, upon retirement, is not automatic for academic appointees other than Professors or Associate Professors; and 3) stipulating that the Academic Senate shall make a recommendation to the President of the University or designee regarding the conferral of the emerita/emertus title suffix on all academic appointees other than Professors or Associate Professors. Our principal objection to both APM-120 and Regents Policy 1203 concerns the elimination of automatic conferral of *Emerita/Emeritus* status to faculty in the In-Residence and Clinical X series upon retirement.

The UCSF Senate is opposed to this amendment in the language of Regents Policy 1203 (and the subsequent language of APM 120) for the following reasons: 1) It could create a significant burden on the Academic Senate Divisions (particularly the Committees on Academic Personnel or CAPs); 2) is an oversight; and 3) introduces inequitable treatment of faculty in the six campuses with healthcare enterprises and 4) there are significant adverse implications for faculty diversity as it affects women faculty significantly. The Senate supports APM 120 revision to return to the longstanding policy of "the title suffix emerita/emertus for positions held at the time of retirement shall be conferred, upon retirement, on *every member of the Academic Senate*."

At UC Health Sciences campuses, ladder-rank faculty represent a minority of the faculty. Indeed, most Senate faculty are members of the In-Residence and Clinical X series. This change removes automatic conferral of *emerita/emertus* status to significant portions of the Faculty who make important contributions to research, teaching, and service. In addition, this policy has a disparate impact on URM faculty, as these faculty are under-represented in the ladder-ranked series, but are better represented in the Clinical X and In-Resident series. In 2018 at UCSF, 72% of the Ladder-Rank series were white, and 67% were male. By contrast, these percentages were somewhat lower in the Clinical X

and In-Residence series, at 62% and 63% respectively. There are also more female faculty in these latter series, at 43% and 41% respectively.¹

In addition to the disparate impact on our faculty, we also note that Regents Policy 1203 did not receive proper vetting and review by Academic Council. Although an email was sent to Academic Council members on the evening before the Academic Council meeting on Wednesday, October 25, 2017, it was not reflected as an agenda item, the attachment circulated by email did not include strike-through formatting, nor did it highlight the rescission of the automatic conferral of Emeritus status for academic appointees other than Professor or Associate Professors (e.g., faculty in the ladder-rank series). As such, it was approved hastily without clear assessment of the impact of this change on faculty in the Health Sciences.

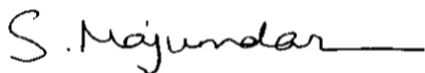
As noted above, if passed, this revised APM would remove automatic conferral of Emeritus status to significant portions of the Senate Faculty who make important contributions to research, teaching, and service. Although bestowal of the Emeritus status is still possible under the proposed new APM 120, it would now require a separate process, which is divisive, and could be burdensome on the Senate Divisional CAPs, depending upon the local Academic Personnel response to the proposed change in policy. Finally, given the significant contributions that these latter two faculty series make to the University, the current APM 120 would create undesirable inequity among Senate faculty groups.

In addition to our principal points above, I would like to present a short digest of other comments from the Division's standing committees that have a bearing on this proposed change:

- CAP expressed support for the changes making the language of the policy gender inclusive, but opposed the policy change as it related to emerita/emergitus status.
- CFW noted that a systemwide group dedicated to the health sciences could have helped identify and resolve this issue.
- CAC and COR emphasized the impact this change would have on UC research faculty in Academic Senate series, who do not receive salary support from the State of California.
- UCSF's Space Committee noted that retired faculty with emerita/emergitus status have the right to request space from the University.
- We further unanimously supported an amendment to Regents Policy 1203 to reflect the conferral of emerita/emergitus title to senate faculty.

Thank you for the opportunity to comment on this important APM revision. If you have any questions, please let me know.

Sincerely,



Sharmila Majumdar, PhD, 2019-21 Chair
UCSF Academic Senate

Enclosures (5)

Cc: Lundy Campbell, MD
Geraldine Collins-Bride, RN, MS, FAAN
Lea Grinberg, MD, PhD
Sneha Oberoi, BDS, DDS, MDS
Vineeta Singh, MD

¹ UCSF Academic Personnel Office. See <https://academicaffairs.ucsf.edu/academic-personnel/media/Faculty%20Headcount%202018.pdf>.

Communication from the Committee on Academic Personnel

Lundy Campell, MD, Chair

February 6, 2020

TO: Sharmila Majumdar, Chair of the UCSF Division of the Academic Senate

FROM: Lundy Campbell, Chair, Committee on Academic Personnel
Sandy Feng, Vice Chair, Committee on Academic Personnel

CC: Todd Giedt, Executive Director of the UCSF Academic Senate Office; Kenneth Laslavic, Senior Analyst of the UCSF Academic Senate Office

RE: Academic Personnel Manual Section 120 (APM – 011): *Systemwide Review of Proposed Revisions to APM Section 120, Emerita/Emeritus Titles*

Dear Chair Majumdar:

At the February 5, 2020 meeting, the Committee on Academic Personnel (CAP) reviewed the newly proposed APM-120: *Systemwide Review of Proposed Revisions to APM Section 120, Emerita/Emeritus Titles*

CAP is supportive of the gender inclusive title suffix changes, but has concerns about the below matters:

