

THE DEVELOPMENT OF EMERITUS POLICY
AT CALIFORNIA STATE UNIVERSITY, LOS ANGELES

By Sidney P. Albert

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The founding of the California State University Emeriti Association on February 9, 1978 was by no means an isolated event; rather, it marked the birth of an offspring engendered in the course of an evolving campaign to reform University emeritus policy—a campaign that began more than a year earlier. The initial impetus came from a letter memorandum of mine to the Executive Committee of the local Academic Senate (and President John Greenlee) on November 1, 1976. Motivated by learning of instances of unfair treatment of emeriti, it advanced a proposal, titled “Professor Emeritus Privileges,” which urged exploration of the possibility of granting emeritus faculty “a wider range of available privileges,” including essential fiscal support—especially for those who remained active as scholars.

The Executive Committee of the Senate, then chaired by Eloise King, referred the proposal to the Faculty Affairs and Fiscal Affairs committees, and also forwarded it to the statewide Academic Senate for “careful study” of the issue. Although they were to act more favorably a year later, by January 4, 1977 the statewide Academic Senate replied that its Faculty Affairs Committee, after studying the matter, decided against further action at the state level for two reasons: (1) statewide policy would require funding, which would cause other educational needs to suffer, and (2) determinations of emeritus policies were best left to the separate campuses. Our own campus Fiscal Affairs Committee likewise responded negatively. For unrecorded reasons, it confirmed its Budget Subcommittee’s recommendation to table the item.

It had not been my intention to pursue the policy process beyond the original letter, but circumstances ruled otherwise. Soon came an invitation to appear before our Faculty Affairs Committee, where I was queried about how emeriti were dealt with at other colleges and universities. That, in turn, led me to make inquiries about the programs in effect at other area institutions—in particular, at the UCLA Emeriti Center. Also sought out for consultation were a number of our own active and retired colleagues (especially Leonard Mathy). These probings not only broadened my understanding of potential improvements, but also of the thorny obstacles to their realization within the CSU system. That experience prompted me to formulate a revised and expanded proposal, sent to the CSULA Academic Senate on February 9, 1977 under the heading, “Professor Emeritus Participation.” It was an attempt to argue the case more pointedly, to list a dozen inexpensive emeritus benefits that could be granted immediately, to answer objections, and to suggest ways of gaining some measure of funding. In this statement, as in the previous one, a basic theme was that the envisioned program would be at least as beneficial to the University as to its emeriti. The Senate also forwarded this reformulated proposal to the Faculty Affairs Committee, then headed by Mildred Massey.

A volunteer subcommittee, composed of Donna Aguilera, Evan Oyakawa, and Marie-Antoinette Zrimc as chair, was assigned the task of exploring my emeritus privileges proposals during the summer of 1977. They accorded me the opportunity to meet with them in July. After receiving and discussing the report of the subcommittee, the parent committee submitted its

recommendations to the Academic Senate on August 16. These included the “designation of a staff member as officer in charge of emeriti matters,” who would handle problems and concerns of emeriti. Also recommended was a vote, to be conducted in the fall, on an amendment to the Faculty Constitution that would seat one voting representative of the emeriti on the Academic Senate. To this suggestion of mine was appended a parenthetical note: “An organization of professors emeriti, soon to be formed, will provide a mechanism of selection.” This prospect, already set in motion, was omitted in the Faculty Affairs document.

It was not until the end of October that these recommendations came before the Senate for action. Objection to the form in which they were cast resulted in their return to the committee for emendation. The revised committee document, dated November 9, 1977, became the basis for the Senate’s deliberation. It faced a rival one of the same date, from me, which included a preamble committing the institution to “fostering an active continuity of relationship with emeriti.” Supplementing this proposal on the following day was another of mine in the form of a Senate resolution urging the CSU administration and the statewide Academic Senate “to take such action as is necessary to clarify or amend state law to ensure emeriti professors legal recognition as a class of faculty members and scholars, and to sanction awarding them limited fiscal support for worthy research and scholarly endeavors.”

