Summary
During FY 2013, the MSU Association of Retired Faculty (ARF) established closer collaborations with both MSU Human Resources (HR) and the Alumni Foundation. At the invitation of Laura Underkofler, HR Retiree Benefits Specialist, the ARF Executive Committee began meeting in the HR conference room where it is convenient for HR staff to participate. The ARF office soon will be relocated to the same building. During the summer of 2013, ARF’s office will move from Culbertson Hall to Rooms 206 & 207 in the Nopper Building on the MSU Innovation Campus (formerly called the Technology Park). This location also houses HR and some components of the Alumni Foundation. Parking is plentiful and the office is easier to reach than the former office.

ARF documented the need for a phased-retirement policy for ORP retirees and presented its position statement to the active faculty and the MSU administration. The MSU Faculty Senate is now leading the effort to create an official phased-retirement policy for ORP retirees.

ARF proposed to the MSU administration that upon retirement, each faculty member should receive a brochure showing the benefits and privileges accorded faculty retirees. To illustrate the concept, ARF created a prototype tri-fold brochure that contained ARF’s recommended list of rights and privileges. Most items in ARF’s list already are available at MSU, some are new to MSU but available to University of Montana retirees, and a couple items are new to both campuses. HR agreed with the brochure concept; consequently, HR staff began crafting a brochure that will list already-existing rights and benefits for retired faculty. ARF will continue to advocate for MSU retirees, seeking a benefits and privileges package that, at least, achieves parity with the U of M.

The Montana Teachers’ Retirement System (TRS) was faced with a $600 million shortfall in its projected liability. The TRS called for comments or suggestions for removing that liability. ARF submitted a letter stating its opinion that all TRS members at MSU, whether active or retired, should be exempt from any adverse changes, especially two changes that were under consideration: (i) reducing the guaranteed annual benefit adjustment (GABA, 1.5%) and (ii) reducing the multiplier (now 1/60) that determines the pension amount. These important components of the TRS pension should not be changed after a faculty member has enrolled or retired. In a subsequent newsletter, TRS indicated that its recommendation would maintain the existing GABA and multiplier. However, the 2013 state legislature passed a bill that reduced the GABA to 0.5% until such time as the projected liability is almost eliminated. One can expect that this legislative action will be challenged in the courts.

In FY 2013, ARF continued its efforts to secure the best possible health insurance options and to help retired faculty make a prudent selection from among those options. Retired faculty health insurance plans experienced financial pressure due to unfunded liability rules and evolving national health insurance policies. ARF members on key Montana University System (MUS) benefits committees were able to participate in the evaluation and selection of MUS health insurance options. During the Choices enrollment period, ARF sponsored a variety of informational presentations and consultation sessions for faculty retirees in addition to those provided by HR. Presently, ARF has two representatives on the IUBC Retiree and Pension Task Force whose mission is to analyze and update MUS retirement/savings procedures and programs.

During FY 2013, ARF continued its liaison, program, and service functions, including:
- The Brown Bag Luncheon Series of presentations.
- Served as a key information source for retirees, faculty contemplating retirement, and faculty in the process of retiring.
- Met with MSU President Cruzado & Provost Potvin to discuss issues of mutual interest.
• Attended meetings of the various MSU Councils.
• Visited MSU dean and department heads to discuss strategies for maintaining connections between retired faculty and MSU.
• Expanded and updated its web site.
• Regular announcements via email and an occasional newsletter, all to keep the retired faculty informed about activities, current issues, and forthcoming events.
• Participated in a national meeting of university retirement organizations.

The most serious problem facing ARF is that too few retired faculty are active participants. In order to continue timely advocacy for retired faculty and to make progress on projects for improving both retirement policies and retiree connections to MSU, more retired faculty volunteers are needed to work on projects and to serve as officers.

In 2014, ARF will take on focused projects in addition to its on-going services & programs. ARF will continue to advocate for retired faculty benefits & privileges. ARF will collaborate with the university in creating a master list of faculty retirees. ARF will conduct a survey to document professional activities performed by MSU retired faculty. ARF will submit a proposal to establish an Emeritus College at MSU.

