




MEMORANDUM

To: Donna E. Shalala, President
From: Richard L. Williamson
Chair, Faculty Senate 
Date: April 25, 2012
Subject: Faculty Senate Legislation #2011-56(D) – Faculty Senate Resolution Concerning
Voluntary Retirement Incentive Program (Senior Faculty Status)

At its April 18, 2012 meeting, the Faculty Senate adopted the following resolution:
The Senate has reviewed the Provost's statement on retirement incentives. The Provost explained that the tuition remission benefits for faculty members and their dependents would remain the same, as that is currently the case for emeritus faculty.

We endorse and approve the proposed policies, subject to the following understandings:

1. The program is entirely voluntary.
2. During the pendency of the program, faculty members who meet the eligibility requirements have a right to participate in it; their participation is not contingent on the approval of Chairs, Deans or other administrators.
3. Whether a faculty member is given a particular semester off, works half-time during each semester, or participates in some other arrangement is a matter to be decided between the faculty member and the Dean, and specified in a written agreement.
4. Expectations for teaching, scholarship and service shall be spelled out in the agreement and shall be consistent with the principle that the professor's total workload is one half that of full-time REGULAR FACULTY in that faculty member's department or school.
5. Once established in the agreement in writing, terms can be modified only by mutual written agreement.
6. Faculty members can sign up for the retirement bonus (one year's salary up to a maximum of \$100,000) only in academic year 2012-13. The Senate understands that this aspect of the program is unlikely to be repeated.
7. The administration's intent is to maintain the period during which senior status can be agreed upon as a five-year experiment. It shall not be terminated during that five-year period except under extreme circumstances.
8. Termination of the program may not alter the rights of those faculty members who have already entered into agreements prior to the termination.

9. Faculty members who believe they have not been treated in accordance with the announced policies have the right to appeal the matter to the Provost through the Vice Provost for Faculty Affairs, and if necessary, through the Senate COMMITTEE ON RANK, SALARY AND CONDITIONS OF EMPLOYMENT.

The Senate further requests that the following issues be considered by the existing faculty-administration ad hoc committee during the 2012-2013 academic year:

- 1) Whether it is legally allowed and feasible to have a program whereby a faculty member can serve in a half-time status indefinitely, but under circumstances and policies that do not increase costs to the university; and
- 2) Whether it is possible to have a program, similar to the program approved above, for those who have served for a substantial amount of time at UM but have not reached age 62 (that is, adding an age plus service component), and if so, what changes in the program would need to be made to comply with legal requirements and remain feasible.

The Senate hereby expresses its appreciation for the work of the Provost, the Vice Provost for Faculty Affairs, the ad hoc Faculty-Administration Committee, and personnel from Human Resources and the General Counsel's Office for their roles in dealing with this matter. It takes note of the fact that the program draws heavily on the Senate's original proposal.

This legislation is sent for your information.

RW/rh

cc: Thomas LeBlanc, Executive Vice President and Provost
Aileen Ugalde, University Secretary and General Counsel
David Birnbach, Vice Provost, Faculty Affairs