

Chapter VIII - Resignation, Retirement and Salary Continuation Plan (SCP)

A. Resignation

It is expected that faculty resigning their appointments from Whitman College will provide written notification, with an effective date, to the Provost and Dean of the Faculty as early in the academic year as possible and no later than October 1. Such notification is important for the continuity of the academic program and therefore a matter of fairness to students. The college JP Morgan credit card will be terminated upon receipt of said resignation.

B. Retirement

Traditionally the normal retirement age at the College has been 65. In accordance with federal law, the College does not have a mandatory retirement age. However, according to the By-Laws of the Constitution of the College, "The Board of Trustees shall have authority to terminate by retirement the appointment of any faculty member who by reason of mental or physical disability has become unable to perform the duties for which they were appointed."

C. Salary Continuation Plan *(04/23/2014)*

The Salary Continuation Plan (SCP) is designed to release certain approved tenured faculty members from 80% of their required responsibilities to the College while receiving 50% of their base salary at the time they enter SCP, for a period of up to five years. All applications to participate in SCP must be approved in writing by the Provost and Dean of the Faculty and the President and must specify the employee's date of completion of SCP and hence retirement from the College.

A faculty member who elects to participate in SCP will retain tenured status, will continue to be regarded as a full-time employee of the College, and will receive partial salary and full-time benefits (with the exceptions specified below) until the retirement age designated according to the plan selected (see options described below). Faculty members participating in SCP will not be eligible to apply for sabbatical leaves once the chosen plan is in effect.

Faculty members participating in SCP have an ongoing employment obligation to Whitman College subject to the terms of their SCP appointment. This obligation is generally considered to be inconsistent with employment elsewhere in anything other than a temporary or part-time capacity. Additionally, while on

SCP, irrespective of the form of service of the faculty member, any scholarship submitted or published is to reference the faculty member's continuing status as a member of Whitman's faculty.

1. Eligibility

To be eligible to apply for participation in SCP, a faculty member must have completed at least 15 years of employment at the College. Once a faculty member enters into an SCP agreement, they may not reverse their decision and return to full-time teaching at the College. Years of eligibility are as follows:

<u>Age</u>	<u>Years of Eligibility</u>
62	5
63	4
64	3
65	2
66	1

2. Application Procedures

Faculty members who elect to apply to participate in SCP must present a formal request to the Provost and Dean of the Faculty no later than October 1 of the academic year prior to their anticipated final full year of teaching at the College. This deadline enables the College to search for and, if possible, appoint a suitable replacement for the person who has elected to participate in SCP (assuming the position is authorized for replacement).

Before January 31 of the year of application, barring exceptional circumstances, the Provost and Dean of the Faculty will meet with the candidate in order to develop a tentative agreement about how the faculty member intends to fulfill their responsibilities while participating in SCP.

Approval of each application will be considered final when a faculty member and the College enter into a contractual agreement that specifies the College's obligations under SCP as well as the participant's requirements and the consequences of failing to meet these requirements (see below). Again, barring exceptional circumstances, that contractual agreement should be finalized by February 15 of the year of application.

3. Requirements of Participation in the Salary Continuation Plan

During the period when a faculty member is participating in SCP, by January 1 of each preceding academic year, they must submit to the Provost and Dean of the Faculty as part of that faculty member's Annual Faculty Activity Report

a proposal indicating how they intend to fulfill the 20% workload requirement that is a condition of participation in this program. (See section 4 below.)

There are two ways of satisfying the annual 20% workload requirement in any given academic year (see below). The decision to choose one option as opposed to the other will be made in consultation with the Provost and Dean of Faculty and in light of the educational purpose of the College, as articulated in the Whitman College mission statement.

The two ways of fulfilling this requirement are as follows:

- a. A faculty member may elect to teach a single course over the course of any given year of participation in SCP. Unless previously approved by the faculty, each such course must be submitted in a timely manner for consideration via the standard approval process and must be approved by the department, the Curriculum Committee, and the faculty as a whole. For those selecting this option, a course is defined as a three or four credit lecture course, i.e., the equivalent of one-course of a five-course teaching load. In determining what course the applicant will teach each year, preference will be given to courses that meet a current curricular need (e.g., an introductory course that would relieve enrollment pressures either at the departmental or College level, an intermediate or advanced level course that is over-enrolled or that declared majors require in order to graduate, or an interdisciplinary or General Studies course). The teaching contribution will not normally be satisfied by a special topics course unless the applicant and the department can justify to the Provost and Dean of the Faculty that such a course is necessary as well as in the best interests of the students, the department, and the College.
- b. A faculty member may elect to complete over the course of any given year of participation in SCP at least one-fifth of the professional activity that would normally be expected of a faculty member on a full-year sabbatical leave. This requirement may be fulfilled via completion of and/or ongoing work in any of the areas of professional activity. (Faculty Code in CH I, Art IV, Sec 3.2)

In each year of participation in SCP, a faculty member may elect to switch from one way of fulfilling the workload requirement to the other. However, once a proposal has been granted final approval by the Provost and Dean of the Faculty, barring extraordinary circumstances, that choice becomes binding for the coming year.

