

*Senior and Emeriti Faculty at Brandeis
Report and Recommendations*

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Senior and Emeriti Faculty: Executive Summary

Recent decades have seen significant increases in the median age of university faculty as well as an increase in active emeriti. Institutions across the United States have developed innovative programs, projects, and policies that engage retired faculty in diverse aspects of the institutional mission, aid senior faculty in the transition to retirement, and recognize the range of contributions that emeriti can make to university research, teaching, and service especially at a time of limited institutional expansion.

Brandeis has lagged behind the curve of innovation even though 46% of full-time tenured Brandeis faculty are over 60 and a large percentage of our emeriti remain active in research or creative work. The findings of our task force confirm the importance of programs and policies that (a) facilitate the transition to retirement, (b) support the continuing contributions of emeriti to their academic field, and (c) encourage emeriti participation as valued members of the university community. The status quo is not a viable alternative either for our faculty or for the institution as a whole.

Currently, few rights and benefits are explicitly accorded to emeriti: email, parking, library and athletic privileges, theater and concert tickets, inclusion in the Faculty Guide, and the right to non-voting participation in faculty meetings. The university has no official retirement policy or incentive plan, and there is no emeriti organization or even a mailing list. The Task Force recommends expanding current practices to include the following opportunities, benefits, and policies:

1. the same access as non-retired faculty members to university facilities, services, discounts and tickets, tuition reductions, and participation in university-wide events;
2. continued inclusion in relevant university and department websites, listservs, and mailings;
3. an all-campus (gold) parking pass;
4. retention of previous title with *emeritus/a* appended;
5. medical and dental benefits at the best level the university can offer;
6. continued support of research through office or lab space where feasible, access to departmental equipment and supplies, funds for travel to conferences, and eligibility for internal research grants;
7. recognition for professional and research accomplishments and opportunities to present research;
8. opportunities for mentoring, advising, and teaching as appropriate to university/department needs;
9. support for establishing and sustaining a Society of Brandeis Emeriti and a related website;
10. a formal role in faculty leadership, including an emeritus position on the Faculty Senate; representation on the University Advisory Council, and appointment to relevant committees;
11. a flexible approach to faculty workload in the late-career years, independent of retirement arrangements;
12. a public and transparent policy for transition to retirement that includes the possibilities of reduced teaching and leave time during the final years and addresses the need for university benefits;
13. active commitment to preserving the history of Brandeis faculty and the legacies of emeriti.

Report of the Task Force on Senior and Emeriti Faculty
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I. Background

Twenty years ago (in 1994), the Age Discrimination Act ended mandatory retirement restrictions for tenured faculty in United States universities. Thus began a dramatic generational sea change: the numbers of professors retiring by age 72 dropped from about 90% to about 30%, a level that has remained. In addition to the changed legal picture, increased longevity, decreased economic security, and the tightening of university budgets have together contributed to a dramatic shift in the age of the tenured professoriate. These shifts have also created a sizeable cohort of faculty in their late 60s, 70s, and early 80s who are nearing retirement or have recently retired, many of whom remain active as scholars and want to continue participating in various aspects of academic life.

In response to these changes, colleges and universities across the United States have developed innovative programs, projects, and policies that address the varied needs of senior and emeriti faculty, providing opportunities and benefits that allow faculty to remain active members of the university community during and after retirement. These initiatives have engaged emeriti in diverse aspects of the institutional mission, have aided them in the transition to retirement, and have recognized the range of contributions they might make in supporting the university's teaching, advising, administrative, and/or research commitments especially at a time of limited institutional expansion. The [American Council on Education](#) has recognized a group of innovative programs, and others have been identified by [Change Magazine](#). Research universities including such members of the Association of American Universities as Brown, Columbia, Cornell, Emory, Hopkins, Princeton, Stanford, USC, and Yale, and liberal arts colleges such as Bryn Mawr, Mount Holyoke, Wellesley, and Wesleyan are among institutions with active, broad-based emeriti policies, associations, and benefits.