Dues

<table>
<thead>
<tr>
<th>Category</th>
<th>Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular dues</td>
<td>$15/yr</td>
</tr>
<tr>
<td>New retiree</td>
<td>No dues during 1st year</td>
</tr>
<tr>
<td>Associate members</td>
<td>No dues</td>
</tr>
</tbody>
</table>

Support for ARF beyond regular dues

<table>
<thead>
<tr>
<th>Category</th>
<th>Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustaining members</td>
<td>$25</td>
</tr>
<tr>
<td>Contributing members</td>
<td>$50</td>
</tr>
<tr>
<td>Benefactor</td>
<td>$100</td>
</tr>
<tr>
<td>Life-time membership</td>
<td>$200</td>
</tr>
</tbody>
</table>

Financial

As of June 30, 2013, ARF had cash on hand of $2430 and no out-standing debts. Funds derived from dues are used primarily to support brochures, the Capstone Lecture series, and the monthly luncheons. ARF appreciates the operations support provided by the MSU Office of the Provost, including office space, office furnishings, telephone service, a network-connected computer and associated equipment, supplies, dues for ARF’s membership in the Association of Retirement Organization in Higher Education (AROHE), and support to attend regional and national retirement organization meetings.

Background

Mission: MSU Association of Retired Faculty

The Association of Retired Faculty (ARF) at Montana State University was founded in 2004 to
• foster the benefit, interests and well-being of retired faculty through social, educational, and promotional activities and
• encourage continuing retiree contact and involvement with the University, thereby helping to enrich the personal and professional lives of persons in the University and the greater community.

Membership

All faculty members who retire from MSU are eligible for voting membership in ARF. Soon-to-be-retired faculty, retired faculty members from other institutions of higher learning who have a relationship with MSU, and spouses of MSU retired faculty are eligible for associate (non-voting) membership. During FY 2013, ARF had 35 dues-paying members and a few newly retired members for whom dues were waived.

FY 2013 officers

President: Pierce Mullen
Vice-president: Open
Secretary/Treasurer: Don Mathre
Director of Programs: Jerry Coffey
During FY 2013, ARF met with organizations that serve the faculty of the university (including the Associated Faculty of MSU and the MSU Faculty Senate) to discuss the need for new retirement policies, to ask for support in crafting them, and to develop strategies for securing acceptance. The active faculty agreed to collaborate in securing such policies.

ARF members, being already retired, have no vested interest in retirement incentives or phased retirement. Post retirement employment policy is tightly connected to phased retirement. Therefore, the promotion of new policies for retirement incentives, phased retirement, and post-retirement employment are the responsibility of active faculty. The MSU Faculty Senate has developed a phased-retirement policy for ORP retirements and will guide it through the approval process. Although not actively involved, ARF members are willing to share their knowledge and experience.

At present, ARF is focusing exclusively on the last of the four bullet items (above) – the rights, benefits, and privileges accorded retired faculty at MSU. By offering a generous list of rights, benefits, and privileges to retired faculty, MSU can build good will among retired faculty, encourage retirement by senior faculty, and increase the morale and retention of active faculty. At other universities including the University of Montana, upon retirement a faculty member is handed a list of rights, benefits, and privileges for retired faculty. At MSU, there is no such list. Although ARF has compiled a list based on studying the faculty handbook, searching MSU web pages, and interviewing MSU officers, it isn’t official or complete (http://www.montana.edu/retired/Advantages.htm).

During FY 2013, ARF proposed to MSU a list of rights, benefits, and privileges. It was based primarily on a survey of policies at peer institutions. The list is displayed in the Appendix. The administration has not acted on the proposal. However, Laura Underkofler, HR Retiree Benefits Specialist, began to craft a brochure for HR to distribute to retired faculty. At present, Laura’s brochure will list only the existing rights, benefits, and privileges. In FY 2014, ARF will continue its advocacy for the whole list.

**Purpose of this report**

ARF submits a report to its membership at the end of each fiscal year. The report is published on the ARF web site and is distributed electronically to the membership and to MSU officials including the MSU President, Provost, Faculty Senate, Human Resources, and Alumni Foundation. This report describes ARF’s activities during FY 2013 and its plans for FY 2014.

