

Temporary Policy for Faculty Retiring in 2021

As we seek to find all means possible to accommodate colleagues in the light of the COVID-19 disruption, we offer the following retirement policies, which include adjustments specifically for those Senate faculty members (hereafter, “faculty”) planning to retire effective January 1 or July 1, 2021. To be eligible for any of these policies, faculty must sign a Pathway to Retirement Agreement.

There are three rationales for offering this temporary adjustment.

- First, faculty members nearing retirement may feel especially vulnerable to the virus and would benefit from greater flexibility as to how to structure their work both pre- and postretirement.
- Second, the campus does not want to lose the expertise of late career faculty and thus wants to offer expanded ways of continued engagement.
- Third, if faculty members are able to continue to offer their analytical and creative capabilities as an emeritus/a in a flexible arrangement, this would help to alleviate some of the extreme budget pressures.

Provisions before retirement

A Pathway to Retirement Agreement is designed to support the specific transitional needs and interests of the individual faculty member who has decided to separate within one or two years’ time. There are separate Agreement forms for ladder faculty and for Teaching Professors (LSOE). The types of provisions include changes in teaching and service assignments. For those retiring July 1, 2021, the campus will make those terms more generous.

- Ladder faculty members retiring July 1, 2021 may request to be relieved of all teaching and service obligations in their final semester to complete research projects. (The current provisions allow for reduced teaching or service, but do not permit completely forgoing all teaching and service in the final semester.)
- Teaching professors (LSOE) members retiring July 1, 2021 may request reduced service in the final semester.

Provisions after retirement

A Pathway to Retirement Agreement often includes provisions for one or two years after retirement specific to the needs of the faculty member who has decided to retire. Faculty members design a plan for a smooth transition from pre-retirement activities to postretirement activities with their chair/dean. Provisions for those retiring in 2021 will allow for the following:

For ladder faculty:

- Continued use of office and research space for up to three years, subject to departmental/decanal approval. (The current provision is for one year.)

- Increased payment for recall teaching to \$5,000 per credit hour for up to four courses. (The current provision is for up to \$4,000 per credit hour with a limit of two courses.) The teaching must meet the 2018 guidelines and fall under the rules of those guidelines. Please see <https://ofew.berkeley.edu/welfare/retirement/central-funding-recall-appointments>.
- Recall for research at a rate of \$6,000 per year for three years. (This provision is not otherwise offered. The funding can be augmented up to 43% of the faculty member's annualized academic year salary with grant funding or funding a faculty member has retained in their research accounts.)
- Replacement of BEAR funding up to a cap of \$10,000. (The current provision has a cap of \$8,000.)
- For endowed chair holders: a top-up to \$25,000 of permitted endowed chair carryforwards below \$25,000. Please note that emeriti retain nearly all the benefits of an active faculty member.

For Teaching Professors (LSOE):

- Continued use of office space for up to three years, subject to departmental/decanal approval.
- Increased payment for recall teaching up to \$5,000 per credit hour for up to four courses. The teaching must meet the 2018 guidelines and fall under the rules of those guidelines. Please see <https://ofew.berkeley.edu/welfare/retirement/central-funding-recall-appointments>.

Emeriti Academy

The UC Berkeley Emeriti Academy will provide a support structure and space to facilitate the engagement of emeriti to work on interdisciplinary collaborative projects. This effort strives to allow emeriti to continue to contribute their analytical and creative capabilities in new ways on projects of importance to the campus and broader community.

- Emeriti who participate in the Academy on collaborative efforts will be honored as Professor of the Academy. Space to meet with collaborators and administrative support will be provided.
- Ladder faculty who continue to do their own research and mentor graduate students may be honored with the title of Professor of the Graduate School. The process for requesting this status may be found here: <https://ofew.berkeley.edu/welfare/retirement/professor-graduate-school>.