1. Changing the conferring of emerita/emeritus title suffix, upon retirement, to be automatic only for Ladder Rank Series faculty. At present, it is automatic for all Senate Series faculty at UCSF, and upon request and review for non-Senate series dependent on their responsibilities and duties. Changing the conferring of this status to only Ladder rank introduces inequitable treatment of faculty in the six campuses with healthcare enterprises.
 - a. CAP's position is that APM 120 be revised to support a return to the longstanding policy of "the title suffix Emer for positions held at the time of retirement shall be conferred, upon retirement, on every member of the Academic Senate."
2. Per policy, the UC President consults with both the Provost and the Chair and Vice Chair of the systemwide Academic Senate on such APMs and proposed amendments to them. These revisions were presented without track changes to Academic Council members the evening prior to a meeting, and without notifying members of the significant change to conferring Emer status. These actions do not reflect the customary transparency nor due process that is expected in interactions between the Administration and the Academic Senate.
 - a. At UC Health Sciences campuses, Ladder Rank faculty represent a minority of the faculty. Indeed most Senate faculty are members of the In Residence and Clinical X Series. This change, without appropriate review, removes automatic conferral of Emer status to significant portions of the faculty who make important contributions to research, teaching, and service.

CAP looks forward to seeing a second revision of APM-120 providing clarification on the raised issues. If you have any questions about CAP's comments, please contact myself, or Academic Senate Associate Director Alison Cleaver (alison.cleaver@ucsf.edu).

February 12, 2020

Professor Sharmila Majumdar, PhD
Chair, UCSF Academic Senate

RE: Systemwide Review of Proposed Revisions to APM 120 Related to *Emerita*/*Emeritus* Titles

Dear Chair Majumdar,

The Committee on Faculty Welfare strongly supports rescinding Regents Policy 1203, which removes automatic conferral of *emerita/emeritus* status to faculty in the In-Residence and Clinical X series upon retirement. These faculty make important contributions to research, teaching, and service, and their contributions should continue to be recognized by the automatic conferral of *emerita/emeritus* status.

The Regents passed Policy 1203 without following proper procedure. The President should consult with the Chair and Vice Chair of the Academic Senate on proposed revisions to APMs. In this case, the President did not have adequate consultation from the Academic Senate. Senate Chair Shane White sent the proposed revisions to Academic Council members the night before the Academic Council meeting on October 25, 2017. The late email did not point out the elimination of the automatic conferral of *emerita/emeritus* status on In-Residence and Clinical X faculty. Further, the attachment that contained the policy did not have strike-through formatting. Unsurprisingly, Academic Council members were not aware that automatic conferral of *emerita/emeritus* status was being taken away from their In-Residence and Clinical X series colleagues.

At UCSF, most Senate faculty are not ladder-rank Professors or Associate Professors. Most are members of the In-Residence and Clinical X series. Had there been a meaningful opportunity to review Regents Policy 1203, the adverse effect on health sciences faculty could have been raised and addressed. Instead, the inadequate review led to a policy that devalues the work and contribution of health sciences faculty. Thus, the Committee on Faculty Welfare strongly supports rescinding Regents Policy 1203 and correcting the policy so that it values the contributions of all Senate faculty including those in the In-Residence and Clinical X series by automatically granting them *emerita/emeritus* status upon retirement.

Last, the Committee on Faculty Welfare notes that a systemwide group dedicated to the health sciences could have helped identify and resolve this issue. The Committee on Faculty Welfare supports efforts to create a standing systemwide committee on health sciences. Such a committee would help the University advance its commitment to public service by keeping the systemwide Senate informed about issues involving the health sciences and the delivery of health care.

Sincerely,

Sneha Oberoi, BDS, DDS, MDS
Chair, Committee on Faculty Welfare
UCSF Academic Senate
2019-2020

February 12, 2020

Professor Sharmila Majumdar, PhD
Chair, UCSF Academic Senate

RE: Systemwide Review of Proposed Revisions to APM 120 Related to *Emerita/Emeritus* Titles

Dear Chair Majumdar,

The Clinical Affairs Committee writes to request that Regents Policy 1203 be rescinded.

Regents Policy 1203 eliminates the automatic conferral of *emerita/emeritus* status to retiring In-Residence and Clinical X faculty. At UCSF, In-Residence and Clinical X faculty make up the majority of faculty. In-Residence and Clinical X faculty make tremendous contributions to research, education, and service. Regents Policy 1203 diminishes their work, and automatic conferral of *emerita/emeritus* status should be reinstated for these faculty members.

Regents Policy 1203 provided that conferral of *emerita/emeritus* title suffix, upon retirement, would not be automatic for academic appointees other than Professors or Associate Professors. Then, the Academic Senate would make a recommendation to the President of the University or designee regarding the conferral of the *emerita/emeritus* title suffix on all academic appointees other than Professors or Associate Professors. The Regents passed Policy 1203 without complying with procedure.

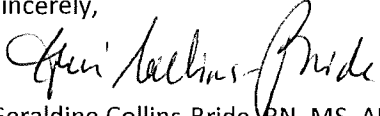
Had the Regents followed procedure, the President would have consult with both the Provost and the Chair and Vice Chair of the Academic Senate on proposed revisions to APMs after Academic Council had a meaningful opportunity to review the proposed revisions. Senate Chair Shane White sent the proposed revisions to Academic Council members at 8:23 p.m. the night before the Academic Council meeting on October 25, 2017. His email did not mention the removal of the automatic conferral of *emerita/emeritus* status for In-Residence and Clinical X faculty, and the attached copy of the policy did not show the insertions and deletions that changed the rule. It would have taken a careful line-by-line comparison to notice that the following sentence had been removed and replaced: "The title suffix Emeritus for positions held at the time of retirement shall be conferred, upon retirement, on every member of the Academic Senate."

