

COMMITTEE ON EMERITI RELATIONS
Report on the Dickson Emeriti Professorship Award on the UCSC Campus

To: Academic Senate, Santa Cruz Division

The Edward A. Dickson Emeriti Professorship is an endowed award distributed to the ten UC campuses under the authority of the EVC of each campus to recognize the teaching, service, and research of emeriti. Systemwide, the handling of the Dickson award varies. Several campuses have made it an administrative decision; several have given the responsibility to their respective Emeriti Associations; at several it is handled by Senate Committees. At UCSC, the award has rotated through the divisions and has been used by the Deans to recall the awardee to teach. This process was suggested originally by the Committee on Emeriti Relations (CER), and put into practice by the EVC.

At the request of CP/EVC Alison Galloway, the CER met with her on October 12, 2015 to discuss the Dickson Emeriti Professorship. CP/EVC Galloway noted that the award has not been highly utilized in recent years and CER agreed with the need to rethink the criteria and guidelines of the award to broaden the use and more accurately reflect the original gift document.

In this consultation, CP/EVC Galloway requested that CER manage the Dickson Award. In a post consultation (10/29/15) to the CP/EVC, CER accepted the invitation and noted that CER will formulate a new process and guidelines for the award at a November committee meeting.

There is precedent among Senate committees for this type of activity in the work of the Committee on Research adjudicating grants and the Committee on Teaching in designing and adjudicating the Excellence in Teaching Awards. Systemwide, there is precedent in the three other UC campuses that have Senate emeriti committees (UC Berkeley, UC Los Angeles, and UC Davis). At two of these campuses the award is managed by the emeriti Academic Senate committees. Also, CER assuming responsibility for the handling of the award is in accordance with the UCSC Senate Manual and the gift document (see Appendix A), which states that the Edward A. Dickson Emeriti Professorship is appointment by the President. Senate Manual Chapter 13.2 states that Academic Senate committees:

“may make recommendations and render service to the President, the Chancellor, other administrative officers, and individual members of the Division, reporting their recommendations to the Division when such reporting is consistent with the original charge to the committee and is in the best interest of the University”.

CER has agreed to the EVC’s request that it manage the annual award and that it will recommend a recipient to the CP/EVC who will then nominate that person to the President.

CER would like to see the award have a general call, unrestricted by division or discipline, with nominations and/or applications, the specific guidelines for which are to be determined. CER has expressed an interest in having the awardee make public in some way (a lecture, a public performance, or conference) their activities supported by the award, such that the broader campus may benefit.

As for detailed criteria, CER will meet in November to consider options, draft guidelines, consider how the selection committee will be constituted, and plan how the award will be publicized and awarded.

Award Background

In 1955, Edward A. Dickson presented the University with a gift endowment made in trust, with one half to support and maintain special annual professorships to be awarded to retired faculty members. The award for emeriti is described in the gift document as follows:

The income becoming available to the Regents shall be used for these University purposes, the order thereof being my preference:

a. For the support and maintenance of special annual Professorships in the University of California to which shall be appointed by the President, with approval of the Regents, persons of academic rank who have been retired after service in the University of California and who shall receive such awards in addition to their retirement or pension allowances. Awards shall be made upon such conditions of service, research or teaching as The Regents may require. Professorships so awarded shall be known as the Edward A. Dickson Emeriti Professorships.

In 2003, the Office of the President (UCOP) transferred the Dickson Endowment to the ten UC campuses, and provided authority to the EVCs (see Appendix A) on each campus to determine how the fund would be used. The then-climate on campus was one of a tight budget and a quickly increasing student body. Following consultation with the Committee on Emeriti Relations (CER), an award process was created by which the Dickson Award would be rotated between the divisions and would be to designate and to compensate a distinguished emeritus/a professor recalled for teaching.

CER looks forward to stewarding a new life for the Dickson Professorship on the UCSC campus to bring the award back to the intended goals of the endowment.

Respectfully submitted;
COMMITTEE ON EMERITI RELATIONS
Barry Bowman
Linda Burman-Hall
James Zachos, *ex officio*
Shelly Errington, *Chair*

October 30, 2015

APPENDIX A

UNIVERSITY OF CALIFORNIA

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OFFICE OF THE PROVOST AND SENIOR VICE PRESIDENT—
ACADEMIC AFFAIRS

OFFICE OF THE PRESIDENT
1111 FRANKLIN STREET, 13TH FLOOR
OAKLAND, CALIFORNIA 94612-5200

June 24, 2003

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Chancellor's Immediate Office
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CHANCELLORS

RE: Edward A. Dickson Emeriti Professorship Reallocation

Dear Colleagues:

This letter documents the reallocation of the Edward A. Dickson Emeriti Professorship Endowment into ten campus-specific endowment funds and provides a fund history for your campus files.

