

# Dartmouth Faculty of Arts & Sciences Retirement



Handbook & Guidelines

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## **Choosing to Retire**

### **Retirement Options**

Faculty may retire from the College in two different ways:

1. A straight retirement occurs when a faculty member informs the relevant Associate Dean of their decision to retire effective of a certain date. Faculty should initiate this process by informing the department/program chair and Associate Dean of their plan to retire in writing. After doing so, the faculty member contacts the Payroll Office and the Office of Human Resources to receive and complete the appropriate paperwork. Please note that straight retirements must take place on June 30 of a given academic year. Any departure from a June 30 retirement date must be approved by the Associate Dean. Such approval is required because free term salary payments constitute an advance on teaching and research for the remainder of the academic year.

A [Flexible Retirement Option \(FRO\)](#) allows faculty to make a gradual transition from full-time employment to full retirement. In FRO, a faculty member performs the equivalent of one year of full-time service and teaching over a period of three years, while receiving a more than proportional amount of salary for three years. Please see the section on FRO in the [Faculty Handbook](#) for additional information about eligibility requirements and salary calculations. The FRO program is administered by the Benefits Office, which publishes an annual [Fact Sheet and Program Description](#). Faculty with questions about how to apply the terms of the program to their individual circumstance should consult the Assistant Dean for Faculty Affairs. To participate in the FRO, an agreement must be reached with the Dean of Faculty by March 31. The following individuals will be informed of the formal FRO agreement: the Associate Dean, Division Coordinator, Department/Program Chair, Assistant Dean of Faculty Affairs, Chief Finance and Operations Officer, and the HR Retirement Plan Administrator.

### **Retirement HR Benefits**

When a faculty member enters retirement/end of FRO, Human Resources provides support for updating and/or transitioning medical and dental insurance, life insurance and flexible spending accounts. A breakdown of retiree health benefits is available online [here](#). You may also visit [dartgo.org/Retirees](http://dartgo.org/Retirees) for additional benefit information. At the time of retirement, HR also provides a document outlining benefits for that year.

If you have specific HR questions regarding benefits and retirement plans, you may contact your [HR Benefits Team](#).

## **Emerit Status**

The [Faculty Handbook](#) (section 10) describes emerit status and its corresponding benefits in the following way:

At the end of an academic career, upon the retirement of a voting member of the faculty, the Board of Trustees, acting on the recommendation of the Dean of the Faculty of Arts and Sciences, may grant emerit status to individuals holding the rank of Assistant, Associate, or Full Professor. These individuals are faculty members who have rendered distinguished service to Dartmouth, normally for a period of at least ten years. This designation is not automatic. The process commences with the tenured members of the department/program(s) voting to grant emerit status. The department/program Chair(s) will communicate the result of the vote to the Associate Dean(s) who will then determine whether to recommend emerit status to the Dean of the Faculty. Upon approval of the Dean's recommendation by the Board of Trustees, individuals may use the title modifier that they prefer (Professor Emerit, Emeritus, Emerita, or a similar variation).

The privileges and benefits of emerit status include discounted tickets to athletic and cultural events; the ability to purchase computer equipment at discount through the Dartmouth Computer Store; the ability to purchase a parking permit; library privileges; access to computing facilities for professional activity; access to athletic facilities on the same basis as active faculty members; and a subscription to some of the College's publications, such as Dartmouth Life. Professors with emerit status may obtain a Dartmouth identification card through the Human Resources Office.

As emerit status must be granted by the Board of Trustees, it is recommended that faculty who seek emerit status begin the process at least six months prior to the formal retirement date.

The Board of Trustees also grants emerit status to administrators who have worked at the College for over 20 years and who have demonstrated "extraordinary commitment to the College and positive institutional impact." The details of this decision and policy are available [here](#).

