SUBJECT Proposed Policy Amendment: Retired Faculty Appointment Policy (AP1)

SUBMITTED TO People, Community & International Committee

MEETING DATE June 10, 2024

SESSION Recommended session criteria from Board meeting Policy:
CLASSIFICATION OPEN

REQUEST For input only - No action requested

LEAD EXECUTIVE Hubert Lai, K.C., University Counsel

SUPPORTED BY Gage Averill, Provost and Vice-President, Academic (UBC Vancouver)
Rehan Sadiq, Provost and Vice-President, Academic (UBC Okanagan)
Erika Brimacombe, Legal Counsel

PRIOR SUBMISSIONS
The subject matter of this submission has not previously been considered by the People, Community & International Committee.

EXECUTIVE SUMMARY
The Retired Faculty Appointment Policy (AP1) (the “Policy”) was created in 1977 and last substantively amended in 2013. The responsible Board Committee is the People, Community & International Committee and the Responsible Executives are Dr. Gage Averill, Provost and Vice-President, Academic (UBC Vancouver) and Dr. Rehan Sadiq, Provost and Vice-President, Academic (UBC Okanagan).

Upon request by the Provosts and Vice-Presidents, Academic, the Office of the University Counsel convened a Policy Development Committee consisting of subject matter experts and key stakeholder representatives (the “Policy Development Committee”) to review the current Policy and make recommendations to the Board of Governors regarding amendments to the Policy.

The primary objective of the review is to expand the definition of “retired Faculty Member”. Currently, the Policy defines “retired Faculty Member” as “a UBC tenure-stream faculty, librarian or program director retired from the University”. The proposed expansion of this definition would also include “any other person who holds Emeritus status under Vancouver Senate Policy V-250.2: Emeritus Status or Okanagan Senate Policy O-250: Emeritus Status, as those Senate policies may be amended from time to time”.

Under the Vancouver Senate’s current Policy V-250.2: Emeritus Status, individuals may be eligible for emeritus status if they hold “confirmed Clinical appointments in the Faculty of Medicine, and those holding Clinical or equivalent Honorary or Adjunct appointments in other faculties”.

The proposed expansion of the definition serves to ensure that clinical faculty members who have received emeritus status, but who return to serve clinical appointments post-retirement, are not excluded from eligibility for post-retirement appointments under the Policy. Although the proposed amendment is tightly focused, the Policy Development Committee reviewed the Policy in its entirety and is satisfied that the rest of the Policy continues to serve UBC’s needs well and no other amendments are required or desirable.

Next Steps
Subject to any feedback from the People, Community & International Committee, the next step will be to post the proposed amendments to the Policy on the website of the Office of the University Counsel and in UBC Today for
public comments by the UBC community. UBC Today is circulated electronically to all staff members and faculty members at UBC, including all clinical faculty members. In addition, the UBC Emeritus College will work with the Policy Development Committee to disseminate communications to the UBC emeritus community. Given that many of the individuals who will be affected by the proposed amendment are retired, the consultation period will be longer than usual, ending on July 22, 2024, to give members of the UBC community a generous opportunity to provide their feedback. The Policy Development Committee will reconvene in August after the consultation period to consider the comments received. After reviewing the community’s input, the Policy Development Committee will submit a final recommendation to the People, Community & International Committee for targeted approval by the Board of Governors in September 2024.

APPENDICES

1. Proposed amendments to AP1

SUPPLEMENTAL MATERIALS (optional reading for Governors)

1. Blackline showing amendments to policy
2. Senate Policy V-250.2: Emeritus Status
3. Senate Policy O-250: Emeritus Status
4. List of Members of the Policy Development Committee
5. The current Retired Faculty Appointment Policy is available at: https://universitycounsel.ubc.ca/policies/retired-faculty-appointment-policy/
The University of British Columbia  
Board of Governors

Policy No.:  
AP1

Long Title:  
Appointment of Retired Faculty Members

Short Title:  
Retired Faculty Appointment Policy

Background & Purposes:

A Faculty Member’s decision to retire from the University is voluntary, and may include retirement before or after age 65. The normal retirement date for Faculty Members is the June 30th or December 31st following the date upon which the Faculty Member turns age 65.