**FY 2013 programs and services**

**MSU and MUS retirement policies**

Possibly because of the historical dominance of TRS retirements, the MSU retirement policies are more restrictive than at peer institutions where defined-contribution plans like the Optional Retirement Program (ORP) are the standard. In the last decade, many universities have developed a number of strategies and policies that provide flexible retirement options for ORP faculty retirees. ARF believes that MSU should follow suit and establish new retirement policies for making retirement more attractive and providing an opportunity to transition into retirement. During the transition period the retiring faculty member possibly could remain engaged in teaching, research, or service activities at the university, but at a reduced level. Because ORP retirements are just beginning at MSU, this is an opportune time to create policies that will allow MSU to retain the knowledge and experience of senior faculty and to hire potential-laden young faculty. Consequently, ARF prepared a position statement requesting the creation of new, improved MSU policies for

- retirement incentives,
- phased retirement,
- post-retirement employment, and
- the rights, benefits, and privileges accorded retired faculty.

**Additional members of the ARF Executive Committee in FY 2013**

Marty Hamilton, Past President of ARF
Ken Hopner, Past IUBC Retiree Representative
John Jutila, Past President of ARF
Bob Swenson, Past President of ARF
Doug Young, Current IUBC Retiree Rep
**TRS pension**

Although the situation in Montana is not as grim as in some states, the Montana TRS was faced with a projected liability shortfall of $6×10^9. Most of the ARF membership is in TRS and therefore it was important for ARF to evaluate program changes under consideration by TRS. In its newsletter, TRS presented a list of suggested remedies for resolving the shortfall and it asked for the opinions of TRS members. ARF submitted its opinion that all TRS members at MSU, whether active or retired, should be exempt from any adverse changes, especially reducing the guaranteed annual benefit adjustment (GABA, 1.5%) or reducing the multiplier (1/60) that determines the pension amount. In a subsequent TRS newsletter, TRS said it would recommend continuation of the existing GABA and the multiplier. However, the 2013 Montana Legislature ignored that recommendation and passed a bill that reduces the GABA to 0.5% for TRS retirees until such time that the shortfall is almost eliminated. Although ARF has not decided on a definite course of action in response to this unfair law, it is considering various alternatives, including support of a forthcoming legal challenge.

**Health insurance benefits**

Potential changes to the Montana University System (MUS) health insurance program are a concern for retirees. During this past year ARF continued its efforts to inform retired faculty about medical insurance choices. ARF member Doug Young served on the MSU Benefits committee and the MUS Interunit Benefits Committee (IUBC). The IUBC is influential in shaping retirees’ health care options and committee membership requires a serious commitment of time and energy. ARF expresses its gratitude to Doug for performing this valuable service.

The health insurance options (Choices) for retired faculty are difficult to compare. To help the ARF membership make informed choices, Ken Hapner prepared an unofficial, but very informative, spreadsheet of relevant data for comparing the offered choices. In addition, ARF Executive Committee members (Ken Hapner, Doug Young, Jerry Coffey, and Don Mathre) collaborated with MSU HR and the MUS Benefits office to organize Choices informational meetings. There were two sessions on benefits for retirees for 2013-14. The first was on April 18 in the Wingate Holiday Inn Express. The second session was on April 19 in the Days Inn. For retirees who needed special information or couldn’t attend the sessions, consultations were held on Tuesday, April 30, and on Wednesday, May 8, in the HR Conference Room, Nopper Building. Laura Underkofler and several members of ARF with experience in benefits were available to help the retirees. In addition, Ken Hapner scheduled individual meetings with retirees to discuss the health insurance choices and the enrollment process.

**Dissemination of retirement information**

ARF gathers and disseminates information about planning for retirement, navigating the retirement process, and being retired. The primary and official sources of retirement information are the MSU Human Resources (HR) office, the Teachers Retirement System, or TIAA-CREF. For answers to lingering questions, active or retired faculty members are encouraged to consult ARF’s on-line documents or to contact ARF and arrange a meeting with a retiree volunteer. Based on its members’ practical experience, ARF can provide information that complements the essential information provided by the official sources.

In collaboration with MSU Human Resources, Jerry Coffey presented pre-retirement workshops for MSU faculty. Jerry also met separately with individuals who needed additional information about planning their retirements. ARF notes with appreciation the retiree assistance that Laura Underkofler, HR Retiree Benefits Specialist, provides retirees.

