

# CUSF Newsletter



## Message from CUSF Chair Virletta Bryant



As chair of CUSF it is my goal to keep USM faculty abreast of important events which impact our work and to create greater opportunities for dialogue. In this issue we will reflect on the accomplishments of the past year, celebrate some of our outstanding faculty, bid best wishes to three CUSF members who are retiring and describe important information about retirement benefits, merit increases and eligibility of adjunct faculty for subsidized medical/prescription benefits. I hope you enjoy this edition.

It has been my sincere honor to serve as the CUSF chair for the past two years. I thank CUSF's Executive Committee for their relentless dedication to service. I could not have asked for a finer team! Please see my personal reflections at the end of the newsletter.

May, 2016

Editor: Joyce Henderson, UMUC

**2015 -2016**

**CUSF Goal 1:  
Improve Visibility & Communications  
With Constituents**

**CUSF Goal 2:  
Strengthen Shared Governance across  
USM Campuses**

**CUSF Goal 3:  
Efficiency & Effectiveness 2.0 Initiative,  
Analytics & Student Success**

**CUSF Goal 4:  
Strengthen Faculty Benefits &  
Compensation**

**CUSF Goal 5:  
Increase Legislative Presence**

**CUSF Executive Committee**

Virletta Bryant, CSU, Chair  
Robert Kaufman, FSU, Vice Chair  
Pat Alt, TU, Secretary  
Joyce Henderson, UMUC, At Large  
Bill Montgomery, UMCP, At Large

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Faculty Affairs**

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**Membership and Rules**

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***Congratulations!***

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**2016 USM Board of Regents' Faculty Awards**

The awards are the highest honor presented by the board to exemplary faculty members. Presented in four categories, the awards honor excellence in teaching, public service, mentoring, innovation, and a combined category of research, scholarship and creative activity. **To see the full bios and information regarding the outstanding accomplishments, see the information here <http://www.usmd.edu/newsroom/news/1605>**

Each award carries a \$1,000 prize provided by the institutions and the University System of Maryland Foundation. Following are the 2016 Regents' Faculty Award recipients, listed by category:



### **Awards for Excellence in Teaching**

Dr. Heather Gable Frostburg State University  
Dr. Jungho Kim University of Maryland, College Park  
Dr. Karen Hopkins University of Maryland, Baltimore  
Dr. Rommel Miranda Towson University

### **Awards for Excellence in Public Service**

Dr. Anne Spence University of Maryland, Baltimore County  
Dr. Debra Stanley University of Baltimore  
Dr. Jane Wolfson Towson University  
Dr. Valli Meeks University of Maryland, Baltimore

### **Awards for Excellence in Mentoring**

Dr. Paulinus Chigbu University of Maryland Eastern Shore  
Dr. Matthew R. Hemm Towson University  
Dr. Russell T. Hill University of Maryland Center for Environmental Science  
Dr. Ivan Sascha Sheehan University of Baltimore

## Award for Excellence in Innovation

Dr. Hoda El-Sayed Bowie State University

## Awards for Excellence in Scholarship, Research, or Creative Activity

Dr. Ramani Duraiswami University of Maryland, College Park  
Dr. Rebecca Adelman University of Maryland, Baltimore County  
Dr. Hany Sobhi Coppin State University  
Dr. Upal Ghosh University of Maryland, Baltimore County



*Contributed by JoAnn Goedert, Associate Vice Chancellor  
University System of Maryland*

## University System of Maryland Retirement Planning and Incentives Plan

In June, 2014, the Board of Regents adopted the University System of Maryland (USM) Retirement Planning and Incentives Plan. This Plan was developed by a USM workgroup comprised of institution and USM Office academic and human resources staff, and representatives from the Office of the Attorney General and the Councils of University System Faculty and Staff. The workgroup's charge was to recommend improvements to policies and practices that would benefit both USM institutions and late-career employees, consistent with exacting Internal Revenue Service (IRS) retirement taxation requirements. The Board-approved Plan provides three options that an institution may offer, at its discretion, in situations where an employee's retirement is beneficial to the institution's business and/or academic objectives. Whether to accept an offer of one of these options is always voluntary with the employee.

**Phased Retirement.** Phased Retirement is an option that allows an employee to reduce duties over a period of one to three years, under an agreement that specifies the duties, level of commitment, and compensation during the transition period, as well as the employee's commitment to retire at the end of that period. In a phased retirement, the employee works part-time, with at least a 25 percent commitment at a pro-rated salary, until the agreed-to retirement date. During this time, the employee remains eligible for health, retirement, and USM benefits, including leave and tuition remission. Phased retirements have proven to be a helpful bridge to retirement for a number of faculty members across USM institutions in recent years.

