

## **The Isbell Scholar Program: A Service Opportunity for Retired UNA Employees**

University employees who are near retirement may submit a request to their immediate supervisor to be designated as an Isbell Scholar. This program allows employees an opportunity to be employed one additional year after retirement for the purpose of establishing an endowment fund to support the mission of the University. Up to one year of additional volunteer service is permissible but it must be requested annually and approved on an annual basis by the department chair or unit head and dean or cost center head. The policies and procedures for accessing this opportunity are outlined below.

Dr. Raymond Isbell first initiated the idea of contributing volunteer service after retirement in lieu of salary in 1997. In 2008, the program of funding scholarships in retirement was formalized and guidelines were developed. In 2011 the program was renamed after Dr Isbell.

### **Procedures**

Per current policy, the employee submits a letter to the president indicating his/her intent to retire. After employee planning to retire receives a letter from the President acknowledging retirement, employee writes a letter to his/her immediate supervisor expressing desire to volunteer services as an Isbell Scholar. Under this program an amount equal to his/her current salary and benefits (minus Social Security withholdings and, optionally, a minimal salary) is used to establish one or more endowment funds within the university. The letter requesting Isbell Scholar status must also provide plans for the endowment funds being created.

The immediate supervisor reviews the request and the plans for the endowment. Endowment plans are intended to enhance scholarship opportunities for UNA students and/or benefit the academic mission of the institution.

For unique endowment plan proposals, additional review may be merited. For faculty proposals, consultation should occur between the chair and the departmental faculty. The chair/supervisor forwards a recommendation to the appropriate dean or cost center head who reviews the proposal. He/she forwards a recommendation to the appropriate Executive Council member. The appropriate Executive Council member forwards a recommendation to the President. If approval is not granted, the Executive Council member must provide an explanation to the President prior to notification of the employee by the Executive Council member.

The President reviews all supporting materials and makes a final decision. If approval is granted, the President instructs the Assistant Vice President for Human Resources (AVPHR) to contact the employee to discuss total amount of potential contribution, TRS allowable earnings, desired salary, and amount(s) to be deposited into the endowment(s). Based on the discussion, the attached form is completed and distributed to the appropriate parties.

The VPAA and Provost (for faculty) or AVPHR (for staff) prepares a letter from President to the employee detailing the salary and conditions for his/her voluntary service.

The Business Office provides to the employee monthly statements showing deposits into the endowment fund(s) and the current balance(s).

The VPAA and Human Resources Offices maintain a plaque of Isbell Scholars on display in Bibb Graves Hall.

## Policies for Isbell Scholars

Since faculty members serving as Isbell Scholars are officially retired and volunteering services, they do not have voting privileges within the department nor do they serve on university committees. They do not participate in activities such as tenure and promotion reviews, curriculum decisions, or other departmental matters that involve voting actions. The workload for Isbell Faculty Scholars is defined in one of two ways, depending on compensation. 1. Faculty Isbell Scholars who choose not to receive any compensation are eligible to serve in a full-time teaching role, including student advisement and office hours as determined in consultation with the academic department chair. 2. Faculty Isbell Scholars who choose to receive compensation may only teach part-time, typically nine hours or the equivalent, or less if they are teaching only graduate courses. They also maintain five office hours a week to accommodate student needs, including advisement, and faculty development. Isbell faculty scholars are credited with 1.5 hours of preparation per credit hour of teaching load. Faculty in category 2 may not exceed an average work week of 29 hours. For a three course teaching load, this includes 9 hours of class time, 5 hours of office hours, and 13.5 hours of preparation or a total of 27.5 hours per week. Teaching assignments and duties rest with the department chair in consultation, as needed with the departmental faculty and/or college dean. Teaching assignments are for the fall and spring semesters only. In rare and unusual cases, requests for exceptions to teach in the summer may be considered but must be approved by the department chair, college dean, and VPAA and Provost. It is strongly recommended that a faculty member desiring Isbell Scholar status meet with the department chair at the beginning of the process to clarify job responsibilities.

Non-faculty requests to serve as an Isbell Scholar will be reviewed and approved by the Executive Council on a case-by-case basis, due to the unique nature of staff positions.

### Official Scholarship Agreement

After all approvals are met, the Isbell Scholar must complete a scholarship agreement with the Office of Advancement which establishes the endowment.

#### *Disclaimer:*

*The information provided for in the above policy and procedure is not and should not be construed as tax advice. UNA recommends that the retiree consult his or her own tax advisor.*

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