Retired Faculty Members make important contributions to their disciplines, their departments and to the University. Retired Faculty Members wishing to continue to engage with the University normally continue their relationship with the University through voluntary contributions without a University appointment; in other cases, the relationship is continued through a term appointment. This Policy sets out the circumstances in which a retired Faculty Member may be appointed to a position at the University and that the mechanism for doing so is outside of the normal appointment process.

1. For the purposes of this Policy, the term “retired Faculty Member” means:

   1.1 a UBC tenure-stream faculty member, librarian, or program director who has retired from the University; or

   1.2 any other person who holds Emeritus status under Senate Policy V-250.2: Emeritus Status or Senate Policy O-250: Emeritus Status, as those Senate policies may be amended from time to time.

2. A retired Faculty Member may be appointed in accordance with this Policy:

   2.1 for a salaried appointment, for a renewable term of one year or less, or

   2.2 for a non-salaried appointment, for a renewable term of three years or less.

3. The appointment must provide a specific benefit for the unit or faculty, and the University.

4. Each appointment shall set out specific responsibilities in a letter of appointment. Responsibilities may include, but are not limited to:

   4.1 teaching;
4.2 research and scholarly work;
4.3 educational leadership;
4.4 collection development; and/or
4.5 service including administrative responsibilities.

5. The University may terminate an appointment made pursuant to this Policy:

5.1 for a salaried or non-salaried appointment, without notice where there is cause for termination;
or
5.2 for a non-salaried appointment, by providing at least one month written notice of termination;
or
5.3 for a salaried appointment, by providing written notice of termination, or pay in lieu of notice, as set out in the Employment Standards Act or the letter of appointment, whichever is greater.

6. Unless otherwise set out in the letter of appointment, a retired Faculty Member holding a salaried or non-salaried appointment made pursuant to this Policy may resign from his or her appointment with two weeks written notice to the University, which may be waived by the University.

7. All reappointments under this Policy must be made in accordance with the same process and requirements as for appointment.
Long Title: Appointment of Retired Faculty Members

Short Title: Retired Faculty Appointment Policy

Background & Purposes:

A Faculty Member’s decision to retire from the University is voluntary, and may include retirement before or after age 65. The normal retirement date for Faculty Members is the June 30th or December 31st following the date upon which the Faculty Member turns age 65.

Retired Faculty Members make important contributions to their disciplines, their departments and to the University. Retired Faculty Members wishing to continue to engage with the University normally continue their relationship with the University through voluntary contributions without a University appointment; in other cases, the relationship is continued through a term appointment. This Policy sets out the circumstances in which a retired Faculty Member may be appointed to a position at the University and that the mechanism for doing so is outside of the normal appointment process.

1. For the purposes of this Policy, the term “retired Faculty Member” means:
   1.1 a UBC tenure-stream faculty member, librarian, or program director who has retired from the University; or
   1.1.2 any other person who holds Emeritus status under Senate Policy V-250.2: Emeritus Status or Senate Policy O-250: Emeritus Status, as those Senate policies may be amended from time to time.

2. A retired Faculty Member may be appointed in accordance with this Policy:
   2.1 for a salaried appointment, for a renewable term of one year or less, or
   2.2 for a non-salaried appointment, for a renewable term of three years or less.

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   5.1 for a salaried or non-salaried appointment, without notice where there is cause for termination; or
   5.2 for a non-salaried appointment, by providing at least one month written notice of termination; or
   5.3 for a salaried appointment, by providing written notice of termination, or pay in lieu of notice, as set out in the Employment Standards Act or the letter of appointment, whichever is greater.

6. Unless otherwise set out in the letter of appointment, a retired Faculty Member holding a salaried or non-salaried appointment made pursuant to this Policy may resign from his or her appointment with two weeks written notice to the University, which may be waived by the University.

7. All reappointments under this Policy must be made in accordance with the same process and requirements as for appointment.
Number & Title

V-250.2: Emeritus Status

Effective Date:

16 December 2015

Approval Date:

Proposed for consideration by the Vancouver Senate on 16 December 2015.