## **Benefits of Emerit Status**

Faculty who are granted emerit status will maintain email, library and gym privileges. Emerit status does not guarantee that the faculty member will be provided with an office. There are occasions where a department/program has an available office and wishes to provide that office to an emeritus/a faculty member (or to be shared by emeriti) on a temporary basis. This decision is made by the department/program chair but can be superseded by the Associate Dean of the Faculty. Faculty with emeritus/a status have no teaching, research, advising, mentoring, or

administrative obligations. However, they should conduct themselves professionally in the same manner as they did when they were employed by the College. Emerit faculty are recorded in the [ORC](#).

### **Professional Affiliation**

Faculty who held an endowed chair upon retirement may continue to list that endowed chair on letterhead by placing "emerit" after the endowed chair title, once emerit status has been formally granted by the Board of Trustees.

### **Computer Help and Services**

For the purposes of access to institutional subscriptions, IT support, and Computer Sales and Services, there remains a clear distinction between a "retired" faculty member and an "emerit" faculty member. Emerit faculty retain their NetID accounts within Dartmouth's network, as this account acts as the gateway to all authenticated pages and systems including, but not limited to, email access, IT service portals, computer sales, institutional software subscriptions (e.g., online Microsoft Office suite), VPN access, and institutional subscriptions to journals and other media. Retired faculty (non-emeritus/a) maintain their NetID account for 30 days after the date of retirement as recorded by Human Resources; after 30 days, all access terminates. (Note: Access to Employee Self Service remains active for 18 months after termination, resignation, or retirement.)

For more information on emerit NetID accounts, see the ITC service document [here](#).

For emerit faculty who retain a NetID and thus retain access to Dartmouth systems, limited IT support *for Dartmouth supported services and applications* is available *if support is requested in service of research and continuing professional engagement with the College*. Priority within the ITC service ticket system will be set below active student, faculty, and staff requests.

In any terms an emerit faculty member is employed by the College as a lecturer or researcher, their priority is set as "active faculty."

A general description of support offered by the ITC Service Desk is available [here](#).

### **Library Services**

Library privileges are determined by status with Dartmouth systems. Retired faculty (and all community members) retain public access to Dartmouth collections. Emerit faculty retain library borrowing and request privileges. Retired faculty employed by the College for teaching or research are considered active "faculty" or "staff" for the duration of their employment.

### **College-managed Email and Storage**

As outlined above, retired faculty maintain access to Dartmouth systems, including email and storage (e.g., Google Drive, OneDrive, DartFS) for 30 days after retirement whereas emerit faculty continue to have access to email and storage via their NetID account.

[ITC Support Services](#) is willing to provide support in transferring *personal* data from College-managed storage before the 30-day window expires.

It is important to note that data, including emails within Dartmouth accounts, are subject to the rules that govern the College as an institution and are not considered "private." It is best practice to separate personal and professional emails into personal/private accounts and a Dartmouth institutional account. This is especially true at and around retirement when these files must be teased out and separated from one another.

### **Institutional Subscriptions**

The College does not pay for the cost of individual subscriptions. Institutional subscriptions bound to NetID accounts *do* persist for emerit faculty. A VPN may be required when using off-campus networks.

### **Internet Service Operating Systems (ISOS)**

The College does not pay for the cost of ISOS either for retired faculty or for emerit faculty (excepting periods when an emeritus/a faculty member is actively employed by the College, see "continued engagement" below).

## **Transitioning out of the College**

### **Moving out of Faculty Office**

If faculty members are not able to move all of their personal belongings, they may seek assistance from the department/program chair who can consult with Facilities, Operations & Management (FO&M).

Funded by department/program chair string, FO&M will drop off large totes and items for garbage and recycling and will move items from one place on campus to another place on campus. FO&M will **not** pack or move items off campus or to a private residence.

Dartmouth libraries accept book donations on a limited basis. Currently, library staff evaluate all gift books the same way as it considers titles that they would consider purchasing, ensuring that they support the current curricular and research needs of the college. If a faculty member is interested in donating books, they should refer to the current guidance on the libraries [gifts page](#).

### **Research Projects and Intellectual Property**

In most cases, part of the time spent during FRO (if elected) involves the closing down of research labs and/or the drawing projects to a close. Some projects and their grants extend beyond the point of retirement. In those cases, grants must be transferred to another Principal Investigator (PI) who remains an employee of the College.