Brandeis has lagged behind this curve; as of fall 2013 we had not yet engaged in these innovative conversations or reforms; when we look at the practices elsewhere, Brandeis does less for its emeriti faculty than nearly any institution we surveyed. Yet our university is no exception to the demographic trends; currently a full 46% of the full-time, tenured Brandeis faculty, and 49% of all faculty, are over 60. Many of these faculty will be retiring during the next decade or so, and yet there has been no university-wide discussion or shift in policies or practices. We have over 120 retired faculty, a good number of whom are research active and who benefit the university's academic reputation.

Despite the significant numbers of retired faculty, our emeriti are almost invisible in the day-to-day life of the university. Their access to departmental and university services, funds, and facilities is widely variable, even idiosyncratic. There are no formal mechanisms for involving emeriti in mentoring students and faculty, in departmental life, in professional conversations, in faculty governance, or even in associating with one another, and the research of emeriti is unevenly recognized and supported. Our retirement policies are invisible and retirement "deals" *ad hoc* and confidential; retirement benefits--both financial and communal--are extremely limited; and there is no institutional discussion of the ways in which late-career faculty might shift gears, change the nature or level their academic contributions, serve in new capacities, or pull back gradually from full-time involvement in teaching, scholarship, and/or service. There is not even a mailing list of emeriti faculty through which they can contact one another, and many have lost the comradeship of colleagues even in their own departments, along with a sense of place and intellectual community, at

the university where they served for decades as distinguished teachers, scholars, and university leaders. More importantly for the institution, the research capacities, mentoring and advising potential, accumulated wisdom, and intellectual riches of emeriti faculty are unavailable to the community as a whole. This invisibility creates a vacuum, rather than a welcoming new identity, for senior faculty contemplating retirement. The consequences of our failure to be proactive in addressing the needs of our senior and emeriti faculty or the needs of our institution vis-à-vis those faculty are, we believe, significant in terms of both financial costs and opportunity costs to the university as a whole.

Our 2013 Strategic Plan does recognize the need to address the issue of senior and emeriti faculty. It enjoins the university to “ensure that emeriti faculty are encouraged to stay engaged as active and valued members of the community” (p. 40). It calls on the university to “carefully explore and assess options for reduction from full-time status prior to retirement,” to “ensure that emeritus faculty are encouraged to take an active role in the life of the university,” and to recognize retired faculty members “for their continuing accomplishments as scholars, mentors, and public intellectuals” (p. 35). It also calls for Brandeis to be a lifelong learning community for its alumni (p. 39), and surely emeriti are, in an important sense, alumni of the university whose achievements have shaped and continue to shape our public identity.

II. Work of the Task Force

In keeping with the mandate of the Strategic Plan, Provost Goldstein, in consultation with the Faculty Senate, appointed in December 2013 a Task Force on Senior and Emeriti Faculty. The Task Force was charged with identifying best practices at other institutions; gathering information from Brandeis departments and from current emeriti faculty in order to understand the range of opportunities and needs that the university might put into place, including, if needed, official changes in policy; and on the basis of these findings to explore the policies, practices, and programs that might best suit both Brandeis University and the wide-ranging needs of our senior and emeriti faculty. The Task Force was asked to “provide for the Provost and the Faculty Senate a report with specific findings and recommendations of the practices concerning senior faculty support, transition to retirement, and emeriti involvement in the life of the university that seem best suited to meeting the needs of a range of faculty in the context of the mission of the university and the aims of the Strategic Plan.”

The recommendations that comprise the bulk of this report are based on these research activities and discussions by the Task Force. Our primary data come from (a) information about practices at other universities; (b) informal conversations within the Task Force and with other colleagues both retired and approaching retirement age; (c) a survey of current departmental practices regarding emeriti involvement and access, completed by 23 departments and programs, that seems to have had a sharp consciousness-raising effect in itself; (d) a formal survey of Brandeis emeriti completed by 38 emeriti, three-fourths of whom are research-active and 95% of whom live near campus; and (e) a luncheon discussion with the Task Force attended by about 30 emeriti. Because the emergent picture was fairly strong and fairly consistent, we are confident that the recommendations we propose have the potential to transform the role, visibility, and contributions of emeriti at Brandeis while also supporting the needs of senior faculty nearing retirement and enabling the institution to benefit both from the contributions and well-being of emeriti and from the increased demystification of retirement for senior faculty. The financial, academic, and programmatic benefits to the university of more involved emeriti and of better transition to retirement, we believe, far outweigh the financially modest implications of these recommendations.