If this change had been pointed out, or it had it at least been clearly marked, the negative effect on health sciences faculty could have been identified and addressed. Unfortunately, the inadequate opportunity for review led to a policy that devalues the contributions of faculty at UCSF and clinical faculty in particular. To correct this, the Clinical Affairs Committee advocates for rescinding Regents Policy 1203 and reinstating the automatic conferral of *emerita/emeritus* status on all members of the Academic Senate upon retirement.

Additionally, the Clinical Affairs Committee believes this issue is an example of how a standing systemwide committee on health sciences could help the University make more informed decisions. A standing committee would not only represent faculty with clinical responsibilities across campuses, but it would

enable the University to better understand and leverage the growing health science presence within the University.

Sincerely,

A handwritten signature in black ink, reading "Geraldine Collins-Bride". The signature is written in a cursive, flowing style.

Geraldine Collins-Bride, RN, MS, ANP-C, FAAN
Chair, Clinical Affairs Committee
UCSF Academic Senate
2019-2020

February 12, 2020

Professor Sharmila Majumdar, PhD
Chair, UCSF Academic Senate

RE: Systemwide Review of Proposed Revisions to APM 120 Related to *Emerita/Emeritus* Titles

Dear Chair Majumdar,

The Committee on Research understands that the passage of Regents Policy 1203 on Emerita/Emeritus Title Suffix was approved without having the complete benefit of a fully deliberative process within the Academic Council. We are now grateful for this systemwide review of APM 120 as it is the first instance in which the UCSF Senate Committee on Research has opportunity to comment on the impact that changing the policy on emerita/emertus titles would have on research faculty.

At UCSF, 352 members of the faculty have an appointment in the Ladder Rank series. In contrast, 556 members hold appointments in the In-Residence Series.

Most of the research faculty at UCSF – the top public recipient of NIH grants – are funded entirely without support from the California Budget. Indeed, in 2017-2018 state funds made up 2% of total combined revenue for UCSF while grants and contracts accounted for 21%. Many research faculty on “soft money” have an appointment in the Professor in Residence Series (APM-270) where titles “are assigned to academically qualified individuals who engage in teaching, research or other creative work, and University and public service to the same extent and at the same level of performance as those holding corresponding titles in the Professor series in the same department.”

Indeed, under the APM, promotion and advancement criteria of Ladder Rank and In-Residence faculty are identical. As reported to sponsors such as the NIH and foundations, UCSF classifies junior faculty with an appointment in either Ladder Rank or In-Residence series as equivalent for purposes of career development grants explicitly limited to “tenure track or equivalent” early career faculty. In accordance with principles of fairness, reliance, and consistency, emerita/emertus status, conferred at the culmination of one’s career, should be awarded equivalently for all Academic Senate series.

At UCSF, emerita/emertus benefits include space, when available, to continue scholarly or creative work. It is not uncommon for UCSF faculty with emerita/emertus titles to have space on campus and continue their research after retirement. Emerita/emertus faculty also retain access to the library’s resources and departmental meeting and voting rights, which are all benefits that can support the scholarly or creative work of research faculty and thereby continue to contribute to UC’s mission as a research university.

The elimination of automatic conferral of emerita/emertus status for all but the Ladder Rank series bifurcates the rights of Academic Senate faculty without appropriate justification. It will segregate faculty within the Senate into two different classes - those that are conferred automatically Emeritus status and those that will have to rely on local practices. At UCSF we believe in the equal treatment of faculty. Any policy change that creates inequity among Senate faculty sets a dangerous precedent that could impact other issues including but not limited to benefits.

The change in policy diminishes the important contributions of “soft money” research faculty in the Professor in Residence series. Moreover, it adds an unnecessary barrier for retired research faculty who would choose to continue their scholarly or creative work.

We note that, while our comment is primarily concerned with research faculty, we also object to the change as it relates to the Clinical X series and support the comments of the UCSF Academic Senate Clinical Affairs Committee. UCSF has 670 faculty in the Clinical X series. Clinical X faculty, who are prevalent on UC health sciences campuses, are also engaged in research and clinical service and are included in their respective Senate Divisions based on Systemwide Senate Bylaws.

Academic Senate Series	Number of Faculty Appointments	Percentage of Academic Senate Appointments
Ladder Rank	352	22%
In-Residence	556	35%
Clinical X	670	42%

All Academic Senate faculty should have equal rights upon retirement.

Sincerely,



Lea Tenenholz Grinberg, MD, PhD
Chair, Committee on Research
UCSF Academic Senate
2019-2020

February 12, 2020

Professor Sharmila Majumdar, PhD
Chair, UCSF Academic Senate

RE: Systemwide Review of Proposed Revisions to APM 120 Related to *Emerita/Emeritus* Titles

Dear Chair Majumdar,

The Provost's cover letter notes that the "previous Appendix A documents relating to space resource allocation are proposed for rescission, as the key principles of the documents have been incorporated into the policy text in APM - 120-80-d."

According to APM – 120-80-d:

"The University is eager to support the activities of Emerita/Emeritus/Emer. faculty and to help assure that they continue to contribute actively to the intellectual enrichment of the campuses. To this end, yet recognizing office and laboratory space shortages and campus resource limitations, the needs of productive Emerita/Emeritus/Emer. faculty should be carefully considered in the allocation of available space resources on each campus, per local campus procedures."

Appendix A includes two UCOP notices: one from 1954, and another from 1991.

