

Penn Association of Senior and Emeritus Faculty (PASEF) 2023 Annual Report

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PASEF, the Penn Association of Senior and Emeritus Faculty, is the organization of and for senior (age 55+) and emeritus and retired faculty from all schools and colleges of the University. PASEF encompasses both standing faculty and associated faculty with rank of associate and full professor on the academic clinician, research, and practice tracks. A new preamble to PASEF's mission statement, adopted at the April 19, 2023 Council meeting, states that "the Penn Association of Senior and Emeritus Faculty informs and advocates on matters of concern to senior and retired faculty through dialogue with the University administration and communication with its members and the larger community." In other words: PASEF shares important retirement-related information with its members and engages with the administration when matters of concern to the membership arise. PASEF also does much more—see below. The core mission, however, is service to faculty retirees and faculty approaching retirement and advocacy on their behalf.

PASEF Size and Scope

The size and scope of PASEF needs to be fully appreciated. PASEF's membership is large and largely Philadelphia-based. As of May 31, 2023, PASEF had 2,107 members, including 1,276 senior faculty and 831 retired faculty. Of the retirees, 679 remain in the Philadelphia area. The PASEF Council meets monthly throughout the academic year and attendance at Council meetings is high: average attendance at our nine meetings in 2022-23 was 16.5 or 87 percent. Council members sit ex officio on the Faculty Senate Executive Committee and four of the standing committees of the Faculty Senate: Faculty Development, Diversity, and Equity; Faculty and the Academic Mission; Faculty and the Administration; and Students and Educational Policy. PASEF designates a member of Penn's Committee on Personnel Benefits. And PASEF's president sits on the Executive Council of our sister organization, the Association of Senior and Emeritus Faculty of the Perelman School of Medicine.

PASEF Activities

PASEF's principal activities consist of membership programs, membership engagement and communication, community service, and engagement with the Penn administration.

Membership programs. PASEF offers retirement-related, academic, and cultural programs for its members. This year's retirement-related programs included *Medicare and Social Security* (November 15), *Financial Security: Concerns of Retiring and Retired Faculty* (December 7), *Negotiating the Retirement Transition: What's Next* (February 28), *The Nuts and Bolts of Retirement* (April 12) and, new this year, *Estate Planning for Penn Faculty* (May 10). Our academic programs were Mitchell Orenstein, *Russia's Hybrid War on the West* (September 15), Richard Leventhal, *Archaeology in the 21st Century: Warfare, Communities and Climate* (November 2), Greg Ridgeway, *Scorecards, Benchmarking and the Search for Unusual Hospitals, Communities and Cops* (February 9), and David Issadore, *Diagnosing Disease on a Microchip* (March 22). PASEF also sponsored a three-part Opera Philadelphia lecture series on *Shakespeare and Opera* (*Romeo and Juliet* on October 27, *Othello* on November 3, and *A Midsummer Night's Dream* on November 17). These lectures were delivered by Opera Philadelphia scholar-in-residence Lily Kass in the Amado Recital Hall of Irvine Auditorium.

As in past years, PASEF's retirement-related programs have drawn the largest audiences, around 100 apiece on Zoom. The most popular program this year was *The Nuts and Bolts of Retirement* with 136 Zoom participants. Through May 31, the *Financial Security* program had the greatest number of views—226—of its video posted on the PASEF website. It would not be surprising if the video of the *Estate Planning* program ultimately surpassed this number since it is potentially of interest to many Penn faculty.

It is impossible to recognize all of the people who contributed to the success of PASEF's programs in this short report—a tip of the hat to each of them. Special thanks, however, go PASEF Program Committee chair Andy Binns and members Ed George and Eduardo Glandt, who worked tirelessly to make our programs happen.

Membership engagement and communication. Membership in PASEF is automatic but ongoing engagement of our membership depends on effective communication. Currently, PASEF has three key channels of communication: the Hitchhiker's Guide, PASEF newsletters, and the PASEF website.

PASEF's flagship publication is The Hitchhiker's Guide to Faculty Retirement (<https://provost.upenn.edu/pasef/hitchhikers-guide-faculty-retirement>), now in its 16th edition. Though not an official publication of the University, the Hitchhiker's Guide has become the de facto retirement manual for Penn faculty. We advise PASEF members to print a copy of the Hitchhiker's Guide and keep it with their important papers. Annual updates along with release notes are published each January.

Six PASEF newsletters were sent to members in the 2022-23 academic year. We also sent one news flash and a December holiday card. The newsletter highlights upcoming PASEF and ASEF activities and, in the president's column, alerts members to upcoming deadlines and changes in benefits, benefits administration and other issues affecting retirees. Actual readership of the PASEF newsletter is surprisingly large: on average, 38 percent of PASEF members read our online newsletter.