Edward A. Dickson served as a Regent of the University from 1913 to 1946, the longest tenure of any Regent. His vision is credited with helping to make the Los Angeles campus a reality.

In 1955, Mr. Dickson presented the University with a gift endowment (Fund 05304), made in trust, one half to support non-charitable beneficiaries, one of whom is still living, the balance and charitable remainder to support and maintain special annual professorships to be awarded to retired faculty members.

The award for retired faculty members is described in the gift document as follows:

(4) The income becoming available to The Regents shall be used for these University purposes, the order thereof being my preference:

- (a) For the support and maintenance of special annual Professorships in the University of California to which shall be appointed by the President, with approval of The Regents, persons of academic rank who have been retired after service in the University of California and who shall receive such awards in addition to their retirement or pension allowances. Awards shall be made upon such conditions of service, research or teaching as The Regents may require. Professorships so awarded shall be known as the Edward A. Dickson Emeriti Professorships.*

Reviews of the Dickson Emeriti Professorship Endowment in the 1970s and in 1993 showed that the payout from the fund had fallen into consistent disuse at all campuses. In 1993, The Regents

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approved the establishment of a second fund, the Dickson Endowment II (Fund 05328), which called back the accumulated payout from the original Endowment (I) to capitalize Endowment II.

The University's fifty percent (50%) share of the income from Endowment I was then folded into the payout from Endowment II and distributed to nine campuses annually and equally. Under the 1993 reinstatement of the fund, the President's authority for approval of the Dickson Emeriti Professorships was delegated to the Chancellors.

A current review of the Dickson Emeriti Professorships by the Offices of Academic Affairs and University Affairs discovered that the funds have again fallen into disuse. These offices recommend that the fund principal be divided into ten separate endowments, one dedicated to each campus, to simplify the administration of the award at each campus. The endowment payout must continue to be used as specified by Mr. Dickson, which may include support for an annual award for one or more emeritus professor, and/or annual support for teaching, research, public service, and/or salary stipend of emeriti professors on recall. Each emeritus professor receiving support from the Dickson Endowment shall be known as the Edward A. Dickson Emeriti Professor.

The May 31, 2003 market values for the funds were \$2,200,174 for Endowment I (05304) and \$819,538 for Endowment II (05328). The average total accumulation of payout at each of the campuses is approximately \$40,000.

This reallocation requires Corporate Accounting in the Office of the President to recall from the campuses the June 30, 2003 balance of accumulated payout related to the Dickson Endowment in order that these funds may be added to the principal of Endowment II, which will then be divided equally to establish ten endowments, one dedicated to each campus. The related endowment payout to be transferred to the campuses in August 2003 for expenditure in 2003-04 will be approximately \$10,000. On the death of the one remaining non-charitable beneficiary of Endowment I, the principal of that fund will also be divided in ten equal parts to be added to the individual campus Edward A. Dickson Emeriti Professorship endowment funds.

Allocation among the campuses of dedicated Dickson Emeriti Professorship endowments will aid the campuses in their administration of these important awards. ~~The administration of the funds will be reviewed again in 2008.~~

Accordingly, I reallocate the Edward A. Dickson Emeriti Professorship Endowment as ten separate endowments, one dedicated to each campus, the payout to be spent according to the donor's terms stated above in italics at the direction of the Executive Vice Chancellor or the chief academic officer.

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The new fund numbers for the Edward A. Dickson Emeriti Professorship Endowments are:

Berkeley	05251-25321	Riverside	05255-25325
Davis	05253-25323	San Diego	05256-25326
Irvine	05259-25329	San Francisco	05252-25322
Los Angeles	05254-25324	Santa Barbara	05258-25328
Merced	05249-2532M	Santa Cruz	05257-25327

In addition, I enclose a paper on the Principles of Endowment Administration, which is a valuable reference for all staff members involved in endowment administration.

Sincerely,



C. Judson King
Provost and Senior Vice President-
Academic Affairs

Enclosure

cc Senior Vice President Darling
Assistant Vice President Switkes
Chief Academic Officers
Advancement Services Directors
Senior Paralegal Adams
Endowment Stewards
Manager Kendall
Director Smith
Endowment Steward Hitzeman
