

COLLEGES AND UNIVERSITIES AS MODELS, FACILITATORS AND CHAMPIONS OF TRANSFORMED RETIREMENT

Carole Goldberg

Vice Chancellor Academic Personnel, Emerita

Jonathan D. Varat Distinguished Professor of Law

UCLA

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- Reduced State Funding/ Tuition Pressures
- Growing Undergraduate Student Enrollments
- Limited Opportunities in Academia for Ph.D.s
- Need to Improve Diversity of Professoriate, Staff
- Growing Regulatory/Compliance Demands
- NEED TO DO MORE WITH LESS!

CHALLENGES FOR HIGHER ED

- Large Cohort of Baby Boomers
- Improved Health & Longevity
- Tenure
- No Mandatory Retirement
- Ph.D. group more diverse than current professors
- At UCLA
 - Generous Defined Benefit Retirement Plan
 - 250+ Senate Faculty (nearly 15%) with >35 Years of Service

GIVENS



BY RETHINKING FACULTY/STAFF RETIREMENT,
WE CAN –

- Open positions to an increasingly diverse cohort of university graduates AND STILL
- Retain prized talents, contributions, institutional knowledge of longtime employees who remain engaged

REALIZATION –
A MAGICAL RESOURCE

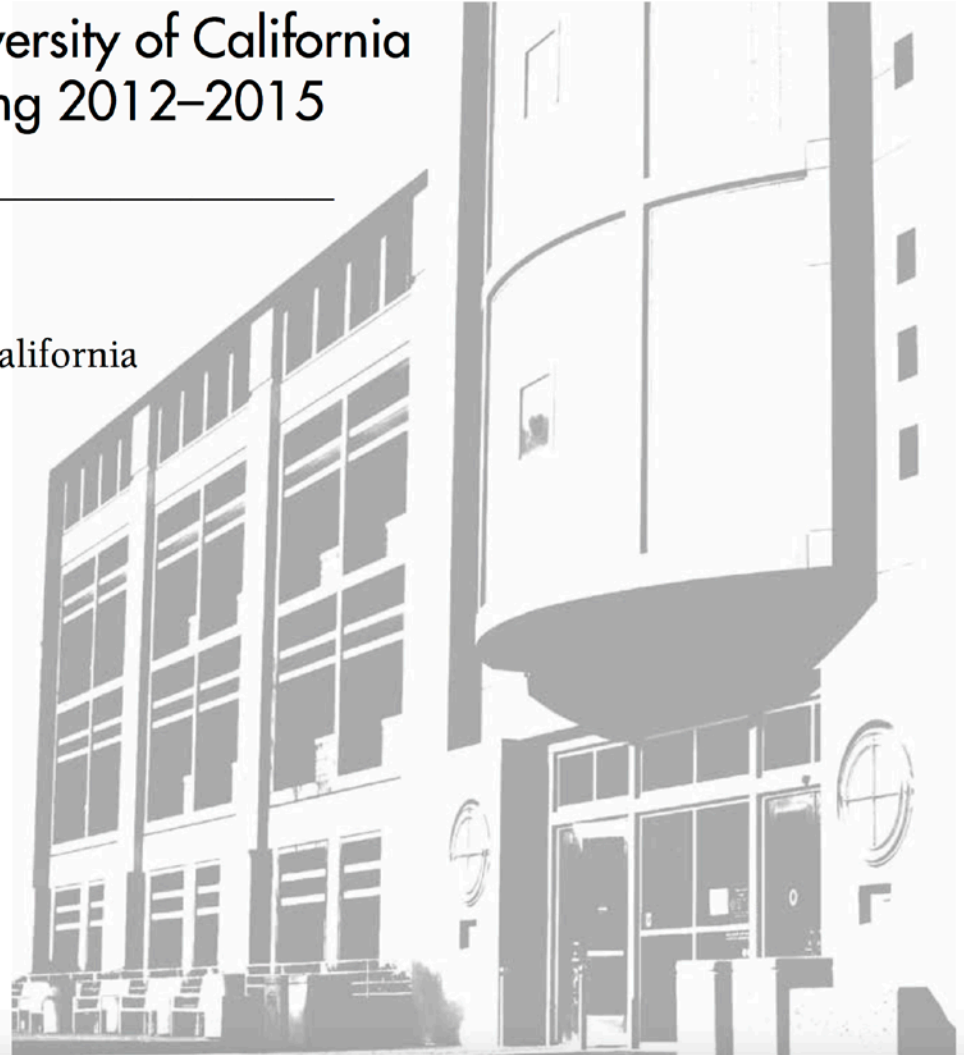
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A Virtual Eleventh Campus

