

2018-19 Retirement Planning-Components to Pathways Memo

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2018-19 Memo from vice chancellor levine on retirement planning-components to pathways

Date: December 17, 2018

To: Deans, Directors, Department Chairs & Administrative Officers

From: Michael Levine, Vice Chancellor, Academic Personnel

Subject: Retirement Planning – Components to Pathways

Since the Pathways to Retirement program was established in 2008, more than 200 members of the faculty have taken advantage of the opportunity to set a specific date for retirement up to two years in the future in conjunction with specific plans of research, teaching, and service both preceding and following the move to emerita/us status. Pathways Agreements include an appointee's letter irrevocably retiring as of a fixed date (usually the penultimate business day of June). I recently wrote to all faculty regarding the retirement process and their continuing engagement as emeriti. I urge you to share this letter with them.

The growing popularity of this program — two thirds of the Agreements have been established in the past two years — is due in part to two initiatives launched in the spring 2015: the **Path Forward** faculty retirement workshops and the appointment of UCLA's first Faculty Retirement Liaison, Emeritus Professor David Lopez (dlopez@ucla.edu). Professor Lopez works directly with faculty members planning for retirement and he is available to consult with chairs and deans on matters relating to faculty retirement and emeriti welfare. The Liaison website includes a guide to making Pathways retirement agreements, a summary of emeriti faculty rights, and tips on navigating the UCRP retirement process. The website offers an unofficial guide to the new 2016 Tier of the UC Retirement Program that may be of help to you and your new faculty.

Here are some elements you may want to include in a Pathways agreement:

1. Recall: Campus administrators may enter a pre-retirement agreement with a faculty member who is at least age 60 with 5 years of UCRP service credit for a recall to service *after retirement* for up to three years, beginning no sooner than the date of retirement + 30 days. Recall may be renewed year by year thereafter. Recall may be for teaching, research, or administration, and must be based on programmatic need and budgetary capacity. The agreement should specify: the course(s) to be taught or other services to be rendered; a rate of compensation not to exceed 43% of pre-retirement compensation for each fiscal year and a statement that it is

contingent on the faculty member's continued willingness and capacity to maintain a pre-retirement quality of performance. Recall teaching is compensated on a per-course basis, following campus guidelines. See APM-205.

2. Deferral of Five-Year Review: Agreements may "defer" a five-year review (or a review's remedial plan); see UCLA CALL, Appendix 12. Averting a five-year review in this manner may be advantageous because a five-year review may lead, in cases of reduced scholarly output, to an increase in teaching and service. Such a deferral can be especially attractive when combined with granting teaching relief (see below).

3. Chair's Grant of Teaching Relief: Teaching obligations may be shifted or reduced where departmental needs justify such alterations (e.g., the department will benefit if the faculty member engages in curriculum development or co-teaching, provides special administrative services, or concludes unfinished research or catalogues one's scholarly work and research). Such relief is generally spread over one or two years prior to retirement. The specifics are determined by departments and schools, in line with their needs and resources. In special circumstances, a faculty member may return from a sabbatical (as required by the APM) to such modified teaching relief. Please consult me regarding this or any other modification of your standard sabbatical practice.

4. Space: Consistent with campus guidelines for emeriti/ae offices and laboratory space, Chairs, with support from their Deans, may approve an allocation of post-retirement space as a component of pre-retirement Pathways Agreements, subject to campus space policies and availability.

5. Research Funds: At the expense of the School or Department, post-retirement research funds may be made available, provided that use conforms to established University policy governing the expenditure of research funds. In very special cases these funds may carry over from an Endowed Chair, as specified in the UCLA CALL, Appendix 18.

6. Research Professor Title: Emeriti faculty continuing active research programs have embraced the opportunity to apply for the title of Research Professor (or Distinguished Research Professor, for Above Scale Faculty), which they may use in lieu of Professor Emeritus. Chair's and Dean's support for this title may be included as a component of Pathways agreements, pursuant to UCLA CALL, Appendix 38.

The form that should be used in setting out the plan and obtaining my approval and the Dean's is found at: Pathways to Retirement Faculty Agreement Form (DOC). Professor Lopez works with individual faculty members to adapt this form to their specific situations. Please contact my special assistant, Professor Robert Goldstein when you are ready to finalize a Pathways agreement at (goldstein@law.ucla.edu).