

Penn Association of Senior and Emeritus Faculty (PASEF) 2021–2022 Annual Report

JULY 19, 2022 | VOL 69 ISSUE 1 ([HTTPS://ALMANAC.UPENN.EDU/VOLUME-69-NUMBER-1](https://almanac.upenn.edu/volume-69-number-1)) | NEWS | PRINT

Overview

Founded in 2004, the Penn Association of Senior and Emeritus Faculty (PASEF) advocates for and supports the interests of members, organizes programs and activities for them, encourages them to be active in the intellectual and social life of the University and provides service to the University and the community. In order to accomplish these goals, PASEF educates and advocates for faculty throughout retirement; organizes intellectual and social events such as lectures and excursions to cultural attractions for its members; and creates opportunities for PASEF members to continue to make contributions to the University, community, and their professions. As stated in the bylaws, PASEF's membership includes senior (faculty aged 55 or above) and emeritus members (for the purpose of PASEF, are former members of the faculty of the University who have officially retired from active service) in the following categories: standing faculty, and associate professors and professors in the associated faculty who are research faculty, full-time academic clinicians, and full-time practice professors. Current membership numbers 1,262 senior faculty and 780 emeritus faculty.

PASEF is a member organization of AROHE, the Association of Retirement Organizations in Higher Education. The Association of Senior and Emeritus Faculty (ASEF-PSOM) is an analogous organization at the Perelman School of Medicine; its senior and emeritus faculty are also PASEF members. The two organizations regularly cooperate in planning joint programs and activities.

The PASEF website is provost.upenn.edu/pasef (<http://provost.upenn.edu/pasef/>).

Administration

Governance and administration. PASEF operates under a set of bylaws and is governed by a council which meets monthly during the academic year. The President, President Elect, and Past President form the Steering Committee. Council members for 2021–2022 are listed in the Appendix. PASEF receives an annual budget from the Provost and reports to the Vice Provost for Faculty, Professor Laura Perna.

Facilities and support. PASEF has an office and an adjacent lounge on the first floor of Duhring Wing in the Furness Building, next to the office of the Faculty Senate. Both the office and the adjacent lounge can accommodate meetings of small groups. Staff support is provided with exceptional care and diligence by Sarah Barr, PASEF's full-time coordinator. During the past year able assistance has also been given by Arberetta W. Bowles, executive director, Office of Academic Affairs, Perelman School of Medicine, and her staff. We are grateful for the intellectual, collegial, and financial support of Vice Provost Laura Perna. Personally, I thank the PASEF Steering Committee and Council and our ASEF-PSOM colleagues for their support, guidance, and collaboration.

Retirement

PASEF provides resources to aid senior faculty in planning the transition to retirement, as well as support for managing retirement. The continued closing of most in-person activities on campus due to COVID-19 created challenges. While we successfully held in-person events later in the spring, those events were more challenging because of their hybrid nature (live-streaming, in-person, and video). Our work this year included our involvement in attaining the hearing aid benefit, outsourcing retirement benefits, communicating our message throughout the Penn community, acknowledging and understanding needs of members newly included in PASEF and ASEF, expanding retirement programs, continuing to update our guide to retirement planning, hosting the reception for newly emeritus faculty, and continuing semi-annual meetings with Human Resources.

Hearing Aid Benefit. Because many PASEF members had questions about the new hearing aid benefit, we pursued exchanges and meetings with HR and Health Advocate about how the benefit was being implemented. We

followed up with articles in our newsletter and additions to our website. Changes are ongoing and will be addressed in a timely manner in our communications.

Outsourcing Retirement Benefits. Last year, Peter Kuriloff, Marshall Meyer and the late Joel Bennett formed a team for the Senate Committee on the Administration (SCOA) charged with looking into the outsourcing of benefits administration. With the full support and necessary aid of PASEF, the team surveyed retiring and retired faculty and produced a report that was circulated to the faculty via Almanac and to Human Resources. The report showed that a substantial group of responding faculty had significant issues with WageWorks. This year SCOA was charged with furthering its inquiry into outsourcing. As SCOA did not have the resources to pursue the charge, it delegated this work to PASEF and the University Council on Personnel Benefits. Janice Bellace and Peter Kuriloff, representatives on both committees, along with PASEF leadership, examined the issues relevant to PASEF since PASEF was already concerned about the services provided by some outside vendors based on comments received from some retirees.

Drs. Kuriloff and Bellace and PASEF submitted their report to SCOA's Annual Report to share progress made on these issues. They recommended the following which will guide PASEF during the upcoming year:

1. PASEF will focus on the administration of retiree benefits.
2. Insofar as outsourcing of benefits administration remains on the agenda of the Faculty Senate or other bodies, PASEF will join the conversation but not lead the conversation.
3. PASEF will continue to interface with HR, faculty affairs coordinators in the various schools, and the Provost's Staff Committee Subcommittee concerning the administration of retiree benefits.

