MEMORANDUM

TO: Mānoa Deans and Directors

FROM: Robert Bley-Vroman
Interim Chancellor

SUBJECT: UH Mānoa Guidelines for Requests to Award Emeritus Title

September 3, 2014

SENT VIA EMAIL (PDF FORMAT)

Please see attached revised guidelines regarding requests to award emeritus title. There has been a change to a column title on the Request for BOR Confirmation of Emeritus/Emerita Awards Spreadsheet (attached) for ease of confirming years in rank. The column formerly was labeled “No. of Years in Professor Rank” and has been renamed to “Effective Date of Professor Rank” (please note that this spreadsheet should still be emailed to deenay@hawaii.edu).

Also, due to the Board of Regents, Personnel Affairs Committee needing to review the Emeritus/Emerita requests before they are submitted to the Board of Regents and to allow ample time for other BOR offices to review these requests, we are moving-up the submission date for emeritus/emerita requests to OVCAA from January 1st to December 15th for consideration at the March meeting and from July 1st to June 15th for consideration at the September BOR meeting. The eligibility criteria and privileges have not changed.

Attachment

c: Vice Chancellor Dasenbrock
   Interim Vice Chancellor Taylor
   Vice Chancellor Hernandez
   Vice Chancellor Cutshaw
   Assistant Vice Chancellor McCreary
   Director Kuniyoshi
UH MANOA GUIDELINES FOR REQUESTS TO AWARD EMERITUS TITLE

The emeritus title is an honor bestowed to well-qualified and eligible faculty by the Board of Regents (BOR) upon recommendation of the Chancellor and President. Executive Policy E9.209 (September 1990), outlines the current guidelines in awarding the title to retired rank 5 Mānoa faculty, including eligibility criteria and privileges.

Requests for emeritus titles shall be submitted in Action Memo format (http://manoa.hawaii.edu/chancellor/communications.html) to the Chancellor via the Office of the Vice Chancellor for Academic Affairs (OVCAA), who will act as the secretariat for this process for the Mānoa campus. Upon the Chancellor’s concurrence, requests will be forwarded to the President biannually for consideration and approval at the March and September BOR meetings. At this time, the BOR requires two (2) months for review and approval – as such, requests to the BOR via the Chancellor must be submitted to the OVCAA by December 15 for consideration at the February/March meetings and by June 15 for the August/September meetings.

The Mānoa procedures are as follows:

*Eligibility.* Faculty who have retired from UH Mānoa with five (5) or more years of full-time service at rank 5 are eligible.

*Identification.* Upon retirement of the faculty member, Deans and Directors are requested to determine eligibility for emeritus status and to send a request via the respective Vice Chancellor to the Vice Chancellor for Academic Affairs. Please also note that an individual may be awarded only one (1) emeritus/emerita title from the University. The request for emeritus title should be made after the retirement date and include the recommendation of the nominee’s department and the Dean/Director. Along with the request memorandum, please attach the following:

1) copy of the Personnel Notification Form (PNF) verifying the person’s service at rank 5 status for five (5) or more years;
2) a copy of the signed PNF showing the retirement status and date
3) emeriti candidates most current mailing address
4) Request for BOR Confirmation of Emeritus/Emerita Title Awards spreadsheet (emailed to deenay@hawaii.edu)
Please submit the BOR request memorandum and related documents by December 15 for consideration at the February/March meetings and by June 15 for the August/September meetings.

Recommendations. Upon receipt and review of the documents, the Vice Chancellor for Academic Affairs will make a recommendation to the Chancellor. The Chancellor will review and if Chancellor concurs, will make a recommendation to the Board of Regents via the President biannually, for consideration and review at the appropriate BOR meetings for those retirees recommended by their unit.

Notification. Upon BOR approval, the Chancellor will notify the individuals approved for emeritus title via letter advising on the campus privileges associated with the emeritus status.

Exceptions. On an exception basis, Deans and Directors may propose emeritus status for retired faculty who do not hold rank 5 status or lack the required 5 years. This request should be accompanied by the recommendations of the department and Dean, and a curriculum vitae if appropriate. Each case will be considered separately on its merits, and if Chancellor concurs, will be transmitted to the Board of Regents as an exception to BOR policy.

Your assistance to ensure compliance with Executive Policy E9.209 and Manoa guidelines pertaining to requests for awarding emeritus title is appreciated. Should you have further questions, please contact the Office of the Vice Chancellor for Academic Affairs at 956-8447.
(1) The University of Hawai‘i’s Tax Deferred Annuity Program is established for the benefit of eligible employees who elect to purchase 403(b) annuity contracts and/or establish 403(b)(7) custodial accounts.

(2) Participation in the University’s Tax Deferred Annuity Program shall be in accordance with the requirements of the Federal Internal Revenue Code and Hawai‘i Revised Statutes and the University’s plan document.

(3) The President or designee shall be authorized and responsible to amend or update the program; ensure compliance with applicable regulatory and statutory provisions; for establishing procedures to administer the Tax Deferred Annuity Program, and authorize service providers from which employees may purchase 403(b) annuity contracts and/or establish 403(b)(7) custodial accounts.

c. Emeritus/Emerita Title.

(1) The emeritus/emerita title is an honor bestowed by the Board upon retiring or retired faculty members in recognition of dedicated and honorable service rendered to the University and to vice presidents and chancellors who have made exceptional contributions to the University and provided long and distinguished service, and who are recognized as distinguished leaders in their profession.

(2) The emeritus/emerita title is conferred, upon recommendation of the President, to those persons retiring from the University with the rank of full professor or its equivalent, or service in the position of vice president or chancellor for five or more years to the University at that rank or position.

(3) Individuals holding equivalent or higher positions, who report to the Board may be considered by the Board for the emeritus/emerita title using the above criteria.

(4) An individual may be awarded only one emeritus/emerita title from the University.

d. Exemptions from tuition and other fees. (see Section 6-4e)

Section 9-12 Executive and Managerial Personnel Policies.

The Executive and Managerial Personnel Policies shall govern the executive and managerial personnel system for individuals appointed to executive and managerial positions which are excluded from an appropriate bargaining unit. These policies, including the classification and compensation plan, the recruitment and appointment of personnel, the conditions of service and other provisions, are contained at the end of this chapter.