



SENATE POLICY:
O - 250

OKANAGAN SENATE
3333 University Way
Kelowna, BC V1V 1V7

Number & Title

O-250: *Emeritus Status*

Effective Date:

20 May 2021

Approval Date:

20 May 2021

Review Date:

This policy shall be reviewed five (5) years after approval and thereafter as deemed necessary by the *responsible committee*.

Responsible Committee:

Learning & Research Committee of the Okanagan Senate

Authority:

*University Act,
S. 5(1)*

“The convocation of a university is composed of the following persons:

- (f) all persons whose names are added to the roll of the convocation by the senate;*

S. 9

- (1) The senate is to make rules governing procedure for the transaction of business by the convocation.*
- (2) The senate may add names to the roll of the convocation under section 5.*

S. 37(1)

The academic governance of the university is vested in the senate and it has the following powers:

- (b) *to establish committees it considers necessary and, by 2/3 vote of its members present, to delegate to one or more committees those of its powers as it may determine*

Purpose and Goals:

This policy outlines the criteria for granting or revoking emeritus status.

Applicability:

This policy is applicable to employees of the *University* who retire or resign while holding tenured appointment as a Professor, Professor of Teaching, Associate Professor, Assistant Professor, Senior Instructor or a confirmed appointment as a General Librarian or Administrative Librarian.

Exclusions:

None.

Definitions:

None.

Policy:

- (1) To be eligible for emeritus status, an individual must:
- a. Have a combined age at retirement/resignation plus years of full-time service to the *University* of 70 or more;
 - b. Have held a full-time tenured position at the rank of Professor, Professor of Teaching, Associate Professor, Assistant Professor, Associate Professor of Teaching, Assistant Professor of Teaching or Senior Instructor. Librarians must have held a Confirmed appointment; and
 - c. Not be retiring or resigning from the *University* in order to take up a faculty appointment in another university. If an individual is retiring or resigning from the *University* in order to take up such appointment, he or she may be considered for emeritus status once he or she has retired or resigned from that or any other such subsequent appointment.
- (2) Emeritus status shall generally result in a title that corresponds with a person's rank and appointment at the time of retirement or resignation with the word "Emeritus" or "Emerita" (at the individual's preference) added thereafter; however, a retiring or resigning employee may specify a previously-held appointment (e.g., in another department or discipline) if he or she views it as more appropriate.

Should a person eligible for emeritus status have also held an administrative

position as a President, Vice-President, Registrar, or Dean of the *University*, they shall have the option of specifying this title as the basis of their emeritus title in lieu of the title corresponding to their academic appointment at the time of retirement or resignation.

- (3) At the completion of their final term of office, a former chancellor shall automatically be granted emeritus status and the rank of Chancellor Emeritus.
- (4) Individuals who did not meet the meet the eligibility for emeritus status set out in Section 1 at the time of their retirement or resignation, but who subsequently do so may apply for the status to be granted.
- (5) Senate, at its discretion, may decide under exceptional circumstances, not to grant emeritus status or to revoke emeritus status from an individual.
- (6) The *responsible committee* shall establish procedures under this policy for the recommendation and consideration of emeritus status and for appealing a negative recommendation.

Calendar Statement:

There are no calendar statements under this policy.

Consultations

The following groups have been consulted during the development of this policy:

Human Resources; Deans, Directors, and Heads; Students Union
Okanagan; Disability Resource Centre; Centre for Teaching and
Learning; AVP Students; Academic Advising; Enrolment Services;
Office of the Ombudsperson for Students; University Library; Office of
the Provost; and Office of University Counsel.

History:

This is the second version of this policy. The first was dated April 2014.

Related Policies:

None

Appendix:

There is no appendix to this policy.

Procedures:

1. In May and December of each year, Faculty Relations will forward a list to the Deans of Faculties and the University Librarian via the Registrar of the retiring or resigning faculty member/librarian who meet the combined age and service requirement set out in Section 1 of the Policy. Deans and the University Librarian will forward the list to the Heads of departments of the retiring or resigning faculty member/librarian.
2. Heads, upon consultation with tenured and tenure-track faculty members of their department or, in the case of librarians, confirmed and confirmation-track librarians, will provide a recommendation on emeritus status to the Dean or the University Librarian. The Dean or the University Librarian will review the departmental recommendation and provide a recommendation to the responsible committee.

Upon *responsible committee* recommendation, a list of individuals eligible for emeritus status will be forwarded to *Senate* for approval.
3. Following *Senate* approval, the Registrar shall notify individuals of their emeritus status by letter and add all emeriti to the Roll of Convocation.
4. Should a faculty or the *responsible committee* decide not to recommend an individual for emeritus status – or recommend their status at a rank or title they do not consider appropriate – they may appeal that recommendation to the Provost who shall review the matter and make whatever recommendation to the *Senate* he or she considers appropriate.
5. The *University* is not obliged to offer any privilege or benefit to those with emeritus status; however, it recognizes the following traditional benefits:
 - a. Complimentary parking on campus (taxable benefit)
 - b. Free library card
 - c. Tuition waivers for Emeriti under age 65 (any BC resident age 65 or older is eligible for free tuition)
 - d. Tuition waivers for dependent children
 - e. **Internet and email services**
 - f. Office and/or Research space (as available, subject to Department approval and arrangements)
 - g. Membership in the Association of Professors Emeriti