Communicating our message throughout the Penn community. We established meetings with key stakeholder groups. With the support of Vice Provost Perna, we established the practice of meeting yearly (and as needed) with the faculty affairs coordinators throughout the 12 schools of the University and with the Provost Staff Conference Subcommittee. Last year, the meetings were held in January and February, although earlier in the school year may be advantageous. The faculty affairs coordinators were added to our mailing list at their suggestion.

We redesigned our newsletter, with special thanks to Sarah Barr and Carolyn Marvin (council member). The new design uses a more engaging format. We publish the newsletter each month except July and August.

Acknowledging and understanding needs of members newly included in PASEF and ASEF. We worked with ASEF to incorporate associate professors and professors in the associated faculty who are research faculty, full-time academic clinicians, and full-time practice professors. Many ASEF members who are retired associated faculty are not eligible for the emeritus title and therefore not granted the rights and privileges outlined in the Faculty Handbook section II.E.9.C., Rights and Privileges of Retired Faculty Members. Of particular concern are access to the Penn Libraries and email, especially for researchers and other associated faculty who have pursued distinguished academic careers at Penn over several decades and wish to remain active after retirement. PASEF and ASEF are working with the Provost's Office to gain greater access to these key University and school resources for retired associated faculty, starting with email, Penn cards, and library access.

Expanding retirement programs. PASEF expanded programming about retirement from three to five programs this academic year.

Nov 9	<i>Medicare and Social Security: Concerns of Retiring and Retired Faculty</i>	92 attended on Zoom	231 have accessed video as of June 1, 2022
Dec 8	<i>Financial Security Panel</i>	35	183
Feb 10	<i>Negotiating the Retirement Transition: What's Next?</i>	89	167
Mar 22	<i>Exploring Living Options in Retirement</i>	48	146
Apr 5	<i>Nuts & Bolts of Retirement</i>	74	9

Continuing to update our guide to retirement planning. The 15th edition of PASEF's publication *Hitchhiker's Guide to Faculty Retirement* (<https://provost.upenn.edu/pasef/hitchhikers-guide-faculty-retirement>), under the editorship of Martin Pring and Janet Deatrck, was published in January. Sections on financial planning for retirement, transition to emeritus status, and retiree relations with the University are included, and the publication is available on the PASEF and ASEF-PSOM (<http://www.med.upenn.edu/asef/>) websites. Both websites also house a guide to continuing care retirement communities (<https://provost.upenn.edu/pasef/guide-retirement-communities>) (CCRCs)

in the Philadelphia area which is currently being updated.

Our website is updated on an ongoing basis and continues to be visited frequently. The landing page of the website got over 1,000 views and the other pages each got hundreds of views between June 1, 2021, and May 31, 2022.

Hosting reception for newly emeritus faculty. This year's Newly Retired & Emeritus Faculty event with ASEF was held on May 19, 2022. The event honored 50 retirees and was held in person and live-streamed.

Continuing semi-annual meetings with Human Resources. PASEF leadership is continuing the practice started last year of regularly scheduled meetings with the Vice President for Human Resources to discuss policies that affect emeritus faculty. PASEF's advocacy regarding issues pertaining to WageWorks/HealthEquity yielded an announcement that the University will be transitioning to BRI in October 2022.

Activities and Events

Lectures. PASEF sponsors lectures throughout the academic year. These are open to all members of the University community and span a wide range of topics which are of general interest. Historically there were monthly lunchtime lectures at the University Club and featured fall and spring lectures. Due to COVID-19 requirements, most lectures for this year were live streamed and all are also available for viewing on the PASEF website (<https://provost.upenn.edu/pasef/events-2021-2022>).

Noontime lectures. We held 7 lunchtime lectures.

- John L. Jackson Jr., Walter H. Annenberg Dean of the Annenberg School for Communication and Richard Perry University Professor, spoke on Race, Religion, and the African Hebrew Israelites in Jerusalem (October 20)
- Dorothy Roberts, George A. Weiss University Professor of Law and Sociology and the Raymond Pace and Sadie Tanner Mossell Alexander Professor of Civil Rights, spoke on Fatal Invention: Recreating Race in the Genomic Era (November 16)
- Jacques deLisle, Stephen A. Cozen Professor of Law and Professor of Political Science; director, Center for East Asian Studies spoke on The Path of the Law in the People's Republic of China (November 30)
- Ian Lustick, Bess W. Heyman Chair in Political Science, spoke on Israelis and Palestinians: The Problem of "Solutionism" (January 19)
- Martha J. Farah, Annenberg Professor of Natural Sciences, spoke on Brave Neuro World (February 9)
- Kathleen M. Brown, the David Boies Professor of History, spoke on the Penn & Slavery Project (March 9)
- Kent Smetters, the Boettner Professor of Business Economics and Public Policy, spoke on PWBM Public Policy Metric (May 31)

Fall and Spring lectures.

- Governor Edward G. Rendell spoke on Politics 2021-Can the American Democracy Survive? (October 14)
- Duncan Watts, Stevens University Professor, spoke on How Common is Common Sense? (April 26)

Fall outing. Each year PASEF and ASEF-PSOM jointly plan fall and spring outings to locations of cultural or historical interest in the Philadelphia area. These events were not held this year due to COVID-19 requirements.