**Post-Severance Contributions.** A second option, referred to as a post-severance contribution, allows institutions to make tax-deferred contributions to an employee's USM Supplemental 403(b) account upon the employee's retirement. This option is available solely at an institution's discretion and generally offered on a limited, case-by-case basis when it is in an institution's best interest. The IRS post-severance contribution maximum is the lesser of \$53,000 or the employee's annual salary for a period of up to six years. Post-severance contributions provide significant tax advantages, including tax

deferral and a Federal Insurance Contributions Act (FICA) payment exemption to the employee and the institution. Employees must have retiree status to receive a post-severance contribution and cannot receive active employee health benefits or be a paid employee, even part-time, at a State institution or agency during that time. Post-severance contribution recommendations must be approved by an institution's president and be reviewed by legal counsel. Post-severance contributions have been used infrequently in the USM.

**Window Programs:** A "Window" Program is a third option, allowing an institution to offer retirement incentives to a strictly defined group of employees for a limited period of time. Any employee who fits the group's eligibility criteria and agrees to participate within the limited "window" of time can retire with a tax-deferred incentive payment of up to the lesser of the employee's annual salary or \$265,000 for up to two years. In a Window Program, an institution may define an eligible group according to types of employment; employee age; years of service; school, departments, units; a maximum number of employees who may be accepted into the program; or a combination of these criteria. The program must be offered for limited period of time (usually a few months), after which the window "closes" and the program will not be offered again for a number of years.

An institution that intends to establish a Window Program must obtain approval from the Board of Regents. Window Programs are generally offered on a "one-time only" basis, often in situations where it is necessary to downsize a department, school, or program, or otherwise reduce the number of employees. To date, the USM has never implemented a Window Program. Whenever an institution proposes any of these retirement incentive options and the employee agrees to accept it, a written agreement must be completed. That agreement must include the specific terms of the option that will be provided to the employee, including compensation amounts, any continuing service commitment and benefits, the duration of the agreement, and the employee's commitment to retire as of a date certain.

Please note that this information is just a summary of the general features of the USM's retirement incentive options. These options are also governed by complex IRS requirements and restrictions. The full USM Retirement Planning and Incentives Plan can be found at <http://www.usmd.edu/usm/adminfinance/HumResFF.html>.

## **Health Benefits Eligibility for USM Adjunct Faculty Affordable Care Act Eligibility Guidelines**

Contributed by JoAnn Goedert, Associate Vice Chancellor, University System of Maryland



**The Affordable Care Act (ACA) mandates that nearly all U.S. employees who work full time—defined by the ACA as an average of 30 hours a week or 130 hours per month— are eligible for health benefits. Adjunct faculty are included within the ACA’s scope, and the USM is committed to ensuring that all eligible adjunct faculty are invited to participate in the state employees’ health benefits program.**

The first big challenge in meeting this commitment was to establish standards to determine when an adjunct faculty member is employed full-time for ACA purposes. The USM looks to workload expectations for full-time non-tenure track teaching (FTNTT) faculty as the basis for its ACA standard for adjunct faculty. It was agreed that the average USM FTNTT teaching load is the equivalent of four three-credit courses per term. Given that ACA eligibility is based on a 30-hour work week, **the USM determined that adjunct faculty would be eligible for health benefits if they taught 75 percent of the FTNTT teaching load, or nine credits per term—the equivalent of three three-credit courses per term.**

Under rules established by the Internal Revenue Service (IRS), an institution can meet its obligations to adjunct faculty if it credits 2.25 work hours for every credit hour of teaching. Under this IRS “safe harbor” minimum, an adjunct faculty member would have to teach more than 13 credit hours per term (e.g.,  $13 \times 2.25 = 29.25$  hours) in order to qualify for health benefits. **Under the USM standard, adjunct faculty are eligible at just nine credit hours per term.** That is because the USM standard recognizes the significant time that adjunct faculty invest outside hours spent teaching in the classroom.

The USM standard also allows for institutional flexibility where three-credit courses and semester-based terms are not the norm. With the FTNTT teaching load as its base, the standard should enable institutions to easily determine whether the 75 percent teaching load required for adjunct eligibility is being met in those non-typical situations.

The ACA eligibility rules have additional complexity, allowing for eligibility to be determined on two different time scales. If a faculty member is teaching three three-credit courses for a full term that exceeds 90 days, s/he is immediately eligible for health benefits. However, ACA rules also allow for review of a faculty member’s work over an extended “**measuring period**” to determine future health benefits eligibility. **For USM employees, that measuring period runs from October 16 to October 1 each year.** A faculty member who works an average of 30 hours per week during that period (not counting summer breaks) will thus be eligible for health benefits while teaching for an institution in the following calendar year.

