DATE: May 13, 2020
FROM: Eric J. Barron
TO: Elizabeth M. Seymour

I have reviewed the Advisory and Consultative report, *Revision to AC-25 Emeritus Policy (Formerly HR25)* that was passed by the University Faculty Senate on December 3, 2019 and concur with the following report. By copy of this memo, I am asking Kathleen Bieschke, Vice Provost for Faculty Affairs, to implement the recommendation.

Thank you for the opportunity to review this item.

cc: Kathleen J. Bieschke
    Dawn Blasko
    Nicholas P. Jones
January 2, 2020

Eric Barron, President  
201 Old Main  
University Park, PA  16802

Dear President Barron:

The University Faculty Senate, at its December 3, 2019 meeting, passed the following Advisory and Consultative report:

**REVISION TO AC-25 EMERITUS POLICY (FORMERLY HR-25)**

Attached to this letter are the report from the Senate Agenda and the comments from the Senate meeting. We forward these recommendations to you for your approval and implementation.

Sincerely,

Nicholas J. Rowland, Chair  
University Faculty Senate

ENCLOSURE
SENATE COMMITTEES ON FACULTY AFFAIRS AND INTRA-UNIVERSITY RELATIONS

Revision to AC-25 Emeritus Policy (Formerly HR25)

(Advisory/Consultative)

Implementation: Upon Approval by the President.

Rationale
The committees acknowledge that “Emeritus Status is a privilege, not a right, and is given in recognition of sustained meritorious academic service to The Pennsylvania State University.” As such, AC-25, Emeritus Status (Formerly HR-25) includes a group of three eligibility requirements, the second of which stipulates that to be eligible for consideration of Emeritus Status, a faculty member must have held “any of the following ranks for at least five years prior to leaving the University:

- professor or associate professor
- professor of practice
- clinical professor or associate clinical professor
- librarian or associate librarian
- research professor or associate research professor
- teaching professor or associate teaching professor
- executive, associate dean, or director of an academic unit”

According to the history of the policy, AC-25 was most recently modified May 30, 2018 for “Editorial changes to update titles,” which are specified in the second eligibility requirement (above).

The relationship between title and rank has been the subject of considerable attention in the Senate of the past half-decade. Most recently, on April 23, 2019, Senate Committees on Faculty Affairs and Intra-University Relations delivered a report, “Revision to AC-21 “Definition of Academic Ranks,”” which clarified the relationship between title and rank. The report opened, stating:

The current version of AC-21 “Definition of Academic Ranks” (formerly HR-21) can be misconstrued with regard to the total number of ranks available to non-tenure-line faculty and the relationships between those ranks with regard to the role of terminal and non-terminal degrees.

Regardless of degree type, there are only three ranks and, thus, three titles available to non-tenure-line faculty.

Consider, for example, for “teaching faculty.” If the faculty member has a terminal degree, then the three titles available to them are:
“Assistant Teaching Professor” at the first rank,  
“Associate Teaching Professor” at the second rank, and  
“Teaching Professor” at the third rank.

In contrast, if the faculty member has a non-terminal degree, then the three titles available to them are:

- “Lecturer” or “Instructor” at the first rank,  
- “Assistant Teaching Professor” at the second rank, and  
- “Associate Teaching Professor” at the third rank.

There is a similar relationship for research faculty. If the faculty member has a terminal degree, then the three titles available to them are:

- “Assistant Research Professor” at the first rank,  
- “Associate Research Professor” at the second rank, and  
- “Research Professor” at the third rank.

In contrast, if the faculty member has a non-terminal degree, then the three titles available to them are:

- “Researcher” at the first rank,  
- “Assistant Research Professor” at the second rank, and  
- “Associate Research Professor” at the third rank.

There is also a similar relationship for clinical faculty. If the faculty member has a terminal degree, then the three titles available to them are:

- “Assistant Clinical Professor” at the first rank,  
- “Associate Clinical Professor” at the second rank, and  
- “Clinical Professor” at the third rank.

In contrast, if the faculty member has a non-terminal degree, then the three titles available to them are:

- “Clinical Lecturer” at the first rank,  
- “Assistant Clinical Professor” at the second rank, and  
- “Associate Clinical Professor” at the third rank.

This nuanced understanding of the concept of rank is not currently reflected in AC-25. Upon close examination, readers of the policy will note that titles not ranks are included and the distinction between terminal and non-terminal degrees is, thusly, ignored. These omissions, intentionally or otherwise, exclude individuals that the policy should not, in particular, faculty members without terminal degrees that were hired at the second rank or who were hired at the first rank and have achieved promotion.
The title “Assistant [Teaching, Research, Clinical] Professor” is currently not included as eligible for or worthy of consideration for emeritus status. This is because of the relationship between title and rank. All other eligibility requirements satisfied, the committees acknowledge that an “Assistant [Teaching, Research, Clinical] Professor” with a terminal degree has not achieved the second rank (either by hire or promotion), and, therefore, is not eligible for the privilege that is Emeritus Status. In contrast, all other eligibility requirements satisfied, the committees would be remiss not to acknowledge that an “Assistant [Teaching, Research, Clinical] Professor” with a non-terminal degree has achieved the second rank (either by hire or promotion), and, therefore, is eligible for the privilege that is Emeritus Status.

This is a concern because all of the other titles identified in AC-25 are all at the second rank or above. It is only fair to include and not exclude faculty members at the second rank with non-terminal degrees. In a closing remark, formerly ineligible faculty, considered ineligible based on previous title-based eligibility requirements, should be eligible based on revisions to the policy rather than the policy that they retired under, if this report should be supported by the Senate.