An Inventory of University of California
Emeriti Activity During 2012–2015

CUCEA

Council of University of California
Emeriti Associations



- Financial concerns
- Psychological concerns/loss of identity
- Loss of resources to continue work
- Diminished commitment to subdisciplines

ACKNOWLEDGING REASONS FOR RELUCTANCE TO RETIRE



- Retirement isn't a severance of the relationship
- It's a RECONFIGURATION of the relationship

NEEDED: A RADICAL
RECONCEPTION

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- OLD ROLE
 - Financial counseling
 - Post-retirement programming
- NEW ROLE = OLD ROLE +
 - Educating faculty/staff about potential value of retirement
 - Providing real incentives for retirement, before and after
 - Providing greater recognition for value/contributions of emeriti and retirees
 - Creating real opportunities for faculty/staff to find fulfillment through contributions to the university

NEEDED: NEW VISION OF
UNIVERSITY'S ROLE



Professor Emeritus David Lopez named inaugural UCLA Faculty Retirement Liaison



David Lopez, Professor Emeritus of Sociology, serves as UCLA's first Faculty Retirement Liaison.

Appointed in April 2015 by Vice Chancellor for Academic Personnel Carole Goldberg, Professor Lopez advises and advocates for faculty members who are considering retirement as well as for those who have already retired. He helps faculty members plan for, structure and negotiate pre- and post-retirement arrangements with their departments, including Pathways to Retirement and other agreements, allocations of space and

access to the Research Professor working title for eligible emeriti. He also helps retiring faculty understand and navigate the University's general retirement process and system. Equally important, he advocates for continued and expanded emeriti faculty involvement in teaching, research and service across campus, as well as assisting individual emerita/us faculty in matters relating to their departments and schools.

In announcing this innovative appointment, Vice Chancellor Goldberg noted that "Professor Lopez' new position supports an important campus initiative to assist faculty in making continuing contributions to UCLA's research, teaching, and service missions post-retirement. Indeed, David's own service to the campus exemplifies the value emeriti can bring." Over his four decade plus career at UCLA, from Assistant Professor to Professor Emeritus, David Lopez has served in numerous administrative and Senate positions, including Associate Dean of Graduate Studies, Chair of Latin American Studies, Sociology Department Chair and as Chair of the Senate Council on Planning and Budget, the Emeriti Affairs Committee, and the Committee on Faculty Welfare.

David Lopez is available to Academic Senate faculty year-round throughout the campus by email at dlopez@ucla.edu and by phone at 310-210-1118.

STRATEGIES - EDUCATION

The Path Forward:

Workshops on planning for retirement and maintaining active professional engagement in emeriti status

Workshop I: Navigating the Dual Retirement Processes

Faculty Retirement Liaison discusses how to ensure successful transition to emeriti years; craft & negotiate with your chair the understanding under which you will retire

Workshop II: Continuing Professional Involvement after Retirement

Faculty from different disciplines share experiences, answer questions about continuing research, scholarly involvement, teaching & service into their emeriti years

Workshop III: Mechanics of the UC Retirement Process

Retirement counselors explain how to maximize benefits.

STRATEGIES – EDUCATION

- Pre-retirement: Pathways Agreements
 - Allows University, faculty member to plan
 - Provides transition-related benefits, pre- and post-
- Post-retirement
 - Research Professor working title
 - Office space policy
 - Endowed chair policy
 - Discounts (parking, Faculty Center, etc.)

STRATEGIES -- INCENTIVES



- Events: Reception at the Chancellor's House
- Displays: Emeriti art in the Vice Chancellor's Office
- Awards: For scholarship, teaching, service post-retirement

STRATEGIES -- RECOGNITION



- Recall for teaching, research, service
- Emeritcorp Mentoring Program for Associate Professors
- Inclusion in Senate, administrative leadership roles
- Work with programs such as Encore.org

STRATEGIES – FULFILLING
OPPORTUNITIES TO CONTRIBUTE



- Extend initiatives to staff as well as faculty
- Address university's relationship to retired faculty/staff who volunteer
 - Compliance obligations
 - Liability issues
- Extend services earlier in pre-retirement phase
- Expand post-retirement services connecting campus (and community) to retirees
- Greater recognition for the value provided by retirees

CHALLENGES AHEAD