Yet another factor to keep in mind is that, for ACA purposes, the State of Maryland is the “employer.” Thus, for an adjunct faculty member who works at more than one state institution or agency, health benefits eligibility is determined by aggregating hours across institutions and agencies. **If an adjunct faculty member teaches at more than one USM or other state institution, s/he should alert the institution, so that proper credit is given in the determination of health benefits eligibility.**

If you have questions regarding adjunct faculty health benefits eligibility, please contact your institution’s Human Resources Office to be sure that you are offered the maximum health benefits available to you under the ACA and the state health benefits program.



## Recently Announced – Merit Increases!

*The following are excerpts taken from memo sent to USM Presidents from Robert L. Caret, Chancellor April 25, 2016*

The General Assembly has approved merit increase funding for FY 2017, with an implementation date of July 1, 2016. FY 2017 merit increases will be based on the employee's past performance during an evaluation period ending no later than the end of FY 2016. Employees who consistently meet the standards of performance for their positions shall qualify for a merit increase. Each institution will be responsible for developing and administering the performance evaluation process upon which the merit increases will be based and to notify employees of resulting increases.



## New Adventures to Come!

**CUSF Member**  
**Jeanne Geiger-Brown University of Maryland Baltimore**



Dr. Jeanne Geiger-Brown has just retired from the UMB School of Nursing and is beginning the start of a new adventure as the founding dean of the School of Health Professions at Stevenson University in Baltimore County. Dr. Geiger-Brown has been a UMSON faculty member for 14 years, and a doctoral student for 5 years before that. During her time at UMSON she taught in the undergraduate, masters and PhD programs, and served on numerous school, university and System of Maryland committees. She chaired 6 PhD dissertation committees, and served on 8 others. She is best known for her work in the area of sleep science, including the role of nurses' sleep for preventing accidents, injuries, and errors. Dr. Geiger-Brown was inducted as Fellow in the American Academy of Nursing in 2012.

In an interview with Jeanne, she reflected on her time serving on CUSF and her the faculty senate. She shared that she had enjoyed the time on each because both experiences helped her to translate the needs of the faculty to the administration and also helped to translate the administration's decisions to faculty. Through CUSF she also gained confidence for her new position as dean. She enjoyed being at the

table with other faculty from the University System of Maryland, visiting the campuses and hearing first hand from the respective Presidents and other key individuals at the campus about their goals, challenges and insight specific to their students, faculty and community. Jeanne stated that's she has learned that sometimes decisions seem as though they are personal, but they are not at all – they are what is right for the university (and sometimes from lack of knowledge). She gained respect and knowledge through each individual visit to a campus – at Frostburg, for example, she delighted in learning of the robust environmental work being done.

Jeanne also shared that she will of course remember her outstanding students particularly so in the PH.D. programs where she had the privilege of watching eager students come to the program and after their course of study, leave as scholars, learners and professionals holding the highest ideals of nursing. She stated that students will surprise you and excel beyond your expectations if you create the right environment for them to do so. What a great note to end on. Best of wishes new dean Geiger-Brown. CUSF will miss you!



**CUSF Member**

**William "Bill" Montgomery, University of Maryland College Park**

An additional member of CUSF, Dr. William Montgomery, is also retiring from his position of professor of flute, chamber music, and wind pedagogy. Bill was the 2007-2008 Chair of the University Senate, served as Director of Graduate Studies in Music, Chairman of the Summer Senior Scholars Program, and Chairman of the Wind & Percussion Division. His unique genre-oriented Flute Master Class has been presented at the University of Maryland every summer for over 30 years.

Dr. Montgomery has been the Producer of the weekly Friday Concert Series at the Arts Club of Washington where he has presented over 500 concerts to date. He has also served for many years as a Trustee of the Endowment at the Arts Club. He is a Past President of the National Flute Association and was the Program Chairman for the NFA Conventions in Atlanta and Denver, a member of the Board of Directors of the Marcel Moyse Society, a Past

President of the Flute Society of Washington and has been a contributor to many notable publications and organizations.

In a recent CUSF executive committee meeting, on which Bill serves, he shared that he looks forward to returning to playing his flute, most particularly chamber music and doing so with others. Also stepping aside from some of his responsibilities at The Arts Club of Washington, he plans to continue to promote the Club, enjoy the performances and other events there as he contributes to work toward bringing more into the city of Washington DC and the Club for performances. Bill also look forward to finding new ways to reach the public so that lives can be enriched even further through beautiful music, performed well.