Our website (<https://provost.upenn.edu/pasef>) is a compendium of current PASEF information as well as past activities—there are links to events as early as 2010. From June 1, 2022 to May 31 2023, there were 5,275 visits to the PASEF website by 3,960 unique users with a total of 11,226 page views. Other than the PASEF home page, the most frequently viewed webpage was the Hitchhiker's Guide.

Martin Pring and Janet Deatrick have ably managed annual revisions of the Hitchhiker's Guide. Thanks to Carolyn Marvin for her light but essential touch in editing the PASEF newsletter. And PASEF coordinator Sarah Barr's superb oversight of the PASEF website is gratefully acknowledged.

Community service. PASEF's community service initiatives include the work of the Community Involvement Committee and the PASEF Speakers Bureau. In 2022-23, the Community Involvement Committee developed two programs for the Walnut West Library on South 40th Street, one on robotics, another on artificial intelligence. Both programs targeted teenagers and their parents and both by all accounts were very well received. Ana Lía Obaid and Mitch Marcus deserve enormous credit for developing and delivering these programs. During 2022-23, ten community-based organizations benefitted from presentations under the auspices of the PASEF Speakers Bureau. Currently, the Speakers Bureau maintains a roster of 22 Penn faculty that includes their topic areas and direct contact information. Thanks go to the faculty who have made themselves available as speakers and, again, to Sarah Barr, who maintains the Speakers Bureau webpage and collates feedback from speakers.

Engagement with the Penn administration. PASEF's steering committee—the president, president-elect, and past president—meet from time to time with the Vice Provost for Faculty, senior staff of the Division of Human Resources, and school-level faculty coordinators to discuss issues of mutual interest and concern. The key agenda items in 2022-23 have been:

Processing of retiree health insurance payments. In response to a PASEF survey conducted last year, Human Resources moved the processing of retiree health insurance payments from Health Equity/WageWorks to BRI Cobra with effect from last October. The transition went smoothly, and we have not heard complaints about the handling of these payments since.

Post-retirement employment for faculty opting for the Faculty Income Allowance Plan (FIAP). From discussions with the Vice Provost for Faculty and the Office of the General Counsel, it was understood that the Internal Revenue Service construes FIAP as severance pay and, as such, generally limits post-retirement employment to 20 percent of pre-retirement effort permanently. We have shared this with the PASEF membership via our newsletter and in the 2023 revision of the Hitchhiker's Guide, where retirees taking FIAP are cautioned not to exceed the 20 percent employment limit.

Library privileges for retired members of the Associated Faculty. We have had ongoing discussions with the Vice Provost for Faculty, the library staff, and others concerning library privileges for retired members of the associated faculty—associate and full professors on the clinical, research, and practice tracks meeting the University's criteria for retirement. These privileges include physical and online access to library resources. There is agreement in principle that library access will be available to retired associated faculty, but certain issues will

require follow-up, including consistent coding of associated faculty in Workday upon retirement and the interface between Workday and the Penn Community system, the latter authorizing library access.

PASEF Council and Committees

A list of 2022-23 PASEF Council and committee members is appended. Thanks to all and especially to Past President Janet Deatruck and President-Elect Janice Bellace for their counsel and support throughout.

In Memoriam–PASEF Council

Vivian Seltzer served as President from 2010-2011 and served as chair of PASEF's Library Committee from 2013-2018.

—*Marshall W. Meyer, 2022-2023 PASEF President*

Appendix: 2022-2023 PASEF Council Members

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)-President Elect, representative to University Council Committee on Personnel Benefits (PBC)

Andrew N. Binns—Arts & Sciences (Biology)-at-large member of Council; Chair, Program Committee

Peter Conn—Arts & Sciences (English)-at-large member of Council

Janet Deatruck—Nursing (Family & Community Health)-Past President, co-editor of *The Hitchhiker's Guide to Faculty Retirement*

Edward I. George—Wharton (Statistics and Data Science)-at-large member of Council

Peter Kuriloff—Graduate School of Education - at-large member of Council; Faculty and the Administration (SCOA) representative

Janice Madden—Arts & Sciences (Regional Science, Sociology, Urban Studies, and Real Estate)-chair, Nominating Committee

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-website and communications liaison

Marshall W. Meyer—Wharton (Management)-President, chair of Steering Committee

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)-Secretary

Former Presidents: Gerald J. Porter, Neville E. Strumpf, Roger M. A. Allen, Ross A. Webber, Jack H. Nagel, Anita A. Summers, Paul Shaman, Lois K. Evans, and Janice F. Madden