Our recommendations are divided into four categories, each addressing a single question:

- 1) What rights and benefits should be available to all emeriti?
- 2) What rights and benefits should be available to research-active emeriti or emeriti with official university responsibilities for teaching, mentoring, or administrative service?
- 3) How should emeriti participate in the life of the university?
- 4) How should Brandeis facilitate the transition from the active professoriate to emeritus status?

III. Benefits for all Emeriti Faculty

The current list of rights and benefits for Brandeis emeriti is a slender one. Formal rights are only two, the right to the rank of emeritus/a (at the discretion of the provost, and on terms not specified; see Faculty Handbook III.B.2.k); and the right to attend and participate in faculty meetings without voting rights. Retired faculty are able to keep their email account, library privileges, a parking permit, theater and concert ticket discounts, and access to athletic facilities and continue to be listed in the University Bulletin and the Faculty Guide. No other benefits are currently offered uniformly to emeriti. Although there is a widespread belief that emeriti faculty have “gold pass” parking access, that is true only of emeriti who were faculty members for 25 or more years. Faculty with named chairs currently lose access to that title.

Our departmental survey confirmed that departmental benefits and practices are highly uneven. Some faculty members are included in departmental listservs but others are not; some are listed on departmental websites, some not; some are invited to departmental meetings, events, and/or activities, some not. Office space is widely variable as is access to an up-to-date office computer, and neither of these is necessarily tied to the research activity of the faculty.

The limitations of university-wide benefits and the uneven practices of departments, many of which ignore their emeriti, are disincentives both to retirement and to continued and mutually beneficial relationships between emeriti and the university. We therefore recommend that emeritus status confer the following benefits, most of which are without cost or of minimal cost and some of which are already offered but nowhere recognized by explicit commitment. In order to make sure that the benefits are widely known, we ask that they be made explicit on a university website. We further recommend that these benefits be conferred retroactively on current emeriti:

- a) **the same access as non-retired members of the faculty to LTS services (email, library, databases, research assistance, help desk, repair shop, blogs, software, etc.).** Most of these benefits are already available, but not all emeriti know this;
- b) **the same access as non-retired members of the faculty to athletic facilities, the Faculty Club, theater, on-campus meeting spaces, and the range of discounts offered to faculty.** In short, we advocate a policy that explicitly welcomes emeriti faculty to the physical space of the campus.
- c) **professional visibility along with other faculty in the Faculty Guide and phone directory and on relevant department/program websites.** Emeriti are currently recognized in the faculty guide, but telephone numbers for reaching emeriti faculty are not consistently posted in the university directory, and the presence of emeriti on departmental websites is widely variable.

d) inclusion in university-wide and departmental electronic and paper mailings to faculty. Emeriti do not cease to be invested in Brandeis or in their departments on the day of retirement and should have the option to remain on departmental faculty listservs and on university broadcast lists;

e) participation in university meetings (without voting privileges), in commencement events, and in departmental conversations and activities. Emeriti should be actively welcomed at university meetings and commencement events and invited to departmental events as a matter of course. Again, departmental practices vary widely; some emeriti are never notified of department lectures and colloquia, while others are routinely invited.

f) an all-campus (gold) parking pass, regardless of years of service, both as a recognition of service and to enable emeriti faculty to join more easily into activities across the campus. One of our distinguished retirees taught at Brandeis for 24 years, built an interdisciplinary program, and brought honor to the university in many ways. But she was not given a gold pass upon retirement because she hadn't reached her 25th year on campus. We suggest that all emeriti deserve easy access to campus parking.

g) retention of previous title (e.g. named chair) with *emeritus* or *emerita* appended. Retaining a chair title, so long as "emeritus/a" is added, does no harm to the current holder of a chair and brings continued honor to the donor. This practice is common at other institutions and is professionally and psychologically valuable to retirees.

Brandeis can offer benefits (a) through (g) at low or no cost. Together they have the benefit of improving morale and affirming value, supporting the work of emeriti both in their fields and in the world; and integrating emeriti more fully in the Brandeis community.

