MSU retired faculty have informed each other via social conversations about the various benefits and privileges available to MSU retirees. After participating in those conversations over a number of years, the Association of Retired Faculty (ARF) made a list and, after checking the information with university sources, created a web page for our membership (see Attachment A, page 4). Subsequently, at a meeting of ARF with the University of Montana Association of Retirees, the U of M folks showed us a copy of the Benefits and Privileges brochure that they receive upon retirement. The information from that brochure is also available on the U of M web site (see Attachment B, page 5). There is an obvious need for such a brochure at MSU.

After some on-line checks of the benefits and privileges accorded retirees at other universities, ARF believes that pooling the U of M and MSU lists, plus adding a couple items, will provide retiree benefits and privileges similar to those available at other land grant institutions. Consequently, ARF proposes that MSU adopts the benefits and privileges for retirees listed on page 3 and that MSU gives to each retiree upon retirement a brochure showing these benefits and privileges. To illustrate the concept, the list is formatted as a tri-fold brochure. The potential information that could appear on the front, back, and folded inside page of the brochure is shown on page 2; we anticipate that the brochure will be distributed by MSU Human Resources.

Comparing the list to the information we have consolidated on the ARF web page (attachment A), it is clear that the all of the benefits and privileges listed in the first two columns on page 3 plus the items pertaining to the MSU Alumni Association and Listing in the MSU Catalog are available now to MSU retirees, although there is no university mechanism in place to inform them of that fact. We are not sure of the present status at MSU of the items Mentoring, Courses, Grants, and Communications in the 3rd column. Those items are consistent with other universities and with conversations between ARF and MSU administrators, but we have not found documentation. The final two items on the proposed list, Athletics and Performing Arts are available to U of M retirees (Attachment B).

By maintaining connections with its retirees and supporting their professional and personal well-being, the university community will benefit in many ways. ARF requests that university assign staff to review and edit the contents of this proposal, reformat it to university quality, and publish a Benefits and Privileges for MSU Retirees brochure. As stated on the prototype brochure (page 2), the proposed benefits and privileges will allow retirees to continue their university and professional activities, remain connected to the university, and maintain a healthy body and keen mind.

Submitted by: Pierce C. Mullen, President, MSU Association of Retired Faculty  
Date: January 11, 2013  
Contact: Pierce Mullen [pierce3@bresnan.net]
Benefits & Privileges

Montana State University provides certain benefits and privileges to retirees so that they can continue to participate in university and professional activities, remain connected to the university, and maintain a healthy body and keen mind.

PROPOSAL FROM THE MSU ASSOCIATION OF RETIRED FACULTY

DRAFT OF 2013-01-11

Contacts
MSU Human Resources
http://www.montana.edu/hr/

MSU Association of Retired Faculty
http://www.montana.edu/retired

MSU Human Resources
Tel: 994-3651
**Benefits & Privileges**

**Access to MSU Facilities & Services**

**CatCard Identification** Retirees and/or spouses will be issued a CatCard at the faculty rate [www.montana.edu/catcard]; it is required for some MSU retiree benefits and privileges.

**Parking** A single, non-transferable, MSU parking hangtag, free of charge for lifetime [ww2.montana.edu/policy/police_regulations]

**Library** Same services and borrowing privileges as active faculty, including electronic access [www.lib.montana.edu]

**Insurance** May elect to continue on a group insurance plan offered by MUS Choices; application must be made within 63 days of retirement [www.mus.edu/choices]

**Fitness** Membership in the ASMSU Marga Hosaeus Fitness Center at a reduced rate [www.montana.edu/getfit]

**Wellness** Access to MUS Wellness information; e.g., on the email list for the electronic newsletter [wellness.mus.edu]

**Recreation** ASMSU Outdoor Recreation Program services, such as equipment rental, group outings, etc. [www.montana.edu/outdoorrecreation]

**Email & web access** MSU e-mail account (retiree must activate the account immediately upon retirement), on-campus wireless access to the web, and IT Center assistance with set up [www.montana.edu/itcenter]

**Bookstore** Receive the same discounts as active faculty [www.msubookstore.org]

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**Continued Academic Involvement**

Departments shall endeavor to meet reasonable scholarly and academic needs of retired faculty in a manner consistent with continuing contributions to the mission of the department and university, within limits governed by the availability of resources, and balanced against other needs and priorities. A department should negotiate with each individual retiree a specific written agreement that includes activation and termination dates.

