Date: October 7, 2013 (revised November 12, 2013)
From: Wendy Crone, Associate Dean for Graduate Education, Graduate School
       Steve Hahn, Assistant Dean, Office of Admissions and Academic Services, Graduate School
RE: Upon the Unexpected Death of a Faculty Colleague

To Whom It May Concern,

Unfortunately there are occasions when we must face the unexpected death of a faculty colleague. In contrast to a planned departure or retirement, the sudden death of a faculty member can create a number of issues for students, colleagues, and staff to deal with beyond the grief experienced by those who knew the individual. The Graduate School is frequently involved in these cases because of the unique relationship between a graduate student and their faculty advisor. Having had the unfortunate opportunity to interact with departments and programs around campus that have been faced with a sudden loss, we felt that it would be helpful to provide some guidance to those who are faced with this situation in the future.

Below you will find suggestions for steps to take and individuals/units to contact if you are faced with the unexpected death of a colleague. Often these issues fall to the department chair, director of graduate studies, and staff within each of the units and programs where the faculty member held their tenure home, taught, and advised graduate students.

Some of these suggestions are more intuitive, others are the benefit of recent experience, and they are offered here in no particular order or chronology. The intent is to have a list of possible actions to consider so that this may be of ready reference during a trying time for all those involved.

If you have additional suggestions or changes based on your experience, we would welcome your input. Please feel free to contact Wendy Crone at wcrone@wisc.edu or 608-262-2433.

PROGRAM GUIDANCE

- Identify the individuals who will take part in conducting the steps below and divide duties accordingly.
- Send condolences to the family and inquire about visitation and funeral arrangements and how broadly they would like this information to be broadcast.
- Direct family to departmental HR person for payroll disposition, life insurance, sick leave conversion, other disposition of benefits.
- Notify the Provost’s Office, Graduate School, and college Dean’s Office.
- Notify school/college communications office and/or University Communications.
- Send notice to faculty, staff and students of the program. Follow up with visitation and funeral information as appropriate. Advise all of know funeral preferences/religious customs if known.
- Reach out to undergraduate, graduate and professional students who interacted with the faculty member immediately with messages of condolence.
Ensure that graduate students are included in all memorial events open to colleagues, for they (like the faculty) have lost a colleague and possibly a friend. At an appropriate time, meet with graduate students to assure them of their options regarding advising and funding.

Consider a memorial resolution from the Faculty Senate.

Make family and staff aware of appropriate contacts at the UW Foundation and the Alumni Association should they wish to commemorate the faculty member.

Send notice to former students, professional organizations, and other departments nationally as needed. Consider LinkedIn or other social media groups if accessible.

Contact DoIT to set up an email auto reply on the individual’s account with notification and information about the appropriate program staff or faculty member to contact with questions.
  - Arrange for disposition of the faculty member’s university email account. As a university resource, it may or may not be appropriate to grant this access to the family members, or at least to do so right away.
  - The department chair should assign someone to look through the mail archive and preserve pending correspondence, letters of recommendation, etc. where graduate students are concerned. (This may be too difficult for a family member to do for quite some time.)
  - Remove the faculty member from relevant email lists and other systems both on and off campus.

Forward office phone to department office.

Update the department/program web sites with a notification and direction on how to make inquiries.

Reassign immediate teaching/advising duties. The program should contact Curricular Services at the Registrar’s Office to change grading permissions for courses in progress (classes as well as X90 and X99 courses).

Identify any official roles the faculty member was fulfilling on campus (such as Director of Graduate Studies or an elected member of a campus committee). Work with program faculty or other appointing body to identify an interim appointment for those roles until a permanent replacement can be named.

Remain sensitive to grieving students and be flexible with deadlines where this is needed. Refer students to the Division of Student Life and/or University Health Services where they may talk with a counselor.

Secure the faculty member’s office to make sure student files, recommendation letters, thesis comments, etc. remain available for students (either in electronic form or hard copy). Make arrangements to send:
  - Personal items to family
  - Books/reprints to family and/or faculty colleagues
  - Lab equipment to colleagues or swap

Consider offering to graduate students the opportunity to request a letter of recommendation from the department chair or director of graduate studies in place of one from their faculty advisor. Others have provided a previous letter or excerpt from a previous letter with a cover letter of explanation regarding the circumstances.

Research data should be examined to determine who needs access to it in order to complete research and/or write papers. The requirements for longer term retention and disposal should be investigated.

If appropriate, contact funding agencies and notify them of change in PI on active grants.
  - The department/center administering grants on which the faculty member is named as Principal Investigator or Key Personnel should prepare a list of affected grants for planning purposes.
  - Each grant on which s/he served as PI must be relinquished or transferred to a qualified
alternate PI according to the sponsoring agency's policies.
- For each grant on which s/he was identified as non-PI Key Personnel in the award
document, the sponsoring agency must be informed of the death, and in most cases
should be asked to approve of alternative plans to ensure continuation of the research or
other funded activities.
- The school/college research office and post-award staff from the Office of Research and
Sponsored Programs are available to consult and advise on specific steps needed for each
grant.

**GRADUATE SCHOOL GUIDANCE**

- Upon notification, the assistant dean for admissions and academic services will work with
program(s) and use ISIS and other resources to establish a list of current advisees, including their
contact information, funding and time left to degree.
- The associate dean for graduate education and/or divisional associate dean will contact each
student individually to express condolences, offer contact information on counseling resources,
and assure them that they will be included in any future planning on their behalf.
- Associate/assistant dean will contact the graduate program to make sure their responsibilities are
covered (above) and to assure them we will be flexible regarding deadlines, composition of PhD
committees, etc.
- At the request of the program, the Graduate School will consider extracurricular funding requests
so that previously funded students are not disadvantaged.
- At the appropriate time, associate dean(s) of the Graduate School will meet with the advisees as a
group to make sure all is going as well as it can.
- The assistant dean will remove the faculty member’s email address from all GS lists and systems
such as our Major Areas of Study.
- Graduate School research administration staff will assist the program as needed in assigning
active projects to alternate PIs.
- Throughout, the staff of the Graduate School will remain sensitive to grieving students and offer
flexibility where this is needed. We will be observant of any opportunity to refer students to the
Division of Student Life or University Health Services, where they may talk with a counselor.