In exceptional circumstances, the performance of service obligations may be determined by the College as satisfying the 20% workload requirement that

is a condition of participation in SCP. However, there is no obligation or expectation that a faculty member on SCP will engage in any departmental or college service.

4. Annual Plan and Review

During each succeeding year of participation in SCP, by January 1, faculty members participating in SCP must submit to the Provost and Dean of the Faculty an Annual Faculty Activity Report which includes an account of the work completed during the preceding calendar year, and an indication of the participant's proposed plan to fulfill the 20% workload requirement during the following year.

The Provost and Dean of the Faculty, in consultation with the appropriate Division Chairs and department or program chair, will review the proposed plan for each year of participation in SCP and recommend its approval to the President or return it to the faculty member for revision consistent with the expectations indicated above. As a rule, final approval of any given plan will be provided by January 31 of the year in which the proposed plan is submitted.

In addition, those who select the one-course option are required to have each course evaluated by students; and, immediately following the semester in which this course was taught, those evaluations should be released to the appropriate Division Chair as well as the Provost and the Dean of the Faculty.

5. Termination for adequate cause

If it is determined as a result of an assessment of the Annual Review that a faculty member has failed to fulfill the obligations specified in their SCP contract, this will be considered adequate cause for the Provost and Dean of the Faculty to initiate proceedings to consider termination of employment. Any allegation of such failure will be investigated and concluded in accordance with the process. (Faculty Code, CH I, Art III)

6. Department or program affiliation

When a faculty member elects to participate in SCP, they should discuss the appropriate role for that faculty member in departmental and/or interdisciplinary program matters. Participants in SCP retain voting privileges, but may not participate in faculty searches, including tenure-track as well as one-year positions.

Should a faculty member on SCP and the departmental chair or interdisciplinary program director prove unable to come to agreement on the involvement of an SCP participant in departmental or program affairs, the appropriate division chair shall mediate in order to bring the parties to agreement. If that proves impossible, the Provost and Dean of the Faculty shall serve as the final arbiter.

7. Salary

On an annual basis, faculty members who are approved to participate in SCP will receive 50% of the full base salary, after a final salary adjustment based on the faculty member's annual activity report for the final full calendar year prior to entry. No annual salary increments will be provided during the period of participation in SCP. Salary payments will be made on a twelve-month basis.

For faculty who are committed to teaching a course in order to satisfy the 20% work requirement, at the option of the College, additional part-time teaching is possible for compensation at the standard per-credit rate. For those faculty who are committed to satisfying the 20% work requirement via the conduct of professional activity, at the option of the College, part-time teaching is possible for additional compensation at the standard per-course rate.

8. Benefits

a. Faculty members who participate in SCP remain eligible to apply for funding from the Aid to Scholarship and Instructional Development Fund (ASID). However, they will not receive an annual Professional Development Allowance. The ASID Committee should consider faculty members on SCP as tenured faculty who are eligible for receipt of such funds on the same footing as those applicable to all other tenured faculty members.

b. TIAA

Faculty members who have been receiving a 10% match from the College for TIAA will receive a 20% contribution to TIAA during the period of participation in SCP. Individuals may, of course, make additional contributions. The foregoing is subject to legal limits on tax-deferred income.

c. FICA

The College will contribute its monthly share of the FICA tax at the federally determined rate based on the actual salary amount paid to the faculty member throughout the period that SCP is held.

d. Insurance

The College will continue to pay premiums for life insurance, the health plan, and the dental plan, until the age selected specified in the initial SCP contract is reached. The benefits under these plans will be consistent with benefits offered to other full-time faculty. The basic life insurance coverage will be based on the base SCP salary. Supplemental voluntary life insurance and long-term disability are not continued during SCP.

e. Retirement

A faculty member who elects SCP will retire at 65, 66, or 67. Upon retirement, SCP is terminated and the retiree will be eligible to receive the benefits which normally accrue to all persons who retire from the faculty.

f. Tuition Remission

Faculty members who participate in SCP remain eligible to receive tuition benefits consistent with other full-time faculty.

g. Death Benefit

In the event of the death of a faculty member during SCP, their estate will receive salary payments for the month in which death occurs and for two succeeding months.

h. Office space will be provided to those who select the one-course option. There is, however, no guarantee that an office will be located in the academic building in which the faculty member was previously located and/or in which the course is to be taught. Those who select the professional activity option will be provided an office only if available.