Review Date:

This policy shall be reviewed five (5) years after approval and thereafter as deemed necessary by the responsible committee.

Responsible Committee:

Tributes Committee of the Vancouver Senate

Authority:

University Act,
S. 5(1)

“The convocation of a university is composed of the following persons:

(f) all persons whose names are added to the roll of the convocation by the senate;

S. 9
(1) The senate is to make rules governing procedure for the transaction of business by the convocation.

(2) The senate may add names to the roll of the convocation under section 5.

S. 37(1)

The academic governance of the university is vested in the senate and it has the following powers:

(b) to establish committees it considers necessary and, by 2/3 vote of its members present, to delegate to one or more committees those of its powers as it may determine

Purpose and Goals:

This policy outlines the criteria for granting or revoking emeritus status.

Applicability:

This policy is applicable to employees of the University who retire or resign while holding tenured appointment as a Professor, Professor of Teaching, Associate Professor, Assistant Professor, Senior Instructor or a confirmed appointment as a General Librarian, Administrative Librarian, Program Director, Clinical Professor, or Clinical Associate Professor.

Exclusions:

None.

Definitions:

None.

Policy:

(1) To be eligible for emeritus status, an individual must:

   a. Have a combined age at retirement/resignation plus years of full-time service to the University of 70 or more;

   b. Have held a full-time tenured position at the rank of Professor, Professor of Teaching, Associate Professor, Assistant Professor or Senior Instructor. Librarians and Program Directors must have held a Confirmed appointment; and
c. Not be retiring or resigning from the University in order to take up a faculty appointment in another university. If an individual is retiring or resigning from the University in order to take up such appointment, he or she may be considered for emeritus status once he or she has retired or resigned from that or any other such subsequent appointment.

(2) Individuals holding confirmed Clinical appointments in the Faculty of Medicine, and those holding Clinical or equivalent Honorary or Adjunct appointments in other faculties, may be eligible for emeritus status at the time of retirement/resignation from active University service if they are recommended by their Dean and Department and meet the following criteria:

a. A minimum of 15 years of continuous service;
b. Hold the rank of Clinical Associate Professor or Clinical Professor or demonstrate a scholarly record that has been reviewed at the department and faculty levels according to established University procedures for equivalent level; and
c. Demonstrate service that is strongly identified with the University and deemed worthy of continuing recognition.

(3) Emeritus status shall generally result in a title that corresponds with a person’s rank and appointment at the time of retirement or resignation with the word “Emeritus” or “Emerita” (at the individual’s preference) added thereafter; however, a retiring or resigning employee may specify a previously-held appointment (e.g., in another department or discipline) if he or she views it as more appropriate.

(4) Should a person eligible for emeritus status have also held an administrative position as a President, Vice-President, Registrar, or Dean of the University, they shall have the option of specifying this title as the basis of their emeritus title in lieu of the title corresponding to their academic appointment at the time of retirement or resignation.

(5) At the completion of their final term of office, a former chancellor shall automatically be granted emeritus status and the rank of Chancellor Emeritus.

(6) Individuals who did not meet the eligibility for emeritus status set out in Section 1 at the time of their retirement or resignation, but who subsequently do so may apply for the status to be granted.

(7) Senate, at its discretion, may decide under exceptional circumstances, not to grant emeritus status or to revoke emeritus status from an individual.
(8) The responsible committee shall establish procedures under this policy for the recommendation and consideration of emeritus status and for appealing a negative recommendation.

Calendar Statement:

There are no calendar statements under this policy.

Consultations

The following groups have been consulted during the development of this policy:

    Faculty Relations

History:

This is the third version of this policy. Changes in this version cover:
1. Applicability of the traditional benefits, Procedures, s.6(c) Tuition waivers for Emeriti under age 65, and (d) Tuition waivers for dependent children.
2. Policy: the traditional benefits of tuition waivers for Emeriti under age 65 and tuition waivers for dependent children are only applicable for those Emeriti who were eligible to receive those benefits prior to retirement.

Related Policies:

None

Appendix:

There is no appendix to this policy.

Procedures:

1. In May and December of each year, Faculty Relations will forward a list to the responsible committee via the Registrar of retiring or resigning faculty members who meet the combined age and service requirement set out in Section 1 of the Policy.