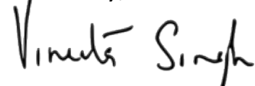
The 1954 UCOP document states, "the University will provide space, when available, to emeritus professors who need space to continue their scholarly or creative work... The provision of such space shall not imply any claim upon a departmental budget... Professors who wish space assigned to them as emeritus professors should formally request it prior to their retirement, stating the purpose for which it is to be used."

The 1991 UCOP document replaced the one from 1954, with language echoed in APM – 120-80-d.

Even if space is not guaranteed, having a right to request space from the University is, in and of itself, a benefit of Emerita/Emeritus/Emer. status.

We believe those rights should extend to all Academic Senate faculty, and not only those in the Ladder Rank series.

Sincerely,



Vineeta Singh, MD
Chair, Committee on Space
UCSF Academic Senate
2019-2020

Committee on Academic Planning & Budget

Paul Volberding, MD, Chair

February 12, 2020

TO: Sharmila Majumdar, Chair, UCSF Academic Senate

FROM: Paul Volberding, Chair, Academic Planning and Budget Committee

RE: Systemwide Review of Proposed Revisions to APM 120 Related to
Emerita/Emeritus Titles

Dear Chair Majumdar,

The Academic Planning and Budget Committee wishes to express its opposition to the passage of Regents Policy 1203, which functionally eliminated the automatic conferral of *emerita/emeritus* status to retiring In-Residence and Clinical X faculty.

Regents Policy 1203 stipulates that conferral of *emerita/emeritus* title suffix, upon retirement, would no longer be automatic for academic appointees other than Professors or Associate Professors. This fundamentally revises the long-standing APM 120, which affirmed that “*the title suffix Emeritus for positions held at the time of retirement shall be conferred, upon retirement, on every member of the Academic Senate.*” Indeed, this language was previously mirrored in Standing Order 103.5(a).

It bears noting that ladder rank faculty generally represent a minority of the faculty at UC Health Science campuses. For example, at UCSF, In-Residence and Clinical X faculty make up the majority of faculty. Moreover, most Senate faculty are members of the In-Residence and Clinical X series. In-Residence and Clinical X faculty make tremendous contributions to research, education, and service. Unfortunately, Regents Policy 1203 serves to undermine their value and diminish their work. Although bestowal of the Emeritus status is still possible under the proposed new APM 120, it would now require a separate process, which is burdensome on both the Administration and Senate CAP committees, and may introduce inequitable treatment of faculty in the six campuses with healthcare enterprises.

Additionally, we believe this policy was passed in violation of the proper review process. Per policy, the President consults with both the Provost and the Chair and Vice Chair of the Academic Senate on such APMs. However, the proposed revisions were not communicated to the Academic Council until the night before the Academic Council met on this issue. Moreover, the communication did not specify the revised language or clarify the proposed rule change, specifically the removal of the automatic conferral of *emerita/emeritus* status for In-Residence and Clinical X faculty. Had these changes been properly communicated, or at least been clearly marked, the negative effect on health sciences faculty could have been identified and addressed.

Unfortunately, the inadequate opportunity for review led to a policy that devalues the contributions of faculty at UCSF and clinical faculty in particular.

For the above reasons, the Academic Planning & Budget Committee advocates rescinding Regents Policy 1203 and reinstating the automatic conferral of *emerita/emeritus* status on all members of the Academic Senate upon retirement.



OFFICE OF THE ACADEMIC SENATE

9500 GILMAN DRIVE
LA JOLLA, CALIFORNIA 92093-0002
TELEPHONE: (858) 534-364
FAX: (858) 534-4528

January 31, 2020

Professor Kum-Kum Bhavnani
Chair, Academic Senate
University of California
1111 Franklin Street, 12th Floor
Oakland, CA 94607

Re: Proposed Revisions to APM 120, Emeriti

Dear Professor Bhavnani:

The proposed revisions to APM 120, Emeriti were circulated to standing Senate committees for review. Responses were received from the Divisional committees on Academic Personnel (CAP), Faculty Welfare (CFW), and Privilege and Tenure (CPT) and the proposed revisions and committee responses were discussed at the Divisional Senate Council meeting on January 27, 2020. Due to concerns that the proposed revisions will undermine equity amongst the ranks of faculty, Senate Council unanimously opposed the revisions to APM 120, Emeriti.

Sincerely,

A handwritten signature in dark ink, appearing to read "Maripat Corr", is written over a light blue horizontal line.

Maripat Corr, Chair
San Diego Divisional Academic Senate

Cc: Steven Constable, Vice Chair, San Diego Divisional Academic Senate
Ray Rodriguez, Director, San Diego Divisional Academic Senate
Hilary Baxter, Executive Director, Systemwide Academic Senate

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<http://www.senate.ucsb.edu>

Henning Bohn, Chair
Debra Blake, Executive Director

February 18, 2020

To: Kum-Kum Bhavnani, Chair
Academic Council

From: Henning Bohn, Chair
Academic Senate

A handwritten signature in cursive script, reading "Henning Bohn".

Re: Systemwide Review of Proposed Revisions to APM 120 Emerita-Emeritus Titles

The Santa Barbara Division delegated review of the proposed revisions to APM 120, Emerita-Emeritus Titles, to its Council on Faculty Welfare, Academic Freedom and Awards (CFW) and its Committee on Academic Personnel (CAP). CFW endorsed the proposed revisions with no reservations, and CAP chose not to opine.