9. Re-evaluation

The College reserves the right to re-evaluate the SCP policy at any time and may modify the program or terminate it if deemed necessary. If modification or termination should occur, the faculty members already participating in SCP will continue to participate in accordance with the terms specified in the initial contract.

D. Phased Retirement

Phased Retirement (PR) is designed to allow a tenure-track faculty member to reduce their teaching obligation to an average of 50% of full-time for a period of up to five years after the age of 60 but not beyond age 70. The major objective of this option is to provide faculty members who wish to do so the opportunity to reduce their teaching obligations over a five-year period prior to their selected age of retirement and be compensated during that period at a percentage of their base salary rather than at the part-time faculty rate. The basic principle upon which this option is constructed is that a senior faculty member may retire gradually at minimal net cost to the College, while being replaced by a faculty member at the entry rank. The faculty member who elects PR remains a tenured member of the faculty for the percentage teaching agreed upon, receiving a proportionate salary and full benefits. All applications for PR must be approved by the Provost and Dean of the Faculty and the President.

1. Eligibility

Faculty are eligible to apply for PR at age 60 or beyond for a period of up to 5 years and not to extend beyond age 70. A faculty member who selects this option may not reverse their decision and return to full-time teaching. Continued part-time teaching, at the option of the College, is possible for additional compensation at the per-credit rate for part-time faculty in the relevant year.

2. Application Procedures

Faculty members who elect to apply for PR will present formal applications to the Provost and Dean of the Faculty. Applications must be made early enough for the department and the College to seek and appoint a suitable replacement for the person who has elected PR. In particular, applications must be submitted before October 1.

3. Salary

Faculty who elect PR will receive their full base salary annually prorated to the actual percentage teaching load they undertake each year. The teaching for the five-year period will not exceed 50% of a full-time load and the percentage load in any year will not exceed the percentage of the previous year. Annual salary increments for the five-year period of the PR will be determined by the Provost and Dean of the Faculty.

4. Benefits

a. TIAA

Faculty who have been receiving a 10% match from the College for TIAA will continue to receive a 10% match. Individuals may, of course, make additional contributions to TIAA if they wish to do so.

b. FICA

The College will contribute its monthly share of the FICA tax at the federally determined rate based on the actual salary amount paid to the faculty member through the period of PR.

c. Insurance

The College will continue its payments of premiums for life insurance, the health plan, the dental plan, and the group disability plan, consistent with eligibility requirements of each annual plan.

d. Retirement

A faculty member who elects PR will retire at the end of the period agreed upon. Upon retirement, PR is terminated and the retiree will become eligible to receive the benefits which normally accrue to all persons who retire from the faculty. PR faculty may be employed part-time after the expiration of PR but at the option of the College, and at the per-credit rate for part-time faculty in the relevant year.

e. Death Benefit

In the event of the death of a faculty member during PR, their estate will receive salary payments for the month in which death occurs and for two succeeding months.

5. Re-evaluation

The College reserves the right to re-evaluate its position concerning the offering of PR at any time and may adjust the option or withdraw from offering it as it deems necessary. If such adjustment should occur, those faculty members already under PR will be continued under the specifications agreed upon.

E. Policy for Computers of Faculty Resigning, Retiring or Entering SCP

Upon resignation or retirement, or at the time a faculty member leaves the SCP program, if an individual does not have a campus office, they must return their Whitman College computer to WCTS (Whitman College Technology Services) by August 31 of the year of retirement. Individuals leaving SCP are responsible for the cost of returning their computer to the college.

1. WCTS will provide a computer and support to faculty who enter SCP. At the beginning of SCP, a faculty member will be provided a standard issue computer, with a five-year life cycle.
2. WCTS will provide computer support to academic staff members who continue working for the college after retirement, either on a voluntary or paid basis, and who retain a campus office. WCTS requires official notification when network access is requested for these individuals. Library privileges should be arranged with the director of Penrose Library.
3. The Provost and Dean of the Faculty office will notify WCTS staff of known retirements and SCP agreements in April of each year.
4. Replacement of high-end computer equipment beyond the standard WCTS issue will be the responsibility of the faculty member's department.