Committee on University Emeriti and Pre-Retirement Relations, 2006-2007 Annual Report

To the Academic Senate, Los Angeles Division:

The committee on University Emeriti and Pre-Retirement Relations is responsible for maintaining communication with emeriti on matters of concern to them and with active faculty on retirement-related matters. Where appropriate, the Committee has the responsibility to inform and consult with the Office of the Chancellor and the Los Angeles Division of the Academic Senate regarding matters of concern to these groups. The Committee is also charged with maintaining liaison with the Emeriti/Retiree Relations Center, with recommending emeritus status for non-Senate academic retirees, and with editing and circulating commemorative statements for deceased members of the Los Angeles Division of the Academic Senate and for such non-Senate members as the Chancellor or President may request.

Conferral Requests/Recommendations

The committee received six applications requesting conferral of Emeritus status. They reviewed each applicant’s documents, supporting letters, and their respective departmental recommendations. The committee found that all the applicants fulfilled the criteria as established by the Guidelines for Emeritus Conferrals, and recommended to Vice Chancellor Thomas Rice that each of the following individuals be granted the Emeritus title:

1. Dr. Ellen Broidy, Librarian in Collections, Research and Instructional Services
2. Dr. Joseph Cooney, Clinical Professor in the School of Dentistry
3. Ms. Joan Flinto LoPear, Librarian in Cataloging and Metadata Center
4. Peter Blackman, Administrative Vice Chancellor
5. Joseph Mandel, Vice Chancellor of Legal Affairs
6. Michael G. Newman, Adjunct Professor of the School of Dentistry

The role of the committee in the conferral process came under scrutiny due to concerns of some members in cases of non-academic appointees. Until two years ago only academic appointees were considered with only rare exceptions. Through an initiative of the Office of the President several administrative titles were added as eligible for consideration of emeritus title conferral. Committee concerns centered on faculty members’ capacity to judge non-academic performance meritorious of the title. One member questioned the exclusiveness of the term “emeritus” accruing only to academics suggesting that it simply meant retired” and therefore was applicable to all retirees regardless of employment status. The issue was essentially tabled indefinitely when the members agreed that continued participation was warranted if only on the basis of prior committee commitment to participation in the non-academic cases.

A related issue arose with the previously unrecognized UC Bylaw 105.1, which confers Academic Senate membership on holders of several Administrative titles. A ruling was sought in the case of Vice Chancellors from the Committee on Rules and Jurisdiction and their decision affirmed Senate membership for all Vice Chancellors. This issue has been brought to the attention of appropriate local and UCOP administrators with reference to its implications for conferral of emeritus status. Since such conferral is automatic for retiring academic senate members the present process based on consideration of merit could be inappropriate.

Pre-Retirement Issues

The UEPRRC, in collaboration with the Emeriti/Retirees Relations Center and Campus Human Resources have held day long seminars for active faculty on a broad spectrum of retirement issues. Interested faculty across the entire campus had participated in one or another of these
seminars save for the Geffen School of Medicine and the School of Dentistry. Efforts by the previous UEPRRC chair to engage the Medical School in such a program had not come to fruition. The current chair along with the ERRC Director and the Benefits Director and the incoming UEPRRC chair met with the Provost and Senior Dean to discuss the potential for such a seminar. They agreed only to an hour long presentation of benefits information by the CHR personnel but declined any further involvement especially that and which might promote divisiveness between their Senate faculty and other faculty, e.g. maintenance of Senate privileges. It is suggested other campus units be considered for seminars in the 2007-08 year.

Other pre-retirement activities concern engagement with the Academic Senate’s development of a campus wide orientation for new and possible mid-career faculty including benefits issues and retirement related decisions which faculty must make.

**COMMITTEE GUESTS**

Guests of the committee included Academic Senate Chair Vivek Shetty, Vice Chancellor Thomas Rice, and Campus Human Resource representatives, Assistant Vice Chancellor Lubbe Levin, Director Lydia Oller, and Health Care Facilitator Bridget Sheehan-Watanabe. Their respective contributions are detailed below.

**Academic Senate Chair**

The committee greatly appreciated the cordiality with which Chair Shetty greeted the committee members. He stressed the Senate leadership’s willingness to articulate the positions of the committee to the chancellor and the Deans. He expressed appreciation of the unique role emeriti faculty play by virtue of their expertise drawn from experience and their potential for preventing Senate Leadership from making past mistakes. He acknowledged the continuing service on Senate committees given by emeriti. Committee members expressed their gratitude for the continued staff support now given the UEPRRC, which a few years ago was threatened with removal of that support.

**Health Care Plan Policies**

The above named CHR representatives spoke about Health Care Plan policies.

The committee suggested that Assistant Vice Chancellor Levin’s office distribute a document detailing: (1) the frequent problems retirees have faced and solutions to these problems, (2) other frequently asked questions. It was also suggested that the tips on the Health Care plan be placed in the Emeriti Newsletter.

Assistant Vice Chancellor Levin presented the HMO and POS/Plus Tips provided by her office. The eight tips for HMO carriers were: 1. New Members- PCP must be open and accepting new patients, 2. 1-800-UCLA-MD1 for referral to UCLA PCPs, 3. Member must live or work in PCP’s service area, 4. Family members can belong to different medical groups under one health plan, 5. Check ID card and call plan immediately if incorrect PCP or medical group is listed, 6. HMO changes outside of Open Enrollment for provider disruption issues only, 7. Keep records, receipts and authorization letters, 8. Save money on Rx by using mail order or UC pharmacies for 90 day supplies.