**MSU Faculty Membership** Emeritus faculty are members of the MSU faculty and an emeritus faculty member may be appointed an *ex officio* member of Faculty Senate or its subcommittees and may be appointed to serve on University, College, or Departmental committees [www2.montana.edu/policy/faculty_handbook]

**Participation** Invited to participate in academic convocations, commencements, and other academic endeavors, including non-voting attendance at general meetings within the retiree’s department and college

**Research** Serve as a principal investigator for MSU grant proposals when consistent with the policies of the Office of Sponsored programs. [www.montana.edu/wwwvr/osp]

**Work space & administrative support** Office space, laboratory space, and administrative support, as available and needed to meet the department’s instructional, research, and service responsibilities. *(The resources of departments are variable; space and support for retirees may be available, but only after the department has met the immediate requirements of its active faculty & staff.)*

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**Mentoring** With the agreement of the department head, retired faculty may continue to chair graduate student committees and serve on graduate committees

**Courses** Retirees and/or spouses may take/audit one university course per semester without need to officially enroll or pay fees, dependent on the permission of instructor and available space

**Grants** Small grants to promote continued research and scholarly activities, including travel support for professional activities, are occasionally available on a competitive basis through the Office of the Vice President of Research

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**Maintaining Connections with MSU**

**MSU Alumni Association** Honorary membership and automatic recipient of electronic mailings and publications from the Alumni Association to its membership [alumni.montana.edu]

**Listing** Upon request, list name and title in the MSU Catalog [www.montana.edu/wwwcat] and include contact information in the directory [www.montana.edu/people]

**Communications** Upon request, a retiree will be included in her or his department’s and college’s lists of retirees and will receive all faculty notices and announcements.

**Athletics** Two complimentary tickets per event to MSU-sponsored athletic events, including track meets and football, basketball, and volleyball games

**Performing Arts** Two complimentary tickets for MSU theatrical productions and concerts
Attachment A - http://www.montana.edu/retired/Advantages.htm

Association of Retired Faculty

Retiree Privileges/ Courtesies

E-mail -- The montana.edu e-mail account is automatically continued for emeritus faculty until the account has not been used for a period of two years. Other retirees can maintain their e-mail accounts if ITC receives a letter from their department head indicating that ITC should leave the account open. Again, if the account is inactive for two years, it will be closed. Your montana.edu e-mail account will be discontinued the day of your retirement unless one of these arrangements has been previously made with ITC.

Parking on campus -- The MSU Parking Regulations state the following: "Retirees from Montana State University-Bozeman will be entitled to a single vehicle SB permit each year, free of charge. Documentation is to be provided by University Personnel and Payroll to substantiate this status. The permit is issued only to the retiree and is non-transferable." Contact the MSU University Police Department at 7th and Kagy to obtain your permit.

CAT CARD -- Retirees need an MSU CAT CARD for access to athletic / gym facilities and the library. MSU CAT CARD's or replacements are available at the CAT Card Office, SUB 107. There is a $15 charge for the card.

Library -- Retirees retain their MSU library privileges. A valid MSU CAT Card must be presented to check out library materials.

Research -- Retirees may serve as a Principal Investigator on an externally funded research program if they have a minimum of 0.1 FTE appointment (see guidelines from the Office of Sponsored Programs, Who May Serve as a P.I. )

ASMSU Recreational Facilities/ Fitness Access -- Retirees have access to the gym and recreational facilities at a reduced rate as described on the Recreational Sports/ Fitness web page.