As described on the [Office of Sponsored Projects \(OSP\)](#) website, "Grants and contracts are awarded to the institution, Dartmouth College. As such, the transfer process involves institutional approvals and it is important that the PI work closely with their Department Chair, Department Manager, Dean's Office and OSP to discuss each award contemplated for transfer. All parties should be part of the process and agree upon the appropriateness and feasibility of the transfer and understand the implications. Other Dartmouth offices (e.g. CPHS, EHS, Procurement) may need to be informed as well, in accordance with their procedures and policies."

OSP provides guidance for the transfer of grants and equipment [here](#). Their office also offers a checklist that guides faculty through the process. This [guide](#) provides links and information to other relevant offices including DRA, EHS, CPHS, IACUC, TTO, etc.

The Dartmouth [Tech Transfer Office \(TTO\)](#) is responsible for patents, licensing, and transfer of intellectual property. Upon retirement (and as the information changes), TTO should be notified of current contact information in case they should need signatures for patent matters or to send revenue from IP; in addition, they may reach out should they need to find lab notebooks and research results.

## Research and Other Funds

IRR, SRR, Chair account funds, and any other Dean of Faculty Research account funds remain available to retiring faculty during the FRO period. Once faculty are formally retired, these funds revert back to the Dean of Faculty Office budget.

## College-owned Property and Supplies

Equipment purchased using Dartmouth College funds is considered by the IRS, and the College itself, to be the property of Dartmouth College, (see [Computer Transfer Policy](#)). Upon your retirement, faculty will have several options available to you regarding the transfer of equipment:

- A. Faculty may purchase the equipment from the College at the fair market value for personal use.
- B. Faculty may request to the Associate Dean that the equipment be gifted to them by the College for personal use. Note, if approved, the College is required to report it as taxable income to a faculty member at fair market value.
- C. Faculty may return the equipment to the College.

If a faculty member plans to continue using the equipment for Dartmouth-related activities during their emerit status, they will need to respond to Information, Technology and Consulting (ITC) with the following for our records:

- Business Purpose and Benefit to Dartmouth
- Purpose End Date

For questions on equipment policies, please contact the [Arts & Sciences Finance Center](#).

When a Dartmouth-owned computer becomes a personal machine, it should be wiped to factory settings with personal data transferred back to the personal machine. Note: Dartmouth-owned software and licenses (including Microsoft Windows and Microsoft Office) *are not* part of the purchase when an institutional computer becomes personal.

All College-owned property remains with the College and must be retained. This includes laboratory equipment, supplies, and animals (all of which should be transferred in accordance with the [guide](#) provided by OSP and by communication with the relevant offices). This also includes books, journals, lab notebooks, and other



research materials which, at the very least, must remain accessible to the College and should be cataloged by the [Tech Transfer Office](#).

### **Records, Materials, and Documentation**

The following documents are considered College Records and are often in the possession of faculty, therefore, they are subject to retention periods and destruction afterwards is required:

- Advising records (3 years after graduation or 7 years after last student activity, destroy)
- Correspondence, including email, that pertains directly to College business activities and decisions (3 years from creation date, destroy)
- Correspondence not related to College or mass email announcements (destroy when no longer needed/useful)
- Graded material (1 year after administered, destroy)
- Class Recordings (1 year from end of term, recommended)
- As the instructor you own the copyright to your course materials, of which these recordings constitute a part. You have the opportunity to retain any recorded content that you feel has potential value for future re-use. However, if the recording includes students speaking, asking questions, making presentations or otherwise participating in the course in any manner that makes it possible to identify the student, the segments containing recordings of the student do constitute protected educational records. Such educational records can only be used as permitted by FERPA or in a manner allowed by written consent from the student.
- Research data generated while individuals are pursuing research studies as faculty, staff, or students of Dartmouth, and data generated by visiting scholars utilizing the facilities of Dartmouth are to be retained by the institution for a period of three (3) years after submission of the final report on the research project for which the data were collected, unless a longer period is specified by the sponsor. [Data Retention Policy](#)
- Event records: files from conferences, seminars, or workshops that were hosted and/or grant-sponsored at Dartmouth (3 years from event date, destroy)
- Faculty committee records (3 years from committee meeting date or creation date, transfer to College Archives)

