



## EMERITUM REQUEST PROCESS: TIP SHEET

### INTRODUCTION

MSU deeply appreciates the many years of loyal service and creative contributions of its retired faculty, academic staff, and administrators. The university considers them a continuing important resource for the institution. The Emeritum title awarded to faculty, academic staff, and administrators at time of retirement signals honor and accomplishment. Faculty, academic staff, and administrators may request emeritum status if they meet eligibility requirements.

Emeritum status is not granted automatically; it is requested and reviewed through an approval process. The [Awarding of Emeritum Status](#) policy outlines various categories under which emeritum status may be awarded. This document summarizes the steps required for each of these categories. It also provides key information about the general process (e.g., timing and factors to consider for supervisor/MAU Head endorsement).

### ELIGIBILITY TO REQUEST EMERITUM STATUS

Faculty, academic staff, or administrators may request emeritum status if they fall within one of the following categories:

- 1) those who are retirement eligible<sup>1</sup>, or
- 2) those who are not eligible to retire from MSU but have completed a substantial period of distinguished service<sup>2</sup> at MSU.

### EMERITUM REQUEST CATEGORIES

The Emeritum policy outlines various processes based on eligibility status and whether the request is for emeritum status for an administrative title.

There are four main emeritum request categories; refer to the table within this document that outlines the steps for the request, review, and approval processes.

Table #	Appointment Status	Requesting Emeritum Status for an Administrative Title	Retirement Eligible	Not eligible to retire from MSU, but has completed a substantial period of distinguished of service at MSU
<b>1</b> (Page 2)	Faculty or Academic Staff Member	No	Yes	
<b>1</b> (Page 2)	Faculty or Academic Staff Member	No	No	Yes
<b>2</b> (Page 3)	Administrator	Yes	Yes	
<b>2</b> (Page 3)	Administrator	Yes	No	Yes

<sup>1</sup> Official MSU retirement status as defined by university policies.

<sup>2</sup> The policy does not define the terms “substantial” nor “distinguished.” Each request made under this category will be reviewed on a case-by-case basis, and only if supported by the MAU head. Units may wish to consult the Office for Faculty and Academic Staff Affairs in these cases.

**TABLE 1: REQUESTS FROM FACULTY AND ACADEMIC STAFF**

Step	Responsible person or office	<u>SECTION 1</u>	<u>SECTION 2</u>
		If the faculty/academic staff member is retirement eligible at MSU, the steps are...	If the faculty/academic staff member has completed a substantial period of distinguished service, but short of the years of service needed for retirement eligibility, the steps are...
1	Faculty/academic staff member	Initiates and completes the <a href="#">Emeritum Request Form</a> and sends it to their supervisor.	Submits a formal letter of request to their supervisor.
2	The supervisor	<p>a) Reviews the request, indicates their recommendation, and signs the form. For “no” recommendations: prepares and attaches a document indicating the reasons.</p> <p>b) Forwards the form and supplemental documents (if applicable) to the Major Administrator Unit (MAU) Head (e.g., dean, vice president, vice provost, provost).</p>	<p>a) Reviews the request and assuming positive support, prepares a letter outlining the individual’s role(s), length of time served, and accomplishments and contributions at MSU.</p> <p>b) Forwards the request materials to the MAU Head.</p>
3	The dean/MAU Head or designee	<p>a) Reviews the request and checks the appropriate endorsement box on the form.</p> <p>b) Sends the fully completed Emeritum Request Form and supplemental documents (if applicable) to the Office for Faculty and Academic Staff Affairs (FASA) at <a href="mailto:FASAffairs@msu.edu">FASAffairs@msu.edu</a> for review and approval.</p>	<p>a) Reviews the request, and if supported, prepares a separate letter of support, or indicates endorsement in a cover memo.</p> <p>b) The dean/MAU head or unit designee sends the faculty/academic staff member’s request, the supervisor’s letter, and their indication of support to the Office for Faculty Academic Staff Affairs for review and approval.</p>
4	The Office for Faculty & Academic Staff Affairs	<p>a) Reviews the request. Barring serious concerns pertaining to the faculty/academic staff member’s conduct, emeritum status will be approved. If serious concerns arise (e.g., related to allegations of misconduct, past misconduct), the Vice Provost for FASA may wish to consult with the Provost and other administrators and groups (e.g., the UCFA) prior to making a determination.</p> <p>b) Sends a letter of determination to the faculty/academic staff member, their supervisor, and the MAU head.</p>	<p>a) Consults with the University Committee on Faculty Affairs (UCFA). Assuming positive support, facilitates securing approval by the Provost and President.</p> <p>b) Sends a letter of determination to the employee, employee’s supervisor, and MAU head.</p>