Speakers Bureau. With encouragement and funding from then Vice Provost Anita Allen, PASEF launched its Speakers Bureau in the spring of 2016. This work was spearheaded by Jack Nagel as chair of the Speakers Bureau Committee. The bureau enables community groups, including retirement communities, civic, social, and religious organizations, and high schools, to identify and invite PASEF members to speak to audiences in the Philadelphia area. The current roster of speakers number 19 and includes both senior and retired Penn faculty from schools across the University. Information about the bureau (<https://provost.upenn.edu/pasef/speakers-bureau>) and the speakers and their topics is on the PASEF website. Opportunities were limited this year due to COVID-19. Nonetheless, four speaking engagements from the bureau were held virtually this year. We are currently updating and enlarging the roster of speakers and topics. We have so far added six speakers. We will next be canvassing community groups to garner engagement.

Communications with members. (See above re: newsletter). PASEF published a newsletter monthly during the academic year.

Volunteers to help Penn. For the third year, PASEF volunteers assisted the Penn Global Engagement Fund by evaluating proposals submitted as part of a competitive grant program. We also have a Community Involvement Committee that is planning for unique volunteer opportunities for our members in the Free Library of Philadelphia and/or school libraries.

Faculty Senate and University Council

PASEF sends non-voting representatives to the Senate Executive Committee, four Senate committees, and the University Council Committee on Personnel Benefits. The Senate committees are the Senate Committee on Faculty and the Administration, the Senate Committee on Faculty and the Academic Mission, the Senate Committee on Students and Educational Policy, and the Senate Committee on Faculty Development, Diversity, and Equity.

PASEF Annual Election

Janice Bellace is the President-Elect, Brian Salzberg is the Secretary, David Manning is the SEC representative, and Janice Bellace is the representative to University Council Committee on Personnel Benefits. Newly elected at-large council members who will serve three-year terms are Andrew N. Binns (SAS), Edward I. George (Wharton), and Peter J. Kuriloff (GSE)

In Memoriam-PASEF Council

John C. Keene served as a member of PASEF Council as a member at-large from 2016–2020 and as the Secretary from 2020 to the time of his death.

In addition, two PASEF past presidents died this year. Benjamin Shen was President from 2005–2006. Rob Roy MacGregor was President from 2013–2014.

*Submitted by
Janet A. Deatrck, President (2021-2022)*

Appendix

PASEF Council Members, 2021–2022

- Sherrill L. Adams–Dental Medicine (Biochemistry)–at-large member of Council; Faculty Development, Diversity & Equity (SCFDDE) representative
- Roger M. A. Allen–Arts & Sciences (Near Eastern Languages and Civilizations)–representative to Faculty and the Academic Mission (SCOF)
- David P. Balamuth–Arts & Sciences (Physics & Astronomy)–at-large member of Council
- Janice Bellace–Wharton (Legal Studies & Business Ethics)– representative to University Council Committee on Personnel Benefits (PBC); chair, Nominating Committee
- Peter Conn–Arts & Sciences (English)–at-large member of Council; chair, Program Committee
- Janet Deatrck–Nursing (Family & Community Health)–President, chair of Steering Committee, Co-editor of The Hitchhiker’s Guide to Faculty Retirement
- John C. Keene–City and Regional Planning (Design)–Secretary
- Peter Kuriloff–Graduate School of Education–Faculty and the Administration (SCOA) representative
- Janice Madden–School of Arts & Sciences (Sociology)–Past President, archivist
- David R. Manning–Penn Medicine (Pharmacology)–at-large member of Council; representative to Senate Executive Committee (SEC)
- Mitch Marcus–Engineering & Applied Science (Computer and Information Science)–at-large member of Council; co-chair, Community Involvement Committee
- Carolyn Marvin–Annenberg School for Communication–at-large member of Council; website and communications liaison
- Ann Mayer–Wharton (Legal Studies & Business Ethics)–at-large member of Council, library liaison
- Marshall W. Meyer–Wharton (Management)–President-Elect
- Jack H. Nagel–Arts & Sciences (Political Science)–chair, Ad Hoc Speakers Bureau
- Ana Lía Obaid–Penn Medicine (Neuroscience)–at-large member of Council; co-chair, Community Involvement Committee
- Martin Pring–Penn Medicine (Physiology)–co-editor of The Hitchhiker’s Guide to Faculty Retirement
- Brian M. Salzberg–Penn Medicine (Neuroscience)–at-large member of Council; Secretary
- Anita A. Summers–Wharton (Business Economics and Public Policy)–Students & Educational Policy representative (SCSEP); Penn Retirement Community Committee representative; chair, Membership Committee
- Former Presidents: Benjamin S. P. Shen, Gerald J. Porter, Neville E. Strumpf, Vivian C. Seltzer, Roger M. A. Allen, Ross A. Webber, Rob Roy MacGregor, Jack H. Nagel, Anita A. Summers, Paul Shaman, Lois K. Evans