**Liaison with MSU**

During FY 2013, ARF and the MSU Office of Human Resources became more closely linked. At the invitation of Laura Underkofler, the ARF Executive Committee began meeting in the HR conference room where it would be convenient for HR staff to participate. At one meeting, Laura introduced Cathy Hasenpflug who is the new director of human resource operations. Payroll, benefits, retirees, taxes, and international students
will fall under Cathy’s purview. HR staff attends the Brown Bag Luncheon Series and participates in policy and program discussions. Because of their experience and knowledge of retirement issues and policies, their contributions have been very informative and helpful.

During FY 2013, ARF held multiple meetings with the Alumni Foundation. The two entities have many common goals and concerns and will benefit from collaborative initiatives.

ARF continued its liaison program with MSU administrators, staff, committees, and councils. On July 30 and on Nov. 19, 2012, the ARF Executive Committee met with President Cruzado, and Provost Martha Potvin to discuss issues of mutual interest, to inform the MSU leaders about ARF’s progress and plans, and to seek their guidance and assistance.

In FY 2013 ARF representatives attended meetings of the MSU Councils. Also ARF member Tom Wessel met with various MSU administrators according to a schedule for visiting each department head and college dean at least once every three years. New department heads and new deans are visited when they arrive on campus.

He visited the Deans of Business, Engineering, Nursing, and Agriculture, plus the dept heads of Ag Econ and Econ, Modern Languages, Land Resources, Native American Studies, Physics, Animal and Range Science, and Plant Science and Plant Pathology. Nick Rea, the new Dean of Letters and Science, proactively scheduled a brief meeting with the ARF Executive Committee to learn about ARF and discuss areas of potential collaboration.

The meetings with MSU administrators indicated that there was general enthusiasm for ARF’s goals. By maintaining good communication with university constituencies, ARF believes it will be informed about proposed or forthcoming policies that affect retirees and can advocate for retirees when such policies are being developed.

**Participation in Fall Commencement at MSU**

Provost Potvin issued a special invitation for retired faculty to take part in MSU commencement ceremonies. A significant group of retired faculty accepted the invitation to march in Fall Commencement held on Dec 15, 2012, in the Brick Breeden Fieldhouse. Retired faculty members were seated on the stage and received official recognition during the ceremony. MSU plans to acknowledge retired faculty in future Fall Commencements as well. ARF appreciates Provost Potvin’s efforts to include and recognize MSU’s retired faculty.

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### Recent events of importance to faculty retirement at MSU

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
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<tbody>
<tr>
<td>1993</td>
<td>All new faculty hires were required to enroll in the Optional Retirement Program (ORP); TRS was no longer an option</td>
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<tr>
<td>1994</td>
<td>Mandatory retirement age illegal for tenured faculty</td>
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<tr>
<td>1998</td>
<td>Universities allowed to offer voluntary retirement incentives that are age dependent; this decision led to a variety of new ways to encourage retirement and to new rights, privileges, and benefits for retirees</td>
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<tr>
<td>2002</td>
<td>Inaugural meeting of AROHE which became the clearing house and repository for retiree information and programs</td>
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<td>2003</td>
<td>AAUP published its Survey of Changes in Faculty Retirement Policies</td>
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<tr>
<td>2004</td>
<td>MSU Association of Retired Faculty founded</td>
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<tr>
<td>2008</td>
<td>The “great recession” diminished the value of many ORP investments</td>
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<tr>
<td>2011</td>
<td>MUS IUBC partitioned health insurance for retired faculty into two distinct premium classes based on the Medicare eligibility of the retiree &amp; spouse</td>
</tr>
<tr>
<td>2013</td>
<td>Montana legislature reduced the TRS retirees’ GABA from 1.5% to 0.5%</td>
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The ARF webmaster Dwight Phillips updated and extended the ARF site to provide a reliable, current source of information. The web pages announce forthcoming events, facilitate communication among retirees, document ARF policies and procedures, and provide accurate information for both retirees and faculty contemplating retirement.