December 18, 2019

Kum-Kum Bhavnani, Chair
Academic Council

Re: Systemwide Review of Proposed Revisions to Academic Personnel Manual (APM), Section 120, Emerita/Emeritus Titles (APM – 120)

Dear Kum-Kum,

The Santa Cruz Division has reviewed and discussed the proposed revisions to the Academic Personnel Manual (APM), Section 120 regarding Emerita/Emeritus Titles. Our Committees on Affirmative Action and Diversity (CAAD), Academic Personnel (CAP), Emeriti Relations (CER), and Faculty Welfare (CFW) have responded. We understand that the proposed revisions are, in part, meant to incorporate the language and provisions of Regents Policy 1203: Policy on Emerita/Emeritus Title Suffix (enacted in May 2018) and to ensure that there is no conflict between Regents Policy and the APM. Responding committees praise the addition of a gender-inclusive title, raise concerns regarding the lack of reference to disqualifying criteria for conferral of the title for Professors and Associate Professors, and provide several additional recommendations for improvements as noted below as well as in the attached responses.

Both CAAD and CAP express appreciation for the addition of the gender-inclusive “Emer.” title. CAAD, however, notes that the period implies that a specific word has been truncated, when, in actuality, the term is intended as an alternative to two existing gender-specific terms and is not a truncation of either of them. The committee recommends removing the period and using the term “Emer.” CAP further points out that the third alternative was inconsistently included throughout the proposed revised policy.

CAAD also points out that the language used to refer to broad classes of academic appointees is often convoluted: “Member of the Academic Senate with an academic title other than Professor or Associate Professor”; “An academic appointee who holds a non-Senate position at the time of retirement and who is not a member of the Academic Senate.” Members were left to question what titles would fall into these classes and suggest including examples.

Most significantly, CAAD notes that some aspects of the proposed revisions appear to undercut the ethos of inclusivity established by recent revisions to APM 210-3 regarding the Lecturer with Security of Employment (LSOE) Series, which went into effect on October 1, 2018. Those changes align the LSOE series closely with the ladder rank Professor series. The committee calls attention to the fact that the proposed revision to APM 120 is less inclusive of Senators who are not members of the Professor series, including LSOEs. Instead of automatic conferral of the Emerita/Emeritus/Emer title on all Senators (or at least on all Professors, including Teaching Professors/LSOEs), the proposed language has been revised to be more exclusive, with the title being a matter for local determination (APM 120-10.b, October 2019, 2) rather than assigned by default. CAAD questions whether Chancellor authority and recommendation of the Academic Senate should be necessary to establish Emerita/Emeritus/Emer status for non-Professor series members of the Senate, particularly for LSOE Teaching Professor titles if the overall intention of revisions to the LSOE series was to bring it into greater alignment with ladder rank Professors.

For non-tenured Senate members and non-Senate members, CER notes that Emer status requires the action of at least a nomination and decision by the Chancellor; however, the committee is not aware of a process by which this happens and to the committee’s knowledge, the APM does not contain specific guidelines. CER recommends that such guidelines, or a delegation to campuses, be included in the APM.

All responding committees note that the proposed policy treats Academic Senate members who retire with tenure (Professors and Associate Professors) differently from other eligible retirees (i.e., non-tenured Academic Senate members and non-Senate members). Namely, Emer status is said to be automatically conferred on the first group (120-0.1 and 120-10.a), while in the case of the other two groups, Emer status is not automatic. As such, no criteria are specified for conferring Emer status on the first group, while criteria are listed for the other groups. However, APM 016, Section II-5 states that the President has the authority to deny Emer status to a future retiree as part of a disciplinary action, so it is not automatically conferred in every case. We recommend that this issue be clarified by linking 120-80.a to APM 016, II-5.

Responding committees similarly point out that the proposed revised policy outlines occurrences that would disqualify non-Senate and members of the Academic Senate with a title other than Professor or Associate Professor from the conferral of the title, but does not list such occurrences for Professors/Associate Professors, although they do exist. For consistency, equity, and improved transparency, the Santa Cruz Division recommends that revised APM 120-10.a reference the situations in which curtailment is permitted in APM 015 – The Faculty Code of Conduct (APM 015.III.A.5), and that revised APM 120-24-Authority include reference the authority for the curtailment of Emerita/Emeritus/Emer status for a member of the Academic Senate with a title other than Professor or Associate Professor resting with the President on recommendation of the Chancellor (APM – 106.II.5). Once APM 015 and 016 are referenced in the policy, CAP recommends that 120-10.b(2) and 120-10.c(4) be removed, as all members of the Academic Senate are covered by APM 015 and 016, and there is a mechanism for proactively denying Emer status when warranted after a fair decision making process with appropriate safeguards against arbitrary or unjust disciplinary actions.

CER is especially pleased to see that the revised policy adds a paragraph about office and lab space for Emeriti (120-80.d) and notes that the addition replaces two communications from previous UC Presidents, which are currently incorporated as an appendix to APM 120. However, the committee regrets the omission of the strong language in President Gardiner’s communication, which acknowledges that some of the University’s most eminent scholars are recent or soon to be retirees; that some continue to make major contributions to their fields; and that many may participate actively in various university activities. The committee would like to see this language restored in order to strengthen the rationale for providing office and lab space to Emer faculty, even if the conferral of this space remains discretionary.

In terms of editorial notes, CER points out that there is some inconsistency in 120-80 with the use of terms *nominee* and *appointee*. In b(3), *nominee* has been replaced by *appointee*, but the same change was not made in c(3). Thank you for the opportunity to review these policy revisions.