ASMSU Outdoor Recreation Program -- Retirees have access to facilities, equipment rentals, and some programs. A Cat Card is required and in some cases verification of the retiree's status with their home department may be required. For details on services and equipment offered, see the ASMSU Outdoor Recreation Program web page.

Athletic tickets -- At this time there is no special provision for retirees.

Pre-tax payment of health insurance premiums -- Every individual planning retirement is required to make arrangements with their pension provider to automatically deduct MSU Choices health insurance premiums (see the workbook for retirees on the Choices web site). However, if you work part-time on campus after your retirement, you may be able to pay your health insurance premiums as a deduction from your MSU paycheck, thus paying with pre-tax dollars from your pay, rather than post-tax dollars from your retirement (thus saving considerable money on your taxes). Such arrangements should be made only after automatic deductions have been arranged with your retirement provider. This information is intended only to provide general advice of potential savings, you need to contact MSU Human Resources before your retirement for complete details on whether this might be possible in your situation.

MUS Wellness Programs -- Retirees may have access to the University System wellness programs, depending upon the MUS Choices program they enroll in. See the MUS Wellness web page for details.

Quoted from the MSU faculty handbook -- Privileges of Emeritus Status:

"Emeritus status shall entail continued campus courtesies including, but not necessarily limited to, the actions too:

1. Use library facilities.
2. Become honorary members of the Alumni Association.
3. Receive publications sent to active faculty and members of the Alumni Association.
4. Use recreational facilities at a reduced rate.
5. Participate in academic convocations, commencements, and other academic endeavors.
6. Request that their names be retained in the University catalog, if desired, until their death.
7. Attend, without vote, meetings of their department and college.
8. Act as principal investigator for MSU grant proposals consistent with the policies of the Office of Sponsored programs.
9. Request office, laboratory space, and/or secretarial help, as available. Since the resources of the various departments vary, no university-wide policy can guarantee access. Such accommodations may be extended to emeritus faculty with the understanding that the instructional, research, and service requirements of the tenable faculty have priority. Note: Any or all privileges granted emeritus faculty may be rescinded should it become necessary to do so."
Retirees’ Association

Retiree Benefits

The University of Montana appreciates your service. To acknowledge your contribution, UM offers a variety of perks and privileges. These fall into two categories: those for all retirees and additional privileges for lifetime retirees (15+ years of service). A Grizzly Card must be presented to access many of the privileges described on this page.

Privileges for All UM-Missoula Retirees

Bus Pass

Campus Recreation - Grizzly Pool Access
UM retirees and spouses may obtain access to the Campus Recreation Center and Grizzly Pool for $10/month. Questions? Call 243-2902.

E-mail Account
Retirees may retain their UM e-mail account. Ask your IT department to not close it.

Mansfield Library Borrowing Privileges
Retirees receive the same privileges as a "Mansfield Borrower." Questions? Call 243-5518.

UM Computer Labs
Retirees may access labs using their NID and password. Questions? Call 243-HELP.

Insurance
Retirees can elect to continue on the UM insurance plan, but must purchase the coverage at their own expense. Application must be made within 93 days of first becoming eligible for Retiree benefits. Failure to do so results in permanent forfeiture of eligibility for all UM insurance coverage.

Wireless Services
UM Retirees can have IT set up wireless service on campus for personal laptops. For more information, visit the IT website.

Additional Privileges for Lifetime Retirees (15+ Years of Service)

Athletic Tickets
Two complimentary tickets per game to UM sponsored athletic events, including football, basketball, volleyball and soccer games (excludes certain events). Tickets can be obtained in person from the Adams Center Box Office on the Monday prior to the game. For details, call 243-4051.

Bookstore Discounts
10% discounts on most items at the University Bookstore. Textbooks, computer hardware and software are not included. Questions? Call 243-1234.

Mansfield Library Borrowing Privileges
Lifetime retirees retain the same borrowing privileges as current faculty and staff. For information, call 243-5518.

Parking

Theatre Tickets
Two complimentary tickets to productions by the School of Theatre & Dance (see the online calendar for events). Questions? Call 243-4561.