2. In May and December of each year, a list of individuals holding clinical appointments in the Faculty of Medicine or other faculties and who would be eligible for emeritus status under Section 2 of this Policy shall be forwarded to responsible committee by Faculties. The responsible committee will verify
with Faculty Relations that individuals satisfy the criteria for emeritus status for Clinical faculty.

3. Upon responsible committee recommendation, a list of individuals eligible for emeritus status will be forwarded to Senate for approval.

4. Following Senate approval, the Registrar shall notify individuals of their emeritus status by letter and add all emeriti to the Roll of Convocation.

5. Should a faculty or the responsible committee decide not to recommend an individual for emeritus status – or recommend their status at a rank or title they do not consider appropriate – they may appeal that recommendation to the Provost who shall review the matter and make whatever recommendation to the Senate he or she considers appropriate.

6. The University is not obliged to offer any privilege or benefit to those with emeritus status; however, it recognizes the following traditional benefits:

   a. Free parking on campus
   b. Free library card
   c. Tuition waivers for Emeriti under age 65 (any BC resident age 65 or older is eligible for free tuition)*
   d. Tuition waivers for dependent children*
   e. Internet and email services
   f. Membership in the Association of Professors Emeriti

   *applicable only for those individuals described in section (1) of this policy
Number & Title

O-250: Emeritus Status

Effective Date:

20 May 2021

Approval Date:

20 May 2021

Review Date:

This policy shall be reviewed five (5) years after approval and thereafter as deemed necessary by the responsible committee.

Responsible Committee:

Learning & Research Committee of the Okanagan Senate

Authority:

University Act,
S. 5(1)

“The convocation of a university is composed of the following persons:

(f) all persons whose names are added to the roll of the convocation by the senate;

S. 9

(1) The senate is to make rules governing procedure for the transaction of business by the convocation.
(2) The senate may add names to the roll of the convocation under section 5.

S. 37(1)

The academic governance of the university is vested in the senate and it has the following powers:
(b) to establish committees it considers necessary and, by 2/3 vote of its members present, to delegate to one or more committees those of its powers as it may determine

Purpose and Goals:

This policy outlines the criteria for granting or revoking emeritus status.

Applicability:

This policy is applicable to employees of the University who retire or resign while holding tenured appointment as a Professor, Professor of Teaching, Associate Professor, Assistant Professor, Senior Instructor or a confirmed appointment as a General Librarian or Administrative Librarian.

Exclusions:

None.

Definitions:

None.

Policy:

(1) To be eligible for emeritus status, an individual must:

a. Have a combined age at retirement/resignation plus years of full-time service to the University of 70 or more;

b. Have held a full-time tenured position at the rank of Professor, Professor of Teaching, Associate Professor, Assistant Professor, Associate Professor of Teaching, Assistant Professor of Teaching or Senior Instructor. Librarians must have held a Confirmed appointment; and

c. Not be retiring or resigning from the University in order to take up a faculty appointment in another university. If an individual is retiring or resigning from the University in order to take up such appointment, he or she may be considered for emeritus status once he or she has retired or resigned from that or any other such subsequent appointment.

(2) Emeritus status shall generally result in a title that corresponds with a person’s rank and appointment at the time of retirement or resignation with the word “Emeritus” or “Emerita” (at the individual’s preference) added thereafter; however, a retiring or resigning employee may specify a previously-held appointment (e.g., in another department or discipline) if he or she views it as more appropriate.

Should a person eligible for emeritus status have also held an administrative
position as a President, Vice-President, Registrar, or Dean of the University, they shall have the option of specifying this title as the basis of their emeritus title in lieu of the title corresponding to their academic appointment at the time of retirement or resignation.

(3) At the completion of their final term of office, a former chancellor shall automatically be granted emeritus status and the rank of Chancellor Emeritus.

(4) Individuals who did not meet the eligibility for emeritus status set out in Section 1 at the time of their retirement or resignation, but who subsequently do so may apply for the status to be granted.

(5) Senate, at its discretion, may decide under exceptional circumstances, not to grant emeritus status or to revoke emeritus status from an individual.