Sincerely,



Kimberly Lau, Chair
Academic Senate
Santa Cruz Division

cc: Jessica Taft, Chair, Committee on Academic Freedom
Elizabeth Abrams, Chair, Committee on Affirmative Action and Diversity
Paul Roth, Chair, Committee on Research



UNIVERSITY COMMITTEE ON FACULTY WELFARE (UCFW)
Jean-Daniel Saphores, Chair
saphores@uci.edu

Assembly of the Academic Senate
1111 Franklin Street, 12th
Oakland, CA 94607-5200
Phone: (510) 987-9466
Fax: (510) 763-0309

February 20, 2020

**KUM-KUM BHAVNANI, CHAIR
ACADEMIC COUNCIL**

RE: Proposed Revisions to APM 120 related to Emerita/Emeritus Titles

Dear Kum-Kum,

The University Committee on Faculty Welfare (UCFW) has reviewed the proposed revisions to APM 120 related to Emerita/Emeritus titles. We find several concerns that should be brought to your attention.

REGENTS POLICY 1203 AND REVISIONS TO APM 120 RE EMERITA/EMERITUS TITLE SUFFIX

Revisions to APM 120 (Emerita/Emeritus Titles) were proposed to reconcile with new Regents Policy (RP) 1203: Policy on Emerita/Emeritus Title Suffix. This RP 1203 replaced the rescinded Standing Order (SO) 103.5. There are two main areas for UCFW's focus. One concerns the revisions to APM 120, reasonably initiated to conform to the new Regental policy. Those concerns (in response to the Systemwide Review) are considered second below.

The second concern is more primary, and that is the changes in RP 1203 that eliminate the automatic conferral of the Emerita/Emeritus Title Suffix to Academic Senate members on retirement with titles other than those of ladder-rank Professor and Associate Professor. This second concern is presented first, as this concern provides context for comments on revised APM 120.

CHANGES IN REGENTS POLICY 1203

Rescinding Regental SO 103.5 and implementation of RP 1203: Apparently in an effort to clarify language and policy, the Regents rescinded SO 103.5 and approved RP 1203. In so doing, they eliminated some Academic Senate members from automatically receiving the Emerita/Emeritus/Emer honorific suffix upon retirement. Many constituencies are responding to this new policy, which was voted upon and accepted in May 2018 with the support of the Academic Council. A comparison of wording regarding Academic Senate faculty between the old and new policies is presented here:

- SO 103.5:
"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.” This section is quoted under Policy in APM 120-0 of 1/14/05. APM 120-10 of 1/14/05 says further under Criteria, “There are no special criteria for conferral of Emeritus status upon academic appointees who are members of the Academic Senate since such status is granted automatically upon retirement.”

- RP 1203:

“1. The title suffix Emerita/Emeritus shall be conferred, upon retirement, on every Professor and Associate Professor.

2. Upon recommendation of the Academic Senate to the President of the University or designee, the title suffix Emerita/Emeritus for positions held at the time of retirement may be conferred, upon retirement, on those members of the Academic Senate who are not included in section (C) (1). [Limits automatic award to ‘Professor or Associate Professor]

3. Upon recommendation of the Academic Senate to the President of the University or designee, the title suffix Emerita/Emeritus may be conferred, upon retirement, on other academic appointees who are not members of the Academic Senate but who meet specific criteria established by the President.”

- And revised APM 120-10 Criteria proposes:

“a. Professor or Associate Professor - There are no special criteria for conferral of the title suffix Emerita/Emeritus/Emer, upon every Professor and Associate Professor since the title suffix is conferred automatically upon retirement.

b. Members of the Academic Senate with an academic title other than Professor or Associate Professor - Upon recommendation of the Academic Senate, the title suffix Emerita/Emeritus/Emer for academic positions held at the time of retirement may be conferred on those members of the Academic Senate who do not hold the title of Professor or Associate Professor at the time of retirement. In these cases, the appointee shall be judged by the following criteria: (1) evidence of noteworthy and meritorious contributions to the education mission and programs of the University as determined by local procedures; and (2) lack of serious breaches of policy or law, dismissal from the University, or serious discipline while holding the position for which the Emerita/Emeritus/Emer title is requested. Such occurrences disqualify the appointee from conferral of the title.”

(There is also a 3rd section devoted to Non-Senate academic appointees that will fall under the comments focusing on revised APM 120, but not comments about the changed Regents policy under discussion here.)

Although these changes were supported by the Academic Council, there seems to have been a misunderstanding of the change when Council approved it in October 2017. The minutes from this meeting contains the erroneous assertion that automatic conferral of Emerita/us status only to ladder-rank faculty ALREADY was in place at the time of this meeting; however, such status at that time was conferred to ALL Academic Senate retirees.

The Regents themselves may have been more concerned about title conferral on Non-Senate Academics and the variability among Campuses (and with the Regents themselves) in criteria used for such conferral. Academic Council also was concerned about Campus variability in title conferral for Non-Senate Academics in particular.

The new RP 1203 does clear up many items that are reflected in the revised APM 120, and those are included below in comments on the revised APM 120. However, this policy change requiring Academic Senate members who are not ladder-rank (e.g., Professor of Clinical X, Professor in Residence, Lecturers with Security of Employment, and some others) to no longer have automatic Emerita/Emeritus/Emer title suffix itself inserts additional variability in the process. This policy change also seems to reflect a diminution of respect for these individuals. These Senate members are all subject to rigorous merit-based reviews prior to promotion and are some of the most valued teachers, researchers and campus service participants on all the Campuses. They have already shown “evidence of noteworthy and meritorious contributions to the education mission and programs of the University as determined by local procedures.” There seems little logic in now having additional processes, procedures and hoops for their being accorded what is solely an honorific and deserved title.