It proved necessary to restate my November 9 recommendations as an amendment to the section on Emeritus Status in the *Faculty Handbook*. Submitted on November 18, its provisions were to substitute for all those in the Faculty Affairs document, with the exception of two draft amendments to the Faculty Constitution. The amendments authorized the inclusion of a voting emeritus faculty member on the Academic Senate, elected by members of the Emeriti Association. This had been one of my suggestions to the committee.

The Academic Senate devoted virtually its entire November 22 meeting to action on emeritus policy. Without a dissenting vote and with only minor amendments, it passed a motion by Donald Burrill to substitute the exact language of my November 18 proposal for the relevant sections of the Faculty Affairs Committee statement. This version was then approved as policy for insertion in the *Faculty Handbook*. (An account of the Senate’s actions appeared in the *University Times* of November 29, 1977.) The Senate members went on to address the issue of an emeritus senator on December 6, 1977. After passing Thomas McEnroe’s motion to reduce the term of office from three years to one, the senators acquiesced to Joseph Casanova’s motion to postpone action on the question “until such time as the Emeriti Association provides the Senate with a copy of its adopted constitution and a slate of its officers.” The Senate also approved verbatim my proposed resolution urging legal recognition for professors emeriti, on a motion by Harold Goldwhite, and forwarded it to the Chancellor and the statewide Academic Senate for action.

During this period, Eleanor Tweedie, then assistant to the vice president for academic affairs, reacting to the Faculty Affairs Committee’s support for granting emeritus faculty privileges—some of which would entail the use of University funds—wrote to the Office of the General Counsel, CSUC, on December 5, seeking an opinion on the legality of such funding. In the event that it should prove to be illegal, she requested suggestions about other ways of serving emeriti. When Edward Forde, chair of the Faculty Affairs Committee, furnished me with a copy of her memorandum, it aroused my concern. My reply to him pointed out that it duplicated in part the Senate resolution on the subject, and that up to that time I had sought to forestall attempts to determine the legal status of emeritus faculty, lest they impede progress on measures that would not raise such questions. Moreover, indications were that a negative response was likely under then-current interpretations of the law. Such a judgment would have entailed diverting our efforts

to amending or reforming the law. To my knowledge, the General Counsel never issued a legal opinion on the matter. Subsequent experience has confirmed, however, that the prevailing belief at the time did indeed hold expenditures on emeriti to be illegal, since as retirees they were no longer employees of the University.

[It would be more than a decade before the CSU Board of Trustees adopted a resolution, "Recognition of the Title Emeritus Faculty," which established that "the emeritus faculty shall be deemed to be continuing members of the academic community." The resolution provides that emeritus status confers designated privileges "on the same basis as they are enjoyed by the general faculty." Special credit for attaining this long-sought goal is due Leonard Mathy, who valiantly fought for it on behalf of CSU-ERFA. It finally settled all issues of legitimacy.]

During the course of these developments, the growing realization that the emeriti cause properly belonged in the hands of the emeriti themselves moved me (then still an active faculty member) to undertake to reach out and engage them. Among other things, this necessitated correcting and updating the sorely neglected campus records of retired faculty addresses. Some 89 emeriti were then listed in the 1976-77 Catalog, including a few who had recently died. Fortunately, my efforts to communicate with the accessible faculty retirees was facilitated by staff support provided by Vice President John Palmer and David Riles, director of personnel. With their aid, my letter of March 10, 1977 went out to the known retired faculty. In addition to reporting on the advances in emeritus policy achieved thus far, it invited them to a meeting in the University Union on April 7, 1977. The declared purpose of the meeting was "to initiate action toward founding an organization devoted to furthering the interests of academic staff members of this institution who have retired or are soon to retire." A notice in the *Faculty Bulletin* on April 1 repeated the invitation to faculty members nearing retirement as well as to those already retired.