The three POS/Plus tips were: 1. Make sure services are referred/authorized when using HMO tier, 2. For in-network HMO tier, see HMO tips, 3. Keep out-of-network cost lower by using Blue Cross providers, 3. Save money on Rx by using mail order or UC pharmacies for 90 day supplies.

**Vice Chancellor Thomas Rice, Academic Personnel**

The Vice Chancellor Rice was reminded that his office and UEPRRC’s both handle Pre-Retirement issues and conferrals. Vice Chancellor Rice expressed interest in making the retirement process easier for the retirees. The committee informed him that one of the major
issues for the retired is office/lab space. Vice Chancellor Rice reported that his office annually sends a memo to encourage the Department Chairs to allocate space to the emeriti.

Grant Administration
Some Emeriti believe that the title “Professor Emeritus” is not taken seriously when applying to be a Principal Investigator on federal grants. There is language in the APM that allows the use of the title “Professor of the Graduate School” under certain circumstances; Berkeley presently uses this title. Academic Personnel is considering allowing the use of this title, they plan to consult with UEPRRC before it is implemented. The committee agreed that the “Professor of the Graduate School” title is something worth pursuing.

Healthcare
The committee informed Vice Chancellor Rice that it would be of mutual interest that the at least one of the offered health plans would provide faculty with the option of access to their own UC Medical Center and its faculty physicians. There have been efforts to address the gap, such as creating the Healthcare Facilitator position. The Faculty Welfare Committee has been consistent in addressing the issue; it’s not solely an emeriti issue. However, many emeriti have had very long and valued relationships with their faculty physicians. Even the Medical Center faculty members are concerned about their possible loss of access to themselves! It was suggested that the committee write a proposal and send it to the Administration. The committee discussed the benefits of the prior Faculty Liaison to Access and Streamline Healthcare Committee (FLASH). VC Rice agreed the FLASH Committee had provided many benefits and suggested that perhaps the UEPRRC might wish to pursue drafting a proposal for a replacement program.

Faculty Welfare Committee Survey
The committee reviewed the data from the Faculty Welfare Committee’s Faculty Welfare Survey. The Emeriti respondents accounted for 13% of all the survey respondents, which was more than the Associate Professors respondents; active full professors were 50% of the respondents. Twenty of the emeriti ranked primary care physician of choice as their first, second or third priority. Access to healthcare specialist or consultant of choice was ranked in the top three by 17%; while 12% ranked comprehensive benefits package as a top priority. Forty-Seven percent of the active faculty was concerned about faculty salary, while 11% concerned about benefits. The active faculty and the retired faculty are vested in the same priorities.

UEPRRC was well represented though the Faculty Welfare Committee especially with Professor Shane White as Chair. The committee appreciates the close cooperation with FWC and hopes that the relationship will continue.

CONTINUING ISSUES
In Memoriam Statements
There are 18 overdue statements: 3 from 2003, 3 from 2004, 3 from 2005 and 9 from 2006. There is information available for over half of the missing statements. In the past the overdue list stretched across a 10 years period; the oldest statement due is from 2003 is a grave improvement.

It was brought to the attention of the committee that there have been several deceased faculty members missing from the Senate’s “In Memoriam” list. The Senate receives death notices from the deceased’s departments, the Chancellor's Office and the Emeriti/Retiree Relations Center. Most families report deaths to UCOP first, at times UCLA does not hear of the death until much later.

Chair Giovannoni expressed her interest to implement a system where the committee would send a letter to a designated Emeritus faculty member from the deceased's department and a letter of solicitation to the department chairs. The Emeriti would offer their assistance to the department in writing the statements. The committee agreed some statements are difficult to write because no
one in the department is familiar with the deceased professor. In some departments the Chair assigns someone to write the statement but they forget about it.

Ms. Henderson has obtained a copy of the Oral History transcripts from the Library. The committee believes it might be source of information in developing the statements.

Dean’s Review Committees
An issue was raised concerning the participation of Emeriti in the review of the departmental Deans. The current practice is that only Emeriti who have been active in the departments within the last 5 years are invited to comment on the Deans performances.

Medicare Plus
Most of the medical information that the committee discusses pertains to the Medicare plus. There is a group of retirees that retired before 65 who are not Medicare eligible; the committee will actively pay more attention to this population’s issues. It was suggested that the Emeriti Association speak to Ms. Bridget Sheehan-Watanabe and put information in the newsletter that would be beneficial to them.

Conclusion
The work of the committee has been significantly enhanced by the active participation of the Chair of Faculty Welfare, Professor Shane White. He has kept us meticulously informed on all issues before the Faculty Welfare, especially the health care plans developments. He has also served as a very valuable and resourceful participant in the UEPRRC deliberations.

Finally, the committee is deeply appreciative of the excellent and indefatigable support we have received from Brandie Henderson in a myriad of ways without which we could not have functioned successfully.

Respectfully Submitted,

Joyce Appleby, History
Daniel Atkinson, Chemistry and Biochemistry, Chair, Emeriti Welfare Committee, Emeriti Association
Sachiko Cochran, Radiology
Seymour Feshbach, Psychology-Clinical, Past-President, Emeriti Association
Werner Hirsch, Economics
Herbert Kaesz, Chemistry & Biochemistry, President, Emeriti Association
Philip Levine, Classics
Eddie Murphy, Director, Emeriti Association
Robert Scott, President-Elect, Emeriti Association
Shane White, Faculty Welfare Committee, Chair
JEANNE GIOVANNONI, SOCIAL WELFARE, CHAIR

August 2007