Therefore, UCFW respectfully requests that the Academic Council request that the Regents return to the original policy language of SO 103.5. That is, members of the Academic Senate in good standing who retire with an Academic Senate title be automatically accorded the title suffix Emerita/Emeritus/Emer.

REVISIONS TO APM 120 IN RESPONSE TO RP 1203

As mentioned above, it is hoped that the Academic Council would consider asking the Regents to resume the “status quo ante” for Academic Senate retirees in Regental policy prior to May 2018. This revision by the Regents would lead to extensive additional wording changes in any re-revised APM 120.

In the meantime, and in correspondence with other elements of RP 1203, the revised APM 120 includes the possibility of selecting a gender inclusive title suffix, Emer, on retirement (revised APM 120-0). While this reader finds that “abbreviation” very unsatisfactory, the attempt to replace the ancient Latin with a term that acknowledges gender inclusive title preferences among individuals is commendable.

Retiring Non-tenured Academic Senate members now would be subject to “local campus policies and procedures” to acquire the title suffix. The first section of this overall response explains how that would lead to even more variable criteria and selection between campuses, whereas all these merit-based titles already have “evidence of noteworthy and meritorious contributions to the education mission and programs of the University as determined by local procedures.” There is no cost to the Campus or the University were the titles to continue to be conferred automatically; there likely would be increased costs and delays to administer additional reviews.

There would be criteria for DISQUALIFICATION (revised APM 120-10) of non-tenured Senate faculty retirees and non-Senate appointees, but not for ladder-rank Professor and Associate Professor retirees. These disqualification criteria should apply across the board. Indeed, one of Academic Council’s reasons for approving its ability to intervene in conferring the honorific Emerita/Emeriti/Emer titles to these non-Senate members was to avoid individuals who show “...serious breaches of policy or law, dismissal from the University, or serious discipline while holding the position for which the Emerita/Emeritus/Emer title is requested. Such occurrences disqualify the appointee from conferral of the title.” Tenured faculty should be subjected to the same criteria.

Deans and Faculty Administrators, curiously, in the revised APM 120-10-e are now not conferred the honorific titles automatically, even though many of these individuals have to be tenured faculty to become Deans and Faculty Administrators. Even with the new administrative title, they do not relinquish their tenured positions, unless they resign them. This section may require more clarification for the benefit of the individuals and the Campuses from which they retire, and not just indicating that they must hold the proper Academic Senate title upon retirement.

No problem is seen in the clarification that the Curtailment decision process (revised APM 120-24) (based on violations of APM 016) rests with the President upon recommendation of the Chancellor, for faculty (tenured, non-tenured Senate, and non-Senate). For non-faculty academic appointees, the Chancellor or the Vice President-Agriculture and Natural Resources makes the decision. There is no clarity on criteria, but in the latter case, the lack of criteria provides flexibility but caution must be had on the seriousness of such a Curtailment decision.

It is gratifying to see, as a matter of policy rather than an Appendix, the encouragement to provide office or lab space for Emerita/Emeritus/Emer, as appropriate on each Campus and on the activities of each individual after retirement.

Sincerely,

Jean-Daniel Saphores, UCFW Chair

Copy: UCFW
Hilary Baxter, Executive Director, Academic Senate



UNIVERSITY COMMITTEE ON PLANNING AND BUDGET (UCPB)
Sean Malloy, Chair
jsteintr@uci.edu

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February 20, 2020

**KUM-KUM BHAVNANI, CHAIR
ACADEMIC COUNCIL**

RE: Proposed Revisions to APM 120

Dear Kum-Kum,

The University Committee on Planning and Budget (UCPB) has discussed the proposed revisions to APM 120 (Emerita/Emeritus Titles). We understand that the revisions are intended to conform with changes to Regents Policy 1203 (Policy on Emerita/Emeritus Title Suffix) made during a realignment of Regents Standing Orders in 2018. While the original impetus for those revisions appears to have been a desire to clarify provisions for the conferral of Emerita/Emeritus status on non-academic employees, they would also limit automatic conferral of those titles to tenured, ladder-rank Senate faculty with the titles professor and associate professor.

UCPB supports several aspects of the revised policy, including the addition of the gender-inclusive title suffix "Emer.", but does not support the new limitation on Emerita/Emeritus/Emer. status. In the past, all Senate members automatically received Emerita/Emeritus/Emer. status; however, under the revised policy, Health Sciences titles such as "in Residence" and "Clinical X" – along with Lecturers with Security of Employment and Teaching Professors – would be excluded from this automatic recognition. Given that faculty in these titles make important contributions to research, teaching, and service, they deserve to have access to automatic Emerita/Emeritus/Emer. status. While the policy permits campuses to develop local criteria and procedures for conferring Emerita/Emeritus/Emer. status, this work-around adds an unnecessary administrative burden that would disproportionately affect divisions with medical centers.

UCPB strongly recommends against this change.

Sincerely,

A handwritten signature in black ink, appearing to be "Sean Malloy".

Sean Malloy, Chair
UCPB

Encl.

cc: UCPB



UNIVERSITY COMMITTEE ON ACADEMIC FREEDOM (UCAF)
Sarah Schneewind, Chair
sschneewind@ucsd.edu

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November 12, 2019

**KUM-KUM BHAVNANI, CHAIR
ACADEMIC SENATE**

RE: PROPOSED REVISED APM - 120, EMERITA/EMERITUS TITLES

Dear Professor Bhavnani,

UCAF has reviewed the proposed revised APM 120 and we have one comment on section 120-10, Criteria.

