Dartmouth
Faculty of Arts & Sciences
Retirement



Handbook & Guidelines

October 2026

Table of Contents

Choosing to Retire 3
- Retirement Options 3
- Retirement HR Benefits 4

Emerit Status 4
- Benefits of Emerit Status 5
- Professional Affiliation 6
- Computer Help and Services 6
- Library Services 6
- College-managed Email and Storage 6
- Institutional Subscriptions 7
- Internet Service Operating Systems (ISOS) 7

Transitioning out of the College 7
- Moving out of Faculty Office 7
- Research Projects and Intellectual Property 7
- College-owned Property and Supplies 8
- Records, Materials, and Documentation 9
- Non-Records 9
- Advising Commitments 10
- Questions pertaining to Social Security, Medicare, Tax Status 10
- Employment Status 10

Continued Engagement with the College 10
- Teaching 10
- Research 10
- Advising 11
- Department/Program Websites; Dartmouth Directory 11
- Obligations for Continued Engagement 11
- Obligations for Professional Conduct 11

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 who are planning to retire are encouraged to consult with their Associate Dean and/or with the Assistant Dean for Faculty Affairs well in advance to ensure that they are fully informed of all relevant considerations. They may also wish to consult the Benefits Office and Human Resources.

   The effective date for retirements is June 30. Any other retirement date must be approved in advance by the Dean of Faculty. Note that the deadline for a department/program to provide a written recommendation to the Associate Dean for emerit status is April 30 (details below).

   Once a faculty member has decided to retire, they should complete the following steps:

   1. Initiate the retirement process by informing the department/program Chair and Associate Dean of their plan to retire in writing.

   2. Contact the Payroll Office (aspay@dartmouth.edu) and the Office of Human Resources (arts.and.sciences.hr@dartmouth.edu) to receive and complete the appropriate forms.

2. Dartmouth provides a Flexible Retirement Option (FRO) that is designed for eligible faculty members who desire to make a gradual transition from full-time employment to retirement over a period of years. The FRO program allows an individual and Dartmouth to agree that the individual can perform the equivalent of one year of full-time teaching over a period of three years, while receiving a more than proportional amount of salary for three years. Subject to the needs of Dartmouth, there may also be an opportunity to perform additional services for additional compensation from Dartmouth. In addition to the FRO Base Salary, additional compensation may be earned while on FRO, according to established policies. The participant is not restricted from working outside Dartmouth for the three-year period.

   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 May 15. Faculty may consult with the Assistant Dean of Faculty Affairs for guidance but must meet with the Dean of Faculty to finalize the terms of the FRO agreement.

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 and additional benefit information is available online here. 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:

> Upon the retirement of a voting member of the faculty, the Board of Trustees may grant emerit status to individuals holding the rank of 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.
>
> Emerit status is not automatic. The process begins with a request from the retiring faculty member to their department/program Chair(s). The Chair(s) then hold a meeting with the tenured members of the department/program(s) to discuss the retiring faculty member's career contributions and to vote on the request for emerit status. The department/program Chair(s) then provide to the Associate Dean(s) a letter detailing the faculty member's career contributions and the vote tally. The Associate Dean determines whether to recommend emerit status to the Dean of the Faculty. The Dean of the Faculty then makes their recommendation to the Board of Trustees. 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).
>
> Since emerit status must be granted by the Board of Trustees, faculty who seek emerit status should begin the process at least six months prior to the formal retirement date. Faculty already on FRO should begin the request process in January of their final year. In order to be considered for emerit status prior to the end of an academic year, the deadline for department/program Chairs to submit a recommendation for emerit status (one that has already been approved by department/program vote) to the Associate Dean is April 30. This is the final deadline for the academic year, unless special arrangements are approved by the Associate Dean. Chairs can submit the recommendation at any time and are encouraged to do so sooner.

Timeline Summary:

1. January of final FRO year or academic year of planned retirement: faculty member begins emerit request process by submitting letter of request to dept/program chair.

2. Between January and April: Tenured members of dept/program meet to deliberate and vote on recommending emerit status.

3. April 30: Last date for Dept/Program Chair to submit their letter recommending emerit status to the Associate Dean. The letter must detail the retiring faculty member's career contributions and the vote tally.

4. Upon receipt of the recommendation, the Associate Dean initiates the internal conduct records review in accordance with Dartmouth policy.

5. Following the review, the Associate Dean makes their recommendation to the Dean of Faculty.

6. The Dean of Faculty makes their recommendation to the Board of Trustees.

The Board of Trustees also grants emerit status to lecturers and 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. For more information about emerit status for staff, please contact the Assistant Dean for Faculty Affairs.

Benefits of Emerit Status

The privileges and benefits of emerit status, detailed below, 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. Professors with emerit status may obtain a Dartmouth identification card through the Human Resources Office.

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 emerit 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 emerit 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-emerit) 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) 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 emerit 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 chart 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.

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 Principal Investigator work closely with their Department Chair, Department Manager, Dean's Office and OSP to discuss each award contemplated for transfer."

OSP provides guidance for the transfer of grants and equipment here. The PI Transfer

Guide provides a checklist that guides faculty through the process, including 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.

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. Faculty with ongoing research plans may request permission from their Associate Dean to continue using these funds for up to five years after retirement: Retired Faculty Equipment and Funding Form.

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 retirement, faculty will have several options available regarding the transfer of equipment:

A. Faculty may purchase the equipment from the College at fair market value for personal use, with the exception of computers purchased within one calendar year of retirement.

B. Faculty may request to the Associate Dean that the equipment be gifted to them by the College for personal use, with the exception of computers purchased within one calendar year of retirement.

   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 by

ITC 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 PI Transfer 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 at the end of the retention period 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, destruction 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 retention period is specified by the sponsor. Records Retention and Destruction
- 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.

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 Associate Dean of Academic Advising & Support.

Department/Program Websites; Dartmouth Directory

Department/program 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.