(6) The responsible committee shall establish procedures under this policy for the recommendation and consideration of emeritus status and for appealing a negative recommendation.

Calendar Statement:

There are no calendar statements under this policy.

Consultations

The following groups have been consulted during the development of this policy:

- Human Resources; Deans, Directors, and Heads; Students Union
- Okanagan; Disability Resource Centre; Centre for Teaching and Learning; AVP Students; Academic Advising; Enrolment Services;
- Office of the Ombudsperson for Students; University Library; Office of the Provost; and Office of University Counsel.

History:

This is the second version of this policy. The first was dated April 2014.

Related Policies:

None
Appendix:

There is no appendix to this policy.

Procedures:

1. In May and December of each year, Faculty Relations will forward a list to the Deans of Faculties and the University Librarian via the Registrar of the retiring or resigning faculty member/librarian who meet the combined age and service requirement set out in Section 1 of the Policy. Deans and the University Librarian will forward the list to the Heads of departments of the retiring or resigning faculty member/librarian.

2. Heads, upon consultation with tenured and tenure-track faculty members of their department or, in the case of librarians, confirmed and confirmation-track librarians, will provide a recommendation on emeritus status to the Dean or the University Librarian. The Dean or the University Librarian will review the departmental recommendation and provide a recommendation to the responsible committee.

   Upon responsible committee recommendation, a list of individuals eligible for emeritus status will be forwarded to Senate for approval.

3. Following Senate approval, the Registrar shall notify individuals of their emeritus status by letter and add all emeriti to the Roll of Convocation.

4. Should a faculty or the responsible committee decide not to recommend an individual for emeritus status – or recommend their status at a rank or title they do not consider appropriate – they may appeal that recommendation to the Provost who shall review the matter and make whatever recommendation to the Senate he or she considers appropriate.

5. The University is not obliged to offer any privilege or benefit to those with emeritus status; however, it recognizes the following traditional benefits:

   a. Complimentary parking on campus (taxable benefit)
   b. Free library card
   c. Tuition waivers for Emeriti under age 65 (any BC resident age 65 or older is eligible for free tuition)
   d. Tuition waivers for dependent children
   e. Internet and email services
   f. Office and/or Research space (as available, subject to Department approval and arrangements)
   g. Membership in the Association of Professors Emeriti
List of Members of the AP1 Retired Faculty Appointment Policy Development Committee

The Office of the University Counsel constitute a Policy Development Committee comprised of the following members:

- **Hubert Lai**, K.C., University Counsel, Office of the University Counsel (Chair)
- **Erika Brimacombe**, Legal Counsel, Office of the University Counsel (Secretary)
- **Moura Quayle**, Vice-Provost and Associate Vice-President, Academic Affairs
- **Dr. Peter Simpson**, Dean of the College of Graduate Studies, UBC Okanagan
- **Mark Trowell**, Executive Director, Faculty Relations & ALDP Human Resources
- **Dr. Mieke Koehoorn**, Vice Dean, Academic Affairs, Faculty of Medicine
- **Sandy Liu**, Director, Human Resources, Faculty of Medicine
- **Marie Tarrant**, Dean, Faculty of Health and Social Development, UBC Okanagan
- **Paul Harrison**, Principal of the Executive of the UBC Emeritus College
Background & Purposes:

A Faculty Member’s decision to retire from the University is voluntary, and may include retirement before or after age 65. The normal retirement date for Faculty Members is the June 30th or December 31st following the date upon which the Faculty Member turns age 65.

Retired Faculty Members make important contributions to their disciplines, their departments and to the University. Retired Faculty Members wishing to continue to engage with the University normally continue their relationship with the University through voluntary contributions without a University appointment; in other cases, the relationship is continued through a term appointment. This Policy sets out the circumstances in which a retired Faculty Member may be appointed to a position at the University and that the mechanism for doing so is outside of the normal appointment process.

1. For the purposes of this Policy, the term “retired Faculty Member” means:

   1.1 a UBC tenure-stream faculty member, librarian, or program director who has retired from the University; or

   1.1.2 any other person who holds Emeritus status under Senate Policy V-250.2: Emeritus Status or Senate Policy O-250: Emeritus Status, as those Senate policies may be amended from time to time.