**Recommendation**

Recommended changes to AC-25 Emeritus Policy are as follows.

*Please note that the following contains bold text for additions and strikeouts indicating deleted text. Deleted text is noted with [Delete] [End Delete]. Added text is noted with [Add] [End Add].*

… any of the following ranks for at least five years prior to leaving the University:

- professor or associate professor
- professor of practice
- clinical professor[Add],[End Add][Delete] or assistant clinical professor with a non-terminal degree[End Add]
- librarian or associate librarian
- research professor[Add],[End Add][Delete] or assistant research professor with a non-terminal degree[End Add]
- teaching professor[Add],[End Add][Delete] or assistant teaching professor with a non-terminal degree[End Add]
- executive, associate dean, or director of an academic unit”

**SENATE COMMITTEE ON FACULTY AFFAIRS**

- Renee Bishop-Pierce, Chair
- Richard Brazier
- Julia Bryan
SENATE COMMITTEE ON INTRA-UNIVERSITY RELATIONS

- Elizabeth Boyer
- Anthony Buccitelli
- Madyln Hanes
- Robert Hoffman
- Maureen Jones, Chair
- Davis Kahl
- Kelly Karpa
- Kevin Koudela
- Janelle Larson
- Xin Liu
- Clifford Maurer
- Kevin McDade
- Karyn McKinney, Vice Chair
- Mari Pierce
- Paul Riccomini

- William Butler
- Gary Calore
- Alison Chetlen
- Ed Evans
- Beth Farmer
- David Fusco
- Julie Gallagher
- Leland Glenna
- Terrence Guay
- Kathryn Jablokow
- Rosemary Jolly
- Matthew Jordan
- Zuleima Karpyn
- Lisa Kitko
- Angela Linse
- Jonathan Mathews
- Rajen Mookerjee
- John Nousek
- Eric Novotny
- Laura Pauley
- Rosemarie Petrilla, Vice Chair
- Nicholas Pyeatt
- Richard Robinett
- Sue Rutherford Siegel
- Amit Sharma
- Stephen Snyder
- Emily Strohacker
- Bonj Szczygiel
• Martin Skladany
• Rajarajan Subramanian
• Paul Thompson
• Michael Tyworth
• Aiyana Southorland
• Samuel Bilotta
Excerpt from Senate Record

Revision to AC25 Emeritus Policy (Formerly HR25)

Maureen Jones, College of Health and Human Development: She’s super eager is all I’m saying. Renee’s a little bit too eager to not stand on that side is all I’m saying. So, this should be an easy one for us. Accidentally, when we looked at the change of rank and title in the emeritus policy, folks with a non-terminal degree are excluded in the language for this policy, and would, therefore, at the second rank or higher, not be eligible for emeritus.

So, our suggestion is that we just simply add– and if you’ll scroll to the very bottom for me. There’s lots of great language that was created ahead of this. However, the bottom line is that there are three things we want to add is the opportunity for an assistant clinical professor, assistant research professor– gosh, she’s good, right? Assistant teaching professor with a non-terminal degree to be eligible, because they would then be at the second rank or higher. Just the same as folks with a terminal degree. No changes here at all. It’s all then equitable and includes everyone in this conversation about achieving emeritus status.

Chair Rowland: OK.

Maureen Jones: All right. Good. We’re out. No. I’m just kidding.

Chair Rowland: Questions for Maureen?

Maureen Jones: Nicholas is paying attention.

Chair Rowland: OK. I see no questions already. Yeah.


Unidentified Senator: [INAUDIBLE]

Chair Rowland: Is that microphone working?

Maureen Jones: It is the combination of any of those ranks.

Unidentified Senator: [INAUDIBLE]

Maureen Jones: Right. So, you must hold those ranks as a chunk. And then you also always may then push it up the ladder if there’s any questions, to get a review of that. Am I correct in that?

Chair Rowland: Yeah. It does say hold any of the ranks for five years. So, you could be an associate professor of sociology, like I was, and then a full professor. As long as you’ve had those two for five years, you should be eligible, at least on account of that criteria.
Maureen Jones: [INAUDIBLE] appointed to the president. Things like that.

Chair Rowland: Kathy, did you want to comment directly? Yeah. Kathy, please.

Maureen Jones: Oh.

Kathleen Bieschke, Vice Provost for Faculty Affairs: I think that there is a way in which there are exceptions that can be made by the president. And in those cases where there is some wonkiness in terms of changing of AC21 that basically prevented somebody from achieving that rank, we would just take that under consideration.

Chair Rowland: That should dissolve over time too, as we stay in these ranks. And I hope we don’t change them soon.

[LAUGHTER]

Roger, last comment.

Roger Egolf, Lehigh Valley: My comment’s probably not necessary now with the verification.

Chair Rowland: Very good. Thank you. Are we ready to vote?

Maureen Jones: I was going to ask that. Yes.

Chair Rowland: Are we ready to vote?

Maureen Jones: Thanks, Kathy, for that one.

Chair Rowland: All right. Let’s move to vote now. To accept this motion, please press A. To reject the motion, please press B.

Anna Butler: On Poll Everywhere I have 20 accept and one reject.

Chair Rowland: OK. Good.

Paula Brown: In house we have 98 accept, 7 reject.

Chair Rowland: Very good. Motion carries. Thank you, Maureen. You may be seated. But Renee, you’re not off the hook yet.