Seven emeriti and nine soon-to-retire faculty members attended the meeting. Eight more individuals, who were unable to come, expressed interest in the undertaking. Appearing also were various representatives of the administration, the Academic Senate and its committees, and four faculty organizations. Discussion at the meeting led to a decision to form a steering committee charged with the responsibility of organizing an association of emeriti. The individuals who served with me on the Steering Committee were Georgia Adams, Morton Renshaw, and Helen Truher. Subsequently, Georgia Adams and Helen Truher undertook to draft a constitution and by-laws (using those of the UCLA Emeriti Association as a model). A Nominating Committee was also appointed, with Hudson Roysner as chair, and Richard Nahrendorf and George Francis as members. When Roysner had to resign for medical reasons, Richard Lillard replaced him, and Nahrendorf took over as chair.

With the arrival of the new year (1978) and the completion of the requisite groundwork, the stage was set for the creation of the CSULA Emeriti Association. To assist in launching the new association, the campus chapters of the Association of California State University Professors (ACSUP) and the California College and University Faculty Associations (CCUFA), through their respective presidents, Arthur Kirsch and Donald Nielsen, contributed gifts of \$100 each to the nascent organization.

Ten months after my first letter to the located emeriti, a second one, dated January 4, 1978, was mailed to 140 prospective members. It invited them to attend the organizational meeting of the Association at the Faculty Club on February 9, 1978, at 3:00 p.m. Enclosed with the letter was a copy of the proposed Constitution, the Nominating Committee's slate of nominees, and a mail ballot for voting on both the Constitution and the proposed officers. The scheduled agenda of the meeting was the implementation of the Constitution (assuming its ratification), installation of officers,

determination of membership dues, and a report by CSULA statewide senators on prospects for emeritus status reform at the system level. The letter also summarized the further progress in emeritus policy reform on campus since my March 10, 1977 message to them. It concluded with this assessment of how matters stood at the time: "Clearly the climate is changing, and the future looks propitious for the new association and its members. Still, not all is smooth sailing: it would be a serious mistake to ignore the barriers—legal, fiscal, and psychological—that linger. Work remains to be done, and the Association is needed as the proper medium for accomplishing it. It is your cause, your organization, and it will have to have your support to function effectively."

Forty-six ballots were returned, uniformly approving the Constitution and electing the nominated officers: Keith D. Snyder, president; Clifford Dobson, vice president; James J. Stansell, secretary; Michael F. Grisafe, treasurer; and Alfred E. Ehrhardt and Alvin E. Tuohino, members-at-large. Ineligible for office by virtue of not yet having retired, I was allowed to sit with the Executive Committee as a ghost member-at-large. The minutes of the February 9 meeting record my announcements of the ballot results, my thanks to the individual members of the Steering and Nominating committees, and my good wishes to the organization. Donald Moore, chair of the Academic Senate, extended that body's welcome and its good wishes, and deemed it likely that a member of the Association would be elected to the Senate. President Snyder then officially called the meeting to order. The members attending approved decisions concerning the operating year, dues (\$4 per year), charter membership, and check signing, and commended Sidney Albert's efforts.

Still awaiting resolution was a policy of crucial importance to our emeriti and their fledgling association. The Senate had yet to act on the remaining recommendation of the Faculty Affairs Committee: the pair of amendments to the Faculty Constitution providing for inclusion of a voting representative of the emeriti on the Academic Senate. Complying with the Senate's preconditions, my memorandum of March 30 to Donald Moore, submitted with a copy of the Association's Constitution, notified him that it had been ratified, and listed the elected officers.

On April 18, the Senate returned to the senator issue, which proved to be more controversial than anticipated. After voting down two proposed modifications, the amendments to the Faculty Constitution were approved for submission to a faculty vote. One of the unsuccessful motions, by Marie-Antoinette Zrimc, would have had the emeritus senator and an alternate elected by the regular faculty from a list of Emeriti Association nominees. The other, by Frieda Stahl, sought to make the emeritus member of the Senate honorary, without a vote. The faculty vote was scheduled for the period of May 5 through May 18. Accompanying the ballot were arguments for and against the amendments, the former by Edward Forde, chair of the Faculty Affairs Committee and member of the Senate Executive Committee, and the latter by Stanley Hopper, president of the campus chapter of the American Association of University Professors (AAUP) and (in that capacity) honorary member of the Senate. Forde pointed to the gain in experience for the Senate, the merit of encouraging the professorial interests of emeriti, and the minimal effect of one added vote. Hopper presented four arguments: (1) other similarly voluntary faculty organizations were permitted an honorary *nonvoting* representative in the Senate; (2) most emeriti would not be involved in and informed about emerging issues or the performance of their representative; (3) an emeritus senator could serve best as an unelected, Senate-chosen "elder statesman" whose understanding, wisdom, and advice could be sought at times; and (4) conferring the vote would set an undesirable precedent for other constituencies (such as alumni) to claim such voting representation.