We also recommend two additional benefits that do have cost implications for the university. The first is likely to be used sparingly and therefore would have modest cost:

h) continued access to the same tuition remission policies available to faculty, their spouses, and their dependent children;

The second benefit will need to be investigated more fully to see what can be done in a cost-effective manner:

i) medical and dental benefits as best can be offered by the university.

The question of medical benefits has come up time and again by senior faculty and by retirees, and our anecdotal evidence suggests that the loss of health insurance is a significant concern when faculty are contemplating retirement. There is less pressure to provide medical benefits for those over 65, except that some of those retirees have younger dependents. Yet some faculty do consider medical benefits significant and some have mentioned it as a reason for delaying retirement. To our surprise, the emeriti faculty who met with us considered dental benefits to be an extremely significant desideratum, possibly even more significant than medical benefits in the case of faculty eligible for Medicare. When insurance is in play, dentists negotiate their rates; those without insurance not only get no payouts but pay higher overall charges because the insurance company is not involved in lowering the overall charge.

Many universities provide some assistance with medical and dental benefits to their emeriti faculty, and in a range of ways from coverage equivalent to that offered full-time faculty to modest assistance to allowing retirees participation in the university plan at their full expense. Not only

public universities but many private schools, including Emory, Georgia Tech, Stanford, American University, and USC, offer continued participation in the university's health plan or pay a portion of insurance costs. Brandeis currently offers nothing beyond the legally mandated COBRA option. We suggest that the university look into the feasibility of the following alternative possibilities for medical insurance:

- a) continuing health insurance benefits for a specified period (e.g. 3 or 5 years) following retirement;
- b) continuing health insurance benefits for faculty emeriti who have not yet turned 65 or for their dependents who are under 65 (Wellesley College, for example, offers this benefit);
- c) enabling faculty to stay within the university's group health insurance plan indefinitely if they pay both the university's share of the cost and the employee share;
- d) offering dental insurance to emeriti either subsidized by the university or through participation in the university's dental insurance plan. Dental insurance is offered by most of the schools that offer health insurance and, as we note above, seems especially important to emeriti.

We recognize that some, perhaps all, of these are not inexpensive options. However, medical and dental benefits do seem to affect retirement decisions, and we urge the university to consider the trade-offs in seeking to provide some amelioration for these expenses by retired or retiring faculty on limited incomes.

IV. Benefits for Research-Active and Teaching- or Mentoring-Active Emeriti Faculty

A significant portion of our retired faculty is actively engaged in research; indeed, two-thirds of the emeriti who completed our questionnaire continue to be professionally active in their field, and several have published significant books and papers, and won awards and grants, since their retirement. In terms of academic distinction, Brandeis benefits from the research accomplishments, publications, awards, and professional activities of emeriti just as it does from the research of tenured and tenure-track faculty. Some emeriti also remain active, at least for a time, in advising graduate students, mentoring younger faculty, and working with undergraduates in or out of the classroom. Yet with few exceptions the university provides no research support to emeriti and sometimes even hinders the research or mentoring agenda. We recommend, in addition to the benefits for all emeriti, the following additional benefits for retired faculty who are active as scholars, creative artists, or sustained academic mentors:

- **office or lab space with (refreshed) computer access;**
- **full use of departmental facilities, supplies, telephone and equipment;**
- **travel funds at the same level as full-time faculty for presenting research at conferences and meeting research costs;**
- **eligibility for other internal research funds and publication support (e.g. Norman grants);**
- **recognition for research in department and university publications, websites, and reports;**
- **opportunities at Brandeis to present research equivalent to those available to full-time faculty;**
- **opportunities as appropriate for mentoring, advising, and teaching;**
- **opportunities to organize research-related conferences, colloquia, and similar events.**

Emeriti faculty who are productive scholars enhance the reputation of the university. The absence of competitive research support or funding for travel to conferences, however, deters emeriti from professional activities and denies the value to the institution of their continued professional presence. Offering emeriti the same (modest) level of research and travel funds now offered to our regular faculty both affirms and facilitates the research achievements of emeriti. Providing

departmental support, inviting emeriti to present their research in departmental, divisional, and university fora, and inviting emeriti to participate in mentoring and in organizing conferences are all recognitions of the continued productivity of emeriti as well as signals that faculty who opt for retirement are not necessarily retiring from professional life.

