

ANNUAL REPORT

University Standing Committee Lifelong Faculty Involvement

Academic Year Covered by Report: 2024-2025

Date Report Submitted May 2, 2025

Report Submitted by: Paul F. Williams

Number of times committee met 6

RECOMMENDATIONS

1. More concerted efforts made to encourage faculty, both tenure-track and professional, to seek emeritus(a) status at the time of retirement. For many colleges, recent yield rates of retiring faculty becoming emerita(us) are quite low. Increasing yield rates should be a priority.
2. Currently responsibility for seeking emeritus(a) status lies with the faculty member. Because emerita(us) status is granted only at the time of retirement (it cannot be applied for retroactively), the Committee suggests that such responsibility be that of the department head. Department heads should initiate a conversation with each faculty member planning to retire explaining the benefits of emerita(us) status and the process for applying for that status.
3. The Provost office should gather data each year on the number of retirees, the number of requests for emerita(us) status, and the number of retirees granted such status by academic unit. The data will help monitor the effectiveness of policies aimed at increasing the number of emeritus(a) faculty.
4. The Provost should provide low to zero marginal cost resources to emeritus(a) faculty supporting activities that contribute to the University's missions of teaching, research and service. Examples of low marginal cost resources might include the use of equipment that would otherwise be declared surplus, IT advice, statistical consultations.
5. Making the required changes to University policies pertaining to emerita(us) status required to implement the above recommendations.
6. The Lifelong Faculty Involvement Committee should continue working very closely with the Association of Retired Faculty to identify issues of concern to retired faculty and to develop strategies for increasing involvement of retired faculty in the life of NC State University.

SUMMARY OF DISCUSSION ITEMS/ACTIVITIES OF COMMITTEE

1. Discussed with the chair and co-chair of the Faculty Senate Personnel Policy Committee the issues of concern with which their committee was dealing to determine any mutual issues.
2. Discussed with Ms. Britt Moose the current status of health benefits for retirees. She provided an excellent presentation on the current benefits and the HR process by which retiring faculty procure those benefits.

3. Completed the retirement tips document begun by LFIC last academic year. It will be available on the Faculty Senate website. A copy of the document is provided as Exhibit 1.
4. The LFIC discussed at great length the issue of emerita(us) status upon which the above recommendations are based. We requested HR provide us with recent, five-year data on yield rates by college for emeritus(a) faculty as a proportion of total retirees. Those data appear in Exhibit 2. Exhibit 3 is a breakdown of the raw numbers on which the percentages in Exhibit 2 are based. It is evident there is great disparity across units in how many retiring faculty are receiving emerita(us) status. It is also the case that professional faculty achieve emeritus(a) status at a rate nearly half that of tenure track faculty. What the data do not indicate is whether the rates for each unit are driven by differences in standards for granting emerita(us) status, differences in the number who seek the status, or both. This lack of understanding how retirees become emeritus(a) faculty depending on their home unit is the primary rationale for our recommendation to begin a more systematic process of data collection and analysis.

**RECOMMENDATION FOR REVISION OF CHARGE AND/OR
MEMBERSHIP CONFIGURATION (if applicable): N/A**