




Executive Memorandum 24-010

February 22, 2024

From: Stephen Perez, President 
Subject: Procedure for Administrator Employees' Option to Retreat

Upon the recommendation of the Academic Senate and the concurrence of the Provost, I approve the Procedure for Administrator Employees' Option to Retreat, effective immediately.

Policy Title:	EM 24-010 Procedure for Administrator Employees' Option to Retreat
Contact:	Office of the Provost; Faculty Affairs and Success
Supersedes:	
Revision:	
Enabling Legislation or Executive Order:	

Procedure for Administrator Employees' Option to Retreat

The California State University's [policy](#), Employment Policy Governing Administrator Employees' Option to Retreat, effective November 16, 2022, governs the option for administrators to retreat to a faculty position at the end of an administrative appointment and sets forth "the conditions under which Administrators are eligible and ineligible to Retreat." ("Employment Policy")

Purpose

The purpose of this executive memorandum is to set forth the procedures governing option to Retreat for Administrators under the Higher Education Employer-Employee Relations Act and Title V, under either Management Personnel Plan (M80) or Executive (M98) ("Administrator"), requesting option to Retreat to a faculty position at California State University, Chico as part of their appointment as an Administrator.

An option to Retreat ("Retreat") is granted at the time of the appointment and must be memorialized in the Administrator candidate's appointment letter.

For Administrator appointments that include the option to Retreat, the procedures below must first be followed before a final offer is made to the candidate.

**Process/Considerations for the Granting of an Option to Retreat
to an Administrator Finalist Candidate**

1. If an Administrator candidate being considered as the finalist for a position has requested an option to Retreat as part of their candidacy consideration, Chico State Human Resources must promptly notify the Provost, who will notify the appropriate administrator to which the Retreat pertains. The appropriate administrator will notify the department chair of the department/program to which the candidate wishes to Retreat.
2. Administrator candidates who have earned and held a tenured faculty position are ordinarily granted the option to Retreat to a tenured faculty position. The option to Retreat is not ordinarily granted to non-academics or candidates who have not earned and held a tenured or tenure-track faculty position. While the option to Retreat is not ordinarily granted to non-academics or candidates who have not earned and held a tenured or tenure-track faculty position, the option to Retreat to a probationary or tenured position may be granted on a case-by-case basis to such candidates, “provided they demonstrate a substantial record of achievement meriting such rank and receive the recommendation of the faculty committee and approval of the campus President or chancellor”. (Employment Policy)
3. Following the procedures outlined in the Employment Policy, the hiring authority or search committee chair must collaborate with the department chair of the department/program to which the candidate wishes to Retreat so that all the department’s/program’s tenured faculty may evaluate the candidate’s qualifications and make a recommendation on the Retreat. If there are fewer than three tenured faculty members in the department/program, up to three tenured faculty from related disciplines shall be selected to serve in the evaluation.
5. With an understanding that candidates with long records of administrative experience may have different teaching and research priorities than they otherwise would have, the evaluation should include a review of the candidate’s CV to assess the candidate’s “education, background, excellence in teaching, scholarship, and/or research and creative activities, and professionalism” and “any obtainment of tenure at a prior institution”. (Employment Policy)
6. In a timely manner respecting the needs of the hiring process, the department chair, on behalf of the tenured faculty, must provide a summary of the process of evaluation and the department’s/program’s recommendation to the appropriate administrator, Provost, and Vice Provost for Faculty Affairs and Success.
7. The Provost’s Office will notify Human Resources if an option to Retreat is approved for a candidate. The hiring authority will ensure that if the Retreat is conferred, the details of the Retreat must be documented in the Administrator’s appointment letter if they are selected for the position. Human Resources will provide a copy of the administrator’s appointment letter with Retreat information to Faculty Affairs and Success for their records.

Memorialization of the Terms of Retreat

If the Administrator candidate is conferred a Retreat and is selected for the administrator position, the following terms regarding the Retreat must be included in the official appointment letter:

1. Acknowledgment of the faculty appointment and whether it is with or without tenure;
2. Name of the department/program and college of the faculty appointment if the Retreat is exercised;
3. Faculty rank upon Retreat;
4. Salary placement details to be applied upon Retreat: If the Retreat is exercised three years or more after the effective date of the appointment, the salary may be set up to the maximum pay rate for their rank, at the President's discretion. If the Retreat is exercised prior to serving three years in the administrator role, "the salary at the time of Retreat must be in line with similarly ranked professors in the department/school to which they are Retreating;"
5. Terms of administrative sabbatical (if provided) or paid time granted upon Retreat to prepare for a return to teaching;
6. The amount of time required for notice by the Administrator before they exercise their intent to Retreat, keeping in mind the timing of semesters;
7. Any additional terms agreed on between the Administrator candidate and the campus relating to the Retreat and/or the faculty appointment; and
8. Notice of the candidate's potential ineligibility for the option to Retreat in the event of a finding or the Administrator's retirement benefits have been rescinded due to criminal misconduct as defined and set forth in the Employment Policy.

Current Tenured/Tenure-Track Chico State Faculty Who Accept an Administrator Position

For current tenured/tenure-track Chico State faculty who are offered an Administrator position, the following steps apply.

1. If the candidate has already received tenure in their home department/program and the option is to Retreat back to the same tenured rank, the department's/program's tenured faculty do not need to evaluate the candidate's qualifications to Retreat to the same tenured faculty rank and position.
2. If the candidate has already received tenure in their home department/program and the option is to Retreat back to a higher tenured rank, the department's/program's tenured faculty must evaluate the candidate's qualifications to Retreat to a higher tenured rank and provide a recommendation as described in the process above.
3. If the candidate is tenure-track in their home department/program and the option is to Retreat back to a tenure-track position at the same rank, the department's/program's tenured faculty do not need to evaluate the candidate's qualifications to Retreat to a tenure-track position.

4. If the candidate is tenure-track and the option is to Retreat back to a tenured faculty position or a tenure-track position at a higher rank, the department's/program's tenured faculty must evaluate the candidate's qualifications to Retreat to a tenured position or a tenure-track position at a higher rank and provide a recommendation as described in the process above.
5. The appointment letter must document the Retreat, the amount of notice time required by the department/program before the Retreat is exercised, and what the rank, evaluation cycle status, salary, and other related terms are, based on the period of time the Retreat is exercised.
6. The appointment letter must also provide notice of the faculty member's potential ineligibility for the Retreat in the event of a finding or the Administrator's retirement benefits have been rescinded due to criminal misconduct as defined in the Employment Policy.