According to departmental survey responses, only about 25% of emeriti currently have individual offices, another 25% have shared offices, and half have no office space at all. We are aware that the question of space for emeriti faculty is a delicate one on our campus, particularly for those departments where space is at a high premium. Still, we ask the university to consider the importance of space for emeriti who are pursuing an active research agenda and/or who continue in mentoring and teaching roles, and we note that continued access to office space is an explicit policy at a number of the institutions we surveyed.

Office or lab space is especially critical in the immediate aftermath of retirement so as to facilitate a smoother transition from full-time to emeritus standing. When a faculty member who has for decades had a private office has no place for meeting advisees or pursuing professional projects, the abrupt change is more than disconcerting. And for faculty engaged in long-term research, mentoring, or teaching, the loss of an office can significantly affect both research productivity and university involvement. We point to a policy such as Cornell's that explicitly "treats emeritus faculty on an equitable basis with non-retired faculty based upon post-retirement levels of teaching, research, scholarship, and outreach/extension activities." While recognizing space limitations, Cornell promises at the minimum a location "in or as close to the department as possible," a shared office with an individual desk, file cabinet, bookcase, telephone, and "basic clerical support." At Brandeis, it might be most feasible for office space to be allocated to emeriti for fixed periods and re-evaluated on, say, a biannual basis to ensure that emeriti offices are not underused as the needs and activities of emeriti change.

V. Fostering Emeriti Participation in University Life

One of the most dramatic changes facing retiring faculty is indeed isolation from a university community that has been an intellectual, professional, and social 'home' for decades. By the same token, one of the most dramatic losses to the university community of faculty retirement is that of accumulated wisdom and historical knowledge. Both of these consequences need to be addressed if we are to change the climate both for retirement and for retirees. Faculty who have spent years forming relationships with other faculty across the campus find themselves without ready access to the university community. Decades of institutional history, knowledge, and wisdom that might benefit the university go unsought and unshared. Emeriti are not even easily able to be in touch with one another; indeed, the existence a group of emeriti that have been meeting informally on campus for some years was unknown to anyone on our Task Force and to other emeriti because no emeriti-wide mechanisms of communication exist.

We have an integrated proposal for addressing this two-sided problem, a proposal we consider of particular importance because of the multifaceted purposes it can serve. **We ask the university to support the creation of a Society of Brandeis Emeriti into which all retired faculty members would be invited.** Just as our Alumni Association offers "benefits to which all graduates of Brandeis are automatically entitled," the Emeriti Society would provide retired faculty and faculty moving toward retirement with an intellectual and social community, events and activities for both emeriti and for the university as a whole, and a vehicle for communication and information on retirement and on opportunities for emeriti to participate in university life. Such associations are

increasingly common at U.S. universities including AAU members, as a means to facilitate the transition to emeriti status and maintain emeriti involvement in the university. Exemplary organizations include the Cornell Association of Professors Emeriti (CAPE), Emeritus Professors in Columbia (EPIC), Emory University Emeritus College, Stanford Emeriti Council, Wellesley's Emeriti Steering Committee, The Henry Koerner Center for Emeritus Faculty at Yale, the Boston College Association of Retired Faculty, the USC Emeriti Center, the Academy at Johns Hopkins, and many, many others.

We ask that the Society of Brandeis Emeriti be provided with:

- a modest budget for activities
- a small allocation of staff support
- a website that provides information both about emeriti activities and accomplishments and about retirement benefits and procedures
- a listserv through which emeriti can communicate among themselves
- a physical space for meetings, events, and informal gathering

The Society of Brandeis Emeriti would also become an easy mechanism for recruiting emeriti to contribute to such university projects as the Center for Teaching and Learning or the New Student Book Forum, just two examples of ways in which many emeriti faculty are eager to continue participating in university life by sharing their expertise with younger faculty and staying in touch with students. Emeriti faculty are also ideal candidates to offer special courses, from first-year seminars to life-long learning classes for alumni and other retirees. Again, other universities are far ahead of Brandeis in involving emeriti in such enterprises; see, for examples, Swarthmore's Lifelong Learning, the Georgetown University Learning Committee, and Yale's program of short courses for alumni.