2. A retired Faculty Member may be appointed in accordance with this Policy:

   2.1 for a salaried appointment, for a renewable term of one year or less, or

   2.2 for a non-salaried appointment, for a renewable term of three years or less.

3. The appointment must provide a specific benefit for the unit or faculty, and the University.

4. Each appointment shall set out specific responsibilities in a letter of appointment. Responsibilities may include, but are not limited to:
4.1 teaching;

4.2 research and scholarly work;

4.3 educational leadership;

4.4 collection development; and/or

4.5 service including administrative responsibilities.

5. The University may terminate an appointment made pursuant to this Policy:

5.1 for a salaried or non-salaried appointment, without notice where there is cause for termination; or

5.2 for a non-salaried appointment, by providing at least one month written notice of termination; or

5.3 for a salaried appointment, by providing written notice of termination, or pay in lieu of notice, as set out in the Employment Standards Act or the letter of appointment, whichever is greater.

6. Unless otherwise set out in the letter of appointment, a retired Faculty Member holding a salaried or non-salaried appointment made pursuant to this Policy may resign from his or her appointment with two weeks written notice to the University, which may be waived by the University.

7. All reappointments under this Policy must be made in accordance with the same process and requirements as for appointment.
Number & Title

V-250.2: Emeritus Status

Effective Date:

16 December 2015

Approval Date:

Proposed for consideration by the Vancouver Senate on 16 December 2015.

Review Date:

This policy shall be reviewed five (5) years after approval and thereafter as deemed necessary by the responsible committee.

Responsible Committee:

Tributes Committee of the Vancouver Senate

Authority:

University Act,
S. 5(1)

“The convocation of a university is composed of the following persons:

(f) all persons whose names are added to the roll of the convocation by the senate;

S. 9
(1) The senate is to make rules governing procedure for the transaction of business by the convocation.

(2) The senate may add names to the roll of the convocation under section 5.

S. 37(1)

The academic governance of the university is vested in the senate and it has the following powers:

(b) to establish committees it considers necessary and, by 2/3 vote of its members present, to delegate to one or more committees those of its powers as it may determine

Purpose and Goals:

This policy outlines the criteria for granting or revoking emeritus status.

Applicability:

This policy is applicable to employees of the University who retire or resign while holding tenured appointment as a Professor, Professor of Teaching, Associate Professor, Assistant Professor, Senior Instructor or a confirmed appointment as a General Librarian, Administrative Librarian, Program Director, Clinical Professor, or Clinical Associate Professor.

Exclusions:

None.

Definitions:

None.

Policy:

(1) To be eligible for emeritus status, an individual must:

a. Have a combined age at retirement/resignation plus years of full-time service to the University of 70 or more;

b. Have held a full-time tenured position at the rank of Professor, Professor of Teaching, Associate Professor, Assistant Professor or Senior Instructor. Librarians and Program Directors must have held a Confirmed appointment; and
c. Not be retiring or resigning from the University in order to take up a faculty appointment in another university. If an individual is retiring or resigning from the University in order to take up such appointment, he or she may be considered for emeritus status once he or she has retired or resigned from that or any other such subsequent appointment.

(2) Individuals holding confirmed Clinical appointments in the Faculty of Medicine, and those holding Clinical or equivalent Honorary or Adjunct appointments in other faculties, may be eligible for emeritus status at the time of retirement/resignation from active University service if they are recommended by their Dean and Department and meet the following criteria:

a. A minimum of 15 years of continuous service;

b. Hold the rank of Clinical Associate Professor or Clinical Professor or demonstrate a scholarly record that has been reviewed at the department and faculty levels according to established University procedures for equivalent level; and

c. Demonstrate service that is strongly identified with the University and deemed worthy of continuing recognition.

(3) Emeritus status shall generally result in a title that corresponds with a person’s rank and appointment at the time of retirement or resignation with the word “Emeritus” or “Emerita” (at the individual’s preference) added thereafter; however, a retiring or resigning employee may specify a previously-held appointment (e.g., in another department or discipline) if he or she views it as more appropriate.