### **Non-Records**

Non-records include material created by faculty as part of their teaching responsibilities as well as material related to non-grant funded Dartmouth research, and materials related to non-Dartmouth professional activities. Scholarly files are also the personal property of the faculty member. For further information regarding what scholarly work may be of interest to Rauner Special Collections Library please see the Library's collecting policy for [Dartmouth Associates](#) and the [Manuscripts Selection Policy](#).

## **Advising Commitments**

During the FRO transitional retirement period, retiring faculty are no longer obligated to advise undergraduates in the Pre-Major Advising program (unless the faculty member wishes to continue advising and confirms this with the Assistant Dean of Undergraduate Advising).

For graduate and PhD students, in most cases retiring faculty have begun the process of ramping down their research labs and advising in anticipation of retirement. In the rare cases where graduate and PhD students require reassignment, the Guarini School will work with faculty and students to find suitable arrangements.

## **Questions pertaining to Social Security, Medicare, Tax Status**

Questions about Social Security and Medicare should be directed to the [Human Resources Retirement Plan Administrator](#). The College does not provide guidance on tax issues and questions should, therefore, be directed to the faculty member's personal accountant.

The [Faculty/Employee Assistance Program](#) (F/EAP) provides limited legal support and financial information (among other services). F/EAP is available for as long as one is employed by the College with fringe benefits, but access ends upon retirement.

## **Employment Status**

Retired faculty, even those with emerit status, are not considered employees. If a retired faculty member is engaged in activity such as teaching or working on a research grant where compensation is provided, the faculty member is considered an employee for the duration of that activity.

## **Continued Engagement with the College**

### **Teaching**

When there is a desire on the part of both the faculty member and the department/program, retired faculty may continue teaching as long as they are in a non-benefits eligible role (i.e., less than half-time and less than 9 consecutive months).

### **Research**

Some faculty may continue working on federal research following retirement with the approval of the Associate Dean. For ongoing projects and grants, OSP and TTO are able to assist in the transfer of PI status to another faculty member in addition to

supporting the process of becoming a Co-PI in retirement. For budgetary matters and recognition of connection to the College, an emerit professor may be named a "research professor." This should be negotiated with the department/program Chair and the relevant Associate Dean, or Dean of Faculty.

For the creation of new grant-funded research, emerit faculty should be in touch with their Chair and Associate Dean for appointment as "research professor" to demonstrate relationship to the College in grant proposals.

### **Advising**

Retired/emerit Faculty may be interested in and asked to serve on a dissertation committee. Such a request requires approval of the department/program chair and Associate Dean.

Faculty may be interested in continuing to advise undergraduates. Such a request requires the approval of the [Assistant Dean of Faculty for Undergraduate Advising](#).

### **Department/Program Websites; Dartmouth Directory**

Department web pages are managed by each academic department/program. The Associate Dean has oversight of these web pages. For emerit faculty who wish to maintain their faculty page online, they should work with their department/program administrator for help with accessing personal pages.

Emerit faculty continue to appear within the Dartmouth Name Directory (DND) with the affiliation: E-FAC.

### **Obligations for Continued Engagement**

Emerit faculty who come to campus must follow all campus safety guidelines, including testing protocols, vaccination requirements, etc.

All emerit faculty who also hold lecturer or research appointments with the College should continue Title IX online training if they have contact with students.

Emerit faculty who are using college facilities should report on their professional activities to their department/program chair.

### **Obligations for Professional Conduct**

Emerit faculty, while not employees of the College, are required to maintain the standards of professional conduct that apply to all faculty in the Arts & Sciences. These standards of conduct appear in the [Faculty Handbook](#) (Section 8). Failure to maintain these standards may result in the termination of Emerit status and privileges to remain on Dartmouth's campus.