A period of hospitalization precluded my writing a defense of the amendment. By the time I returned to campus, the balloting was well under way. It was also evident that the unanswered opposing arguments were very persuasive. Fortunately, Vice President John Salmond came to the

rescue, making possible the campus distribution of my hasty, belated rebuttal on May 12, halfway through the voting period. My arguments were addressed to each of Hopper's points. Unlike members of the faculty organizations, who were already represented by their school senators, emeritus professors had no other voting representative. Emeriti had yet to be afforded the opportunity to fulfill responsibilities on campus—when doors are closed to them, the excluded should not be charged with failure to enter. The Emeriti Association could keep emeriti as involved and informed as most faculty members. The value of an “elder statesman” would be strengthened by a vote; selection by the Senate would run counter to the idea of representative government that the Senate exemplified. No precedent for other groups need follow, for none would meet the criterion of lengthy service as experienced faculty. The entire University would be the beneficiary of emeritus Senate voting membership.

There is no way of knowing how much influence this tardy defense exerted. But then what really mattered was that the faculty did approve the constitutional change, even though by only two votes more than the required two-thirds majority: 204 to 99.

When, on July 22, 1978, President Greenlee finally affixed his signature to the statement for the *Faculty Handbook* that had been approved by the Academic Senate on the previous November 22, it became official campus emeritus policy. On September 21, 1978, Vice President John Palmer wrote to Keith Snyder that he expected the University to be in compliance with the newly promulgated emeriti privileges and prerogatives by the fall quarter. By June of 1979, Marcella Oberle, then chair of the Academic Senate, and President Greenlee, in turn, had accepted editorial emendations to the policy statement that had been suggested by the Alumni Association and by me. The eligibility of emeriti to be awarded grants, denied initially, was also eventually added to emeritus privileges, although it is absent from the policy statement. I put the eligibility to the test by applying for a grant. It was not awarded, yet was considered on the same basis as the others, thus losing the battle but winning the war.

It was not a mere instance of coincidence that the statewide Academic Senate on May 4, 1978—three months after the establishment of our association—unanimously approved its own resolution on “Emeritus Faculty Status,” urging each campus to offer a variety of listed privileges and benefits to its emeritus faculty. Subsequently, that body sent to the individual campuses of the system inquiries about what they were doing for their emeriti. David H. Elliott, chair of the CSU Academic Senate, in acknowledging the replies received from Donald Moore, wrote to him on September 18, 1978: “I am convinced that your campus is leading the ‘pack’ in this area.”

These actions brought to a remarkably successful conclusion the campus campaign for emeritus policy reform initiated in November 1976. Not only did the policy revisions, so wholeheartedly embraced, reflect credit on CSULA, but they placed this institution in the forefront of the emeritus movement in the CSU system.

The CSULA Emeriti Association, for two and a half [now three] decades the guardian of emeritus interests on our campus, can also take pride in having been a pioneering body that helped spawn the formation of similar organizations in the CSU system; that sponsored the founding of the systemwide CSU Association of Emeriti Professors, later renamed the CSU Emeritus and Retired Faculty Association (CSU-ERFA); and that has also been a champion of the so-called “Emeriti Bill of Rights” [See AAUP's *Academe*, July-August 1986] in both the state and the nation. To have been a participant in these achievements has been particularly gratifying. May the Emeriti Association continue to thrive and to render beneficial service to its members and to our University for many decades to come.