(4) Should a person eligible for emeritus status have also held an administrative position as a President, Vice-President, Registrar, or Dean of the University, they shall have the option of specifying this title as the basis of their emeritus title in lieu of the title corresponding to their academic appointment at the time of retirement or resignation.

(5) At the completion of their final term of office, a former chancellor shall automatically be granted emeritus status and the rank of Chancellor Emeritus.

(6) Individuals who did not meet the eligibility for emeritus status set out in Section 1 at the time of their retirement or resignation, but who subsequently do so may apply for the status to be granted.

(7) Senate, at its discretion, may decide under exceptional circumstances, not to grant emeritus status or to revoke emeritus status from an individual.
(8) The responsible committee shall establish procedures under this policy for the recommendation and consideration of emeritus status and for appealing a negative recommendation.

Calendar Statement:

There are no calendar statements under this policy.

Consultations

The following groups have been consulted during the development of this policy:

Faculty Relations

History:

This is the third version of this policy. Changes in this version cover:

1. Applicability of the traditional benefits, Procedures, s.6(c) Tuition waivers for Emeriti under age 65, and (d) Tuition waivers for dependent children.
2. Policy: the traditional benefits of tuition waivers for Emeriti under age 65 and tuition waivers for dependent children are only applicable for those Emeriti who were eligible to receive those benefits prior to retirement.

Related Policies:

None

Appendix:

There is no appendix to this policy.

Procedures:

1. In May and December of each year, Faculty Relations will forward a list to the responsible committee via the Registrar of retiring or resigning faculty members who meet the combined age and service requirement set out in Section 1 of the Policy.

2. In May and December of each year, a list of individuals holding clinical appointments in the Faculty of Medicine or other faculties and who would be eligible for emeritus status under Section 2 of this Policy shall be forwarded to responsible committee by Faculties. The responsible committee will verify
with Faculty Relations that individuals satisfy the criteria for emeritus status for Clinical faculty.

3. Upon responsible committee recommendation, a list of individuals eligible for emeritus status will be forwarded to Senate for approval.

4. Following Senate approval, the Registrar shall notify individuals of their emeritus status by letter and add all emeriti to the Roll of Convocation.

5. Should a faculty or the responsible committee decide not to recommend an individual for emeritus status – or recommend their status at a rank or title they do not consider appropriate – they may appeal that recommendation to the Provost who shall review the matter and make whatever recommendation to the Senate he or she considers appropriate.

6. The University is not obliged to offer any privilege or benefit to those with emeritus status; however, it recognizes the following traditional benefits:

   a. Free parking on campus
   b. Free library card
   c. Tuition waivers for Emeriti under age 65 (any BC resident age 65 or older is eligible for free tuition)*
   d. Tuition waivers for dependent children*
   e. Internet and email services
   f. Membership in the Association of Professors Emeriti

   *applicable only for those individuals described in section (1) of this policy
Number & Title

O-250: Emeritus Status

Effective Date:

20 May 2021

Approval Date:

20 May 2021

Review Date:

This policy shall be reviewed five (5) years after approval and thereafter as deemed necessary by the responsible committee.

Responsible Committee:

Learning & Research Committee of the Okanagan Senate

Authority:

University Act,
S. 5(1)

“The convocation of a university is composed of the following persons:

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(1) The senate is to make rules governing procedure for the transaction of business by the convocation.
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Exclusions:

None.

Definitions:

None.

Policy:

(1) To be eligible for emeritus status, an individual must:

   a. Have a combined age at retirement/resignation plus years of full-time service to the University of 70 or more;
   b. Have held a full-time tenured position at the rank of Professor, Professor of Teaching, Associate Professor, Assistant Professor, Associate Professor of Teaching, Assistant Professor of Teaching or Senior Instructor. Librarians must have held a Confirmed appointment; and
   c. Not be retiring or resigning from the University in order to take up a faculty appointment in another university. If an individual is retiring or resigning from the University in order to take up such appointment, he or she may be considered for emeritus status once he or she has retired or resigned from that or any other such subsequent appointment.