**CUSF Member**

**William "Bill" Montgomery, University of Maryland College Park**

Our third CUSF retiree, Anthropology Professor, William Taft Stuart, has decided that the time has come to retire from the Department of Anthropology. Professor Stuart has been active in teaching and applying anthropology for some 50 years and has become a noteworthy advocate for a multi-paradigmatic approach to the study of culture. An expert in the areas of comparative religion and the study of new religious movements, human behavioral ecology, and the history and philosophy of social science ideas, Professor Stuart always encouraged his

students to explore both the scientific and humanistic aspects of anthropology because both are essential to understanding and explanation. Throughout his career, Professor Stuart was a strong advocate for the development of talented students and was the principal architect for the NGO known as the Center for



Excellence in Education while working for Admiral H.G. Rickover. We wish Professor Stuart the very best in retirement, which officially begins on June 1, 2016.



## Reflections from CUSF Chair 2014-2016

### Virletta Bryant

As I reflect over the course of the year and my tenure as CUSF Chair, I am thoroughly amazed with the progress CUSF has been able to achieve during the 2015/2016 academic year. Collectively we committed to furthering five goals with the first being to **Improve Visibility and Communication with Constituents**. This year we focused on reviving the Newsletter that has not circulated in over five years. In its inaugural year we hope you have enjoyed reading about academic freedom, collective bargaining and faculty benefits and compensation.

Speaking of **Faculty Benefits and Compensation**, this too is one of CUSF's goals. We hope as you digest this edition you will stay informed about retirement options as well as learn of the impact the Affordable Care Act is having on USM adjunct's eligibility for health care benefits. While this year saw no merit pay increase, I am pleased to announce as of July 1, 2016 a 2.5% merit pay increase has been approved for the 2016/2017 year!

Another CUSF goal is the **Efficiency and Effectiveness (E&E) 2.0 goal**. This goal derived from the Board of Regent's initiative to increase E&E in measurable ways. CUSF felt it important that faculty be a part of the process to ensure academic quality was not sacrificed at the expense of efficiencies. Also, it was critical that CUSF review and provide feedback as necessary to system-wide initiatives that would directly impact faculty. To date we have formed a taskforce to monitor the developments and to report to CUSF on an as

needed bases. We've also surveyed the campuses to determine the activities that are occurring at each institution and to assess the level of faculty involvement. Most recently we have named CUSF representative Dr. Nagaraj Neerchal (UMBC) to serve on USM's E&E 2.0 workgroup. He will continue to ensure the interests of faculty are adequately represented.

CUSF places great importance on its goal of **Strengthening Shared Governance Across USM Campuses**. A multipronged approach was implemented to continuously address shared governance across USM campuses. Last month CUSF hosted its Biannual Faculty Senate Chairs meeting. At this time USM Senate Chairs are able to examine shared governance from a broad perspective and hear the strategies campuses are using to improve governance. Based on the feedback, participants have found it to be invaluable and have requested that CUSF expand the number of times throughout the course of the year that USM campus faculty leaders meet. In addition to the Faculty Senate Chair's meetings for the last four years, CUSF has conducted shared governance climate surveys on each campus and will do so again this year. These reports are aggregated and submitted to the Chancellor. For those interested in participating please see your faculty senate chair. This year CUSF has started a repository of best practices on shared governance. Resources are available to campuses that can easily be tailored to conform to the unique challenges and strengths each campus brings to the governance process.

CUSF also worked very hard to **Increase its Legislative Presence** this year. In February CUSF joined forces with the Council of University System Staff, University System of Maryland Student Council and the University System of Maryland Foundation Board to host USM Annapolis Day. By all accounts it was a successful event. USM was recognized on the floor of the House and Senate of the General Assembly of Maryland. Additionally, CUSF representatives split into small groups and met with over 85% of legislators serving on committees which are salient to higher education. These introductory meetings gave CUSF a chance to develop its legislative relations and to also advocate on behalf of faculty. As a result of our initial outreach efforts, CUSF was immediately asked to testify on key legislation such as the University of Maryland Strategic Partnership Act of 2016. As a result of our engagement legislators had a fuller appreciation of how the bill could potentially impact faculty at the named institutions as well as system-wide. Our legislative activities significantly contributed to critical amendments to the bill.

While we celebrate having a productive year we are fully aware that our work as faculty is never complete. As my tenure as CUSF Chair comes to an end I encourage us to remember that as faculty it is imperative that we "accept their (our) share of faculty responsibilities for the governance of their (our) institution. If they (we) do not, authority will drift away from them (us), since someone must exercise it, and if members of the faculty do not, others will (AAUP, 1994).

In Service,  
Virletta Bryant, Ph.D., LICSW  
CUSF Chair 2014-2016

CUSF Photos from 2015-2016 Academic Year





More CUSF News to Follow in 2016-2017  
Enjoy Your Summer!