**Newsletter** ([http://www.montana.edu/retired/links.htm](http://www.montana.edu/retired/links.htm))

Don Mathre, Secretary, regularly sent electronic announcements and an occasional newsletter to keep the retired faculty informed about activities, current issues, and forthcoming events. The ARF newsletter (*The Bow Wow Times*), which is sent to the membership as an email attachment, lists activities, upcoming events, ARF projects, and new developments in federal, state, or university policies that potentially affect retired faculty.

**Monthly luncheon presentations**

- The ARF Brown Bag Luncheon Series hosts a presentation once a month. Each talk is by a knowledgeable expert on a topic of current interest. The series attracts retired and active faculty to the same forum and stimulates conversation about issues of common interest. The FY 2013 series included:
  - **Open discussion** – “Rights and privileges accorded MSU retirees; phased retirement plans for MSU ORP retirees.” September 26, 2012
  - **Brad Balkin**, Denver office of TIAA-CREF, “Retirement issues, with an emphasis on financial management issues.” October 10, 2012
  - **Dr. John Peters**, MSU Department of Chemistry and Biochemistry, "Astrobiology at MSU: from Yellowstone Park's thermal microorganisms to the future of space travel" John’s laboratory receives funding from NASA to investigate the parameters that govern habitability for space exploration and the search for life beyond Earth. Nov. 14, 2012
  - **Joe Thiel**, MSU’s most recent Rhodes scholar, “How one becomes a Rhodes scholar.” After a brief presentation, Joe took questions from the audience, many of which related to Joe’s experiences at MSU. Some of the questions were answered by his wife Elizabeth "Bizz" Browning, who has received a Fulbright Teaching Assistantship to Germany. January 16, 2013
  - **Dr. David Klumpar**, Research Professor of Physics with the MSU Space Science and Engineering Laboratory, spoke on “Made in Montana by Montana Students: MSU's Earth Orbiting Satellites”. The program prepares students for high tech careers. MSU’s first satellite, which has been operating in orbit since Oct. 28 2011, passes over MSU several times each day allowing student operators to communicate with the satellite via radio. The next step will be to download satellite-captured data. February 20, 2013
  - **Dr. Richard A. Damon, MD**, local physician, “Failure of the health care system in comparison to other ‘developed’ countries and what should be done”. He explained why the Patient Protection and Affordable Care Act fails to satisfy many important needs. March 20, 2013
  - **Connie Welsh, Director of Benefits, MUS, (http://choices.mus.edu/Retirees.asp) and colleagues, “Upcoming changes in the benefits program for retirees.” ARF hosted a catered lunch for this presentation. April 3, 2013
  - **David Quammen**, local author, “Emerging zoonotic diseases.” He discussed his new book, Spillover, which presents ‘the ecology and evolutionary biology of scary emerging viruses.’ David is the award winning author and a regular contributor to National Geographic. Since its release, Spillover has received rave reviews in the national press. In addition to discussing the science, David discussed the effort (travel, interviews, reading, and research) required to write Spillover. April 17, 2013

ARF thanks all presenters and attendees. The Brown Bag Luncheon talks were fascinating, informative, and well-attended.
Retiree Network

During FY 2013, the Provost provided funds for ARF President Pierce Mullen to attend the national meeting of AROHE October 24-27 in Chapel Hill, North Carolina. He was a presenter on small and newly organized associations and participated in three discussion groups. Issues facing MSU and similar institutions are similar to those around the country, namely to attract and retain members, to secure administrative support and to provide stimulating programs for the membership. The California University System, the New York system of higher education, and other state groups all belong to AROHE and have led the way on emeritus and emeritus/staff organizations. Most nationally recognized institutions have full time paid personnel to perform all administrative duties connected with their retiree activities. Many of these have their own buildings for retired faculty offices and meeting areas. What we at MSU can learn from them is the day by day hard work of building a solid foundation for expansion and development of our retiree interests and resources. ARF thanks the Provost for that support and hopes that it will be available for the national meeting next year in Minneapolis.

ARF has maintained regular contact with the nascent retiree association at the University of Montana. When the folks in Missoula are ready, the two associations plan to meet on a regular basis. The associations will collaborate on policies and proposals that pertain to retired faculty in the MUS.