(2) Emeritus status shall generally result in a title that corresponds with a person’s rank and appointment at the time of retirement or resignation with the word “Emeritus” or “Emerita” (at the individual’s preference) added thereafter; however, a retiring or resigning employee may specify a previously-held appointment (e.g., in another department or discipline) if he or she views it as more appropriate.

Should a person eligible for emeritus status have also held an administrative
position as a President, Vice-President, Registrar, or Dean of the University, they shall have the option of specifying this title as the basis of their emeritus title in lieu of the title corresponding to their academic appointment at the time of retirement or resignation.

(3) At the completion of their final term of office, a former chancellor shall automatically be granted emeritus status and the rank of Chancellor Emeritus.

(4) Individuals who did not meet the eligibility for emeritus status set out in Section 1 at the time of their retirement or resignation, but who subsequently do so may apply for the status to be granted.

(5) Senate, at its discretion, may decide under exceptional circumstances, not to grant emeritus status or to revoke emeritus status from an individual.

(6) The responsible committee shall establish procedures under this policy for the recommendation and consideration of emeritus status and for appealing a negative recommendation.

Calendar Statement:

There are no calendar statements under this policy.

Consultations

The following groups have been consulted during the development of this policy:

- Human Resources; Deans, Directors, and Heads; Students Union Okanagan; Disability Resource Centre; Centre for Teaching and Learning; AVP Students; Academic Advising; Enrolment Services;
- Office of the Ombudsperson for Students; University Library; Office of the Provost; and Office of University Counsel.

History:

This is the second version of this policy. The first was dated April 2014.

Related Policies:

None
Appendix:

There is no appendix to this policy.

Procedures:

1. In May and December of each year, Faculty Relations will forward a list to the Deans of Faculties and the University Librarian via the Registrar of the retiring or resigning faculty member/librarian who meet the combined age and service requirement set out in Section 1 of the Policy. Deans and the University Librarian will forward the list to the Heads of departments of the retiring or resigning faculty member/librarian.

2. Heads, upon consultation with tenured and tenure-track faculty members of their department or, in the case of librarians, confirmed and confirmation-track librarians, will provide a recommendation on emeritus status to the Dean or the University Librarian. The Dean or the University Librarian will review the departmental recommendation and provide a recommendation to the responsible committee.

Upon responsible committee recommendation, a list of individuals eligible for emeritus status will be forwarded to Senate for approval.

3. Following Senate approval, the Registrar shall notify individuals of their emeritus status by letter and add all emeriti to the Roll of Convocation.

4. Should a faculty or the responsible committee decide not to recommend an individual for emeritus status – or recommend their status at a rank or title they do not consider appropriate – they may appeal that recommendation to the Provost who shall review the matter and make whatever recommendation to the Senate he or she considers appropriate.

5. The University is not obliged to offer any privilege or benefit to those with emeritus status; however, it recognizes the following traditional benefits:

   a. Complimentary parking on campus (taxable benefit)
   b. Free library card
   c. Tuition waivers for Emeriti under age 65 (any BC resident age 65 or older is eligible for free tuition)
   d. Tuition waivers for dependent children
   e. Internet and email services
   f. Office and/or Research space (as available, subject to Department approval and arrangements)
   g. Membership in the Association of Professors Emeriti
List of Members of the AP1 Retired Faculty Appointment Policy Development Committee

The Office of the University Counsel constitute a Policy Development Committee comprised of the following members:

- **Hubert Lai**, K.C., University Counsel, Office of the University Counsel (Chair)
- **Erika Brimacombe**, Legal Counsel, Office of the University Counsel (Secretary)
- **Moura Quayle**, Vice-Provost and Associate Vice-President, Academic Affairs
- **Dr. Peter Simpson**, Dean of the College of Graduate Studies, UBC Okanagan
- **Mark Trowell**, Executive Director, Faculty Relations & ALDP Human Resources
- **Dr. Mieke Koehoorn**, Vice Dean, Academic Affairs, Faculty of Medicine
- **Sandy Liu**, Director, Human Resources, Faculty of Medicine
- **Marie Tarrant**, Dean, Faculty of Health and Social Development, UBC Okanagan
- **Paul Harrison**, Principal of the Executive of the UBC Emeritus College