**TABLE 2: REQUESTS FROM ADMINISTRATORS**

Step	Responsible person or office	<b>SECTION 1</b> If the administrator is retirement eligible at MSU, the steps are...	<b>SECTION 2</b> If the administrator has completed a substantial period of distinguished service, but short of the years of service needed for retirement eligibility, the steps are...
1	The requesting employee (i.e., administrator)	Initiates and completes the <a href="#">Emeritum Request Form</a> and sends it to their supervisor.  In addition to the above form, deans or executive managers requesting emeritum status for their own administrative title must attach a formal letter of request outlining their accomplishments at MSU in their role.	Submits a formal letter of request to their supervisor.
2	The supervisor	a) Reviews the request, indicates their recommendation, and signs the form. For “no” recommendations: prepares and attaches a document indicating the reasons.  b) Forwards the form and supplemental documents (if applicable) to the Major Administrator Unit (MAU) Head (e.g., dean, vice president, vice provost, provost).	a) Reviews the request and assuming positive support, prepares a letter outlining the individual’s role(s), length of time served, and accomplishments and contributions at MSU.  b) Forwards the request materials to the MAU Head.
3	The dean/MAU Head or designee	a) Reviews the request and checks the appropriate endorsement box on the form.  b) If supported, sends the fully completed Emeritum Request Form and supplemental documents (if applicable) to the Office for Faculty and Academic Staff Affairs (FASA) at <a href="mailto:FASAffairs@msu.edu">FASAffairs@msu.edu</a> for review and approval.	a) Reviews the request, and if supported, prepares a separate letter of support, or indicates endorsement in a cover memo.  b) The dean/MAU head or unit designee sends the employee’s request, the supervisor’s letter, and their indication of support to the Office for Faculty Academic Staff Affairs (FASA) for review and approval.
4	The Office for Faculty & Academic Staff Affairs	a) Reviews the request. Barring serious concerns pertaining to the employee’s conduct, emeritum will be approved. If serious concerns arise (e.g., related to allegations of misconduct, past misconduct), the Vice Provost for FASA may wish to consult with the Provost and other administrators and groups (e.g., the UCFA) prior to making a determination.  b) Sends a letter of determination to the employee, employee’s supervisor, and MAU head.	a) Reviews the request, facilitates review by the President, and assuming positive support, secures approval.  b) Sends a letter of determination to the requesting administrator, their supervisor, and MAU head.

## KEY INFORMATION

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- **Timing.** If faculty, academic staff, and administrators would like to have emeritum status at the time of their retirement, requests should be received by the Office for Faculty and Academic Staff Affairs (FASA) **three to six months** before the employee's anticipated retirement date.
- **Requests for Emeritum Status to Administrative Titles.** The emeritum designation is appended only to the most senior administrative title held at Michigan State University, which may be held at or prior to the time of retirement, e.g., vice president emeritum, dean emeritum. The emeritum designation is not normally awarded for administrative titles held on an "acting" or "interim" basis.

A faculty/academic staff member who previously held an administrative title may wish to request the emeritum title to both their faculty/academic rank and their prior administrative title. This is done through one request, following the specific policy requirements for both categories.

- **Retirement Process.** The Emeritum request process is separate from the retirement process. Employees can submit their retirement form prior to requesting emeritum status.
- **Key factors to consider when making a recommendation.** The key factors for a supervisor or MAU Head to consider when making a recommendation on granting emeritum status are whether:
  - a) the employee received serious discipline,
  - b) the serious discipline process has been initiated,
  - c) dismissal proceedings have been initiated,
  - d) there is a pending allegation of violation of university policy,
  - e) an active investigation into an allegation of violation of university policy is underway, or
  - f) a violation of university policy has been established.

It is expected that most employees will receive a positive recommendation, and that supervisors will not withhold a positive recommendation unless there is evidence of any of the above factors. The above factors are not an automatic exclusion from consideration; each circumstance is case-specific. Supervisors and MAU Heads are encouraged to contact their FASA liaison to discuss specific scenarios.

- **Appeal process.** Faculty and academic staff may appeal a negative determination by filing a written appeal within 30 days of the decision to the University Committee on Faculty Affairs (UCFA). If the UCFA determines the appeal has merit, it will forward the relevant documents to the Provost who shall make the final decision. Administrators do not have an appeal process.