FY 2014 Information

FY 2014 ARF officers

President: Open
Vice-president (President-elect): Open
Secretary/Treasurer: Open
Director of Programs: Jerry Coffey (jerome.coffey@msu.montana.edu)

Call for participation

Because of its effective advocacy for retired faculty and its successful programs for retirees, ARF has become a respected component of MSU and the MUS system. However, in order to continue timely advocacy for retired faculty and to make progress on projects for improving both retirement policies and retiree connections to MSU, more retired faculty members must get involved. A serious problem facing ARF is that too few retired faculty are active participants. ARF urgently needs retirees to work on projects & services and to serve as officers. If you are eligible for ARF membership, please join your colleagues in working at a comfortable retiree pace towards worthwhile and satisfying goals – volunteer by contacting anyone on the ARF Executive Committee. Note especially that ARF needs a President, Vice-president, and Secretary/Treasurer. An election will be held at the end of the summer, 2013. Submit your nominations to Don Mathre. You can volunteer for an office by nominating yourself.

FY 2014 Initiatives

In addition to its regular activities (such as lunch-eons, exit interviews, Capstone Lectures, and advocacy for retirees), ARF plans to work on some or all of the initiatives described below.

ARF’s 10th Anniversary Celebration

In 2014, ARF will collaborate with MSU in planning and hosting various anniversary events, some of which may become annual affairs. The ARF office relocation to the Nopper Building

In the summer of 2013, the ARF office will move from Culbertson Hall to the more accessible space, Rooms 206 & 207 in the Nopper Building.
Building on Technology Blvd (turn south at junction of W. College and S. 23rd) on the MSU Innovation Campus (formerly called the Technology Park). The new location is especially convenient because HR and components of the Alumni Foundation are in the Nopper Building. Also, parking is easier than on the main campus.

**Rights, benefits, and privileges**

In FY 2014, ARF will continue is advocacy for its proposed list of rights, benefits, and privileges. The effort will be coordinated with other faculty groups in the state as well as at MSU.

**Emeritus College**

On many campuses, a faculty member can request that, upon retirement, the faculty member’s appointment is transferred from his/her home department/program to the Emeritus College. Retired faculty who wish to remain connected to the university can do so very easily via the Emeritus College. ARF will submit to the MSU administration a proposal for establishing an Emeritus College at MSU. The Emeritus College would be an official, modestly funded, Board of Regents approved, program at MSU. ARF would be absorbed as a component of the Emeritus College.

**Directory of retired faculty**

There is no official list of MSU faculty retirees. ARF volunteers Tom Roll, Bob Swenson, and Don Mathre have merged incomplete lists from various sources, but it is difficult to update and maintain. ARF has discussed this need with HR and the MSU Alumni Foundation, but there are a number of obstacles to a reliable directory of MSU retirees. ARF will investigate the cost of developing an on-line registration system for retired faculty and spouses to use for registering or withdrawing from the directory.

**Update the ARF Constitution & By-laws**

After 10 years of operation, ARF will convene a committee to review and update its governing documents.

**Survey of MSU retired faculty: post-retirement professional activities**

Anecdotal data indicate that many MSU faculty members remain professionally active after retirement. Some continue to teach and mentor. Some conduct research, write, edit, review, or lecture. Some start up a company or work with companies or governmental agencies that use their professional knowledge and experience. Post-retirement professional contributions might be within the university or outside of the university. Such contributions obviously are beneficial to the university, state, nation, and professions. It would be informative to determine the total amount of professional activity among retired faculty. During FY 2014, ARF plans to conduct an informal survey via its newsletter.

**Support Group**

ARF intends to provide, or arrange for, social support to retirees or spouses. The first step will be to recruit a volunteer social secretary. That secretary would manage a clearing house for social needs including reports of ailing retirees who should be visited regularly, or of isolated retirees who should be checked for well-being, or of a deceased retiree or spouse whose survivor would appreciate a letter from the MSU community.
Appendix:  ARF Proposed List of Benefits & Privileges for MSU retired faculty

Access to MSU Facilities & Services

CatCard Identification  Retirees and/or spouses will be issued a CatCard at the faculty rate [www.montana.edu/catcard]; the CatCard 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., receive 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] (moot)

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.)

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

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

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 VP of Research (new)

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 (a benefit at UoM)

Performing Arts  Two complimentary tickets for MSU theatrical productions and concerts (a benefit at UoM)