Subsections 120-10 B 1 and 120 -10 C 3 include the phrase “evidence of noteworthy and meritorious contributions to the educational mission and programs of the University as determined by local procedures...” UCAF recommends that “local procedures” for deciding on the merit of work should be clarified. The policy should specify that faculty members (for instance, the local CAP) are deciding, not administrators or staff. For cases involving non-faculty decisions should be made by appropriate professional peers, again, not administrators or staff.

UCAF appreciates the opportunity to comment on this matter. Please feel free to contact me with any questions.

Sincerely,

Sarah Schneewind

Sarah Schneewind, Chair
UCAF



UNIVERSITY COMMITTEE ON ACADEMIC PERSONNEL (UCAP)
John Gilbert, Chair
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January 21, 2020

KUM-KUM BHAVNANI, CHAIR
ACADEMIC COUNCIL

RE: PROPOSED REVISED APM - 120, EMERITA/EMERITUS TITLES

Dear Kum-Kum,

UCAP reviewed the proposed revisions APM 120 during our meeting on January 8th. The committee unanimously supports the revisions designed to make the language used to refer to Emeriti gender neutral. This aligns with the University's larger expressed commitment to diversity, equity, and inclusion.

At the same time, however, we are also unanimous in our concerns about the decision to exclude our colleagues in the Teaching Professor series from automatically becoming recognized as Emer. upon their retirement. This strikes us as at odds with a basic commitment to inclusivity, in this case the inclusion of our Senate colleagues who have served the university well as Teaching Professors (i.e., LPSOEs and LSOEs).

As the Chair of UCAP, I applaud the inclusive language and respectfully ask that the exclusion of Teaching Professor be reconsidered. Thank you for the opportunity to comment on this matter. Please don't hesitate to contact me if you have any questions.

Sincerely,

A handwritten signature in cursive script that reads "John R. Gilbert".

John Gilbert, Chair
UCAP

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SANTA BARBARA • SANTA CRUZ

UNIVERSITY COMMITTEE ON AFFIRMATIVE ACTION, DIVERSITY,
AND EQUITY (UCAADE)
Mona Lynch, Chair
lynchm@uci.edu

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February 19, 2020

**KUM-KUM BHAVNANI, CHAIR
ACADEMIC COUNCIL**

**Re: UCAADE's Comments on the Proposed Revisions to Academic Personnel Manual
(APM), Section 120, Emerita/Emeritus Titles**

Dear Kum-Kum,

I am writing on behalf of the University Committee on Affirmative Action, Diversity, and Equity (UCAADE) to express the committee's support for the proposed changes to the titles that aim to be more gender inclusive.

Our committee does not have any specific recommendations as to the title revisions, but we wholeheartedly endorse the effort to ensure that all in the UC community are able to feel and be recognized, including in the title options for emeriti.

Sincerely,

A handwritten signature in black ink, appearing to read "Mona Lynch", is written over a light gray rectangular background.

Mona Lynch
Chair, UCAADE

UNIVERSITY OF CALIFORNIA, ACADEMIC SENATE

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SANTA BARBARA • SANTA CRUZ

Nicholas Webster
Chair, University Committee on Privilege and Tenure
Email: nwebster@ucsd.edu

Academic Senate
University of California
1111 Franklin Street, 12th Floor
Oakland, California 94607-5200

February 21, 2020

KUM-KUM BHAVNANI, ACADEMIC COUNCIL CHAIR

Re: Proposed Revised APM 120, Emerita/Emeritus Titles

Dear Chair Bhavnani,

I am responding on behalf of the members of the Committee on Privilege and Tenure, who discussed the proposed changes to APM-120 at their November 2019 meeting.

We have no comment on the introduction of the optional spelling 'Emer.'.

Regents Policy 1203 requires some changes to APM 120. The parts that concern us are the ones concerning the conferral of emeritus status upon academic appointees other than Professors and Associate Professors. These come in two kinds: Regents Policy 1203.C.2 permits conferral of emeritus status on members of the Academic Senate who are not Professors or Associate Professors. 1203.C.3 permits conferral of emeritus status on academic appointees who are not members of the academic senate.

The first seems fairly reasonable, though we are a bit concerned that the proposed revision to APM 120 does not specify any systemwide policy regarding qualifications for the honor. It might be better to just include all members of the Academic Senate automatically.

Section C.3, which concerns conferring the emeritus title on academic appointees who are not members of the Academic Senate, raises some concerns. The main ones are the vagueness of the criteria for conferral of the title and the vagueness of the process.

On the criteria for conferral of the title, section C.3 only says "the title suffix Emerita/Emeritus may be conferred, upon retirement, on other academic appointees who are not members of the Academic Senate, but who meet specific criteria established by the President". So far as we know, those specific criteria have not been established, so it is hard for us to opine whether this is a good policy or not.

Regarding process, we see the language: "Upon recommendation of the Academic senate to the President of the University or designee, the title suffix Emerita/Emeritus for positions held at the time of retirement may be conferred ...". This language does not specify what organ of the Academic Senate will be charged with initiating or carrying out the necessary action. This seems to us to be a serious gap in the plan for implementation of the policy. (The same gap also exists in the language of section C.2.)

Until these problems in the proposed policy are addressed, we vigorously suggest that the policy as written should not be adopted.

Sincerely,

A handwritten signature in black ink that reads "Nicholas Webster". The signature is fluid and cursive, with a long horizontal stroke at the end.

Nicholas Webster
Chair, UCPT

cc: Mary Gauvain, Academic Council Vice Chair
UCPT Members
Hilary Baxter, Academic Senate Executive Director
Michael LaBriola, Academic Senate Assistant Director