Both through the Society and through other means, we also recommend that the university **formalize the role of emeriti in faculty leadership**. Our emeriti faculty care deeply about Brandeis and are eager for their perspectives, which often take a longer view than that of more recently arrived members of the community, to be heard. We believe the following roles, among others, would be appropriate role for emeriti:

- an emeritus position on the Faculty Senate
- representation of the Society for Brandeis Emeriti on the University Advisory Council
- appointment of emeriti to advisory committees, search committees, development programs, and ad hoc Task Forces as seems appropriate to the topic and useful to the university

Finally, we ask the university **to recognize the importance and facilitate the process of gathering and preserving the history of the Brandeis faculty and the legacies of emeriti members** through interviews, memoirs, contributions of material to the university archives, and other means. Currently, there is no systematic effort to gather the history of the university through its senior members or to solicit their papers for inclusion in the university archives. Emeriti should be engaged *now*, before it is too late, in documenting the history of Brandeis departments from their beginnings and indeed of the early (and ongoing) history of the university.

VI. Facilitating the Transition from Full-Time to Emeritus Standing

Presently, the number of faculty who are over the age of 60 has risen to 49% of all faculty and 46% of full-time faculty. For almost half our faculty to be over sixty is not ideal, even as distinguished as that senior faculty is: universities thrive on a spectrum of generational cohorts. Moreover, senior

faculty may want to move into new projects or pathways; others may want to scale back without retiring but may not find the institution amenable to different shapes of career. We strongly recommend that relevant senior administrators, particularly the Provost and the academic deans, **adopt a flexible approach to faculty roles and contributions to the university in the late-career years** so that faculty remain vibrant participants even as they might wish to work less than full time, shift their research agendas, or engage in new teaching-related projects. For example, a faculty member nearing retirement age but not yet ready to retire might wish to shift to half-time teaching, or might not wish to continue field work or laboratory research and prefer to allocate her or his time differently, or might wish to schedule leaves without pay.

Both the Task Force members and the emeriti faculty who met with us are adamant that Brandeis must take a new and transparent approach to retirement planning and move away from private, indeed secret, negotiations. If faculty are going to find retirement attractive, they need to be apprised not only of the benefits we have outlined above, but of how the university will allow them to configure the transitional period. We therefore recommend the establishment of a **publicly announced, ongoing policy for transition to retirement**. That policy could involve a period of reduced teaching and/or increased sabbatical time; a range of options could be made available, for example, according to whether faculty wished to remain on the regular faculty for one, three, or five years. But we strongly urge the abandonment of the current mystified, secretive, ad hoc, squeaky-wheel process that both current and retired faculty consider true of the present situation: it is seen as demoralizing and frustrating and is generally agreed to function more as a deterrent than an invitation to consider retirement.

Several of the recommendations we have made above would complement a clear and publicly visible retirement incentive plan in creating fuller incentives to retirement. Among the most significant of these are the provision of medical and dental benefits particularly (in the case of medical benefits) for those under 65 or with dependents. Support for research-active retired faculty, a general commitment to engaging emeriti in university life, and consistent department-level outreach will model for prospective emeriti a continued professional relationship with the university. The creation of a Society of Brandeis Emeriti will help to foster a more inviting transition from full-time to retired status. The Emeriti Society will also provide a visible community of potential mentors for those senior faculty who wish to learn about other faculty members' experiences of life at and beyond Brandeis after retirement; indeed, a 2013 piece in [Inside Higher Ed](#) suggests that some form of "emeritus college" can be a critical factor in the transition to retirement.

VII. Conclusion

What emeriti faculty most need—and what the university therefore most needs to offer its current and prospective emeriti—is concrete affirmation and support for their continuing professional contributions and active inclusion as ongoing members of the university. As we noted at the outset, the vast majority of the recommendations we propose here are relatively modest in cost. We believe those costs will be quickly and amply recuperated by both the increased opportunities for emeriti involvement in university life and by the stronger incentives for faculty to consider retirement. Nearly every college and university we studied has recognized the importance of developing the kinds of practices and policies we have recommended here. Indeed, nearly every college and university we studied does significantly more for its retiring and retired faculty than is currently the Brandeis norm. We too need to adjust to the post-1994 realities of the professoriate. The status quo is not a viable alternative either for our senior and emeriti faculty or for the institution as a whole.