

San Francisco State University

PRERETIREMENT REDUCTION IN TIME BASE FACULTY EARLY RETIREMENT PROGRAM SUMMARIES

	PRE-RETIREMENT REDUCTION IN TIME BASE PROGRAM (PRTBP)	FACULTY EARLY RETIREMENT PROGRAM (FERP)
Nature of the Program	A faculty unit employee is <u>not retired</u> , but is entitled to work less than full time. Participants retain the same rank and status as they had prior to participation.	A faculty employee is <u>retired</u> , but may work one semester or an average percentage for Academic Year, at the same salary range and step held prior to retirement.
Entitlement to Participate	Participation is at the discretion of the president.	Tenured faculty employees and tenured librarians may participate. (29.1-29.2)
Eligibility	<ul style="list-style-type: none">a) tenured faculty unit employees and librarians: some Unit 4 employees;b) 10 years full-time service;c) full-time during the five years immediately preceding the effective date of PRTBP;d) sabbatical leave counts towards five year requirement;e) age 55-64 (CalPERS) or age 55-63 years (CalSTRS). (30.3)	<ul style="list-style-type: none">a) tenured academic teaching employee or tenured librarian;b) be age 55;c) eligible for service retirement (age 55 and 5 years of service);d) granted service retirement;e) shall be entitled for no more than 5 years, only those who elect to participate after 7/1/95. Note: Application must be made prior to retirement. Employees who were in the Designated Market Condition Salaries shall be <u>eligible</u> to participate in FERP. [Participants who entered FERP prior to 7/1/87, see article 29.13.] (29.1-29.4)
Assignment	The time base of a participant shall be reduced to the requested two-thirds (2/3), one-half (1/2), or one-third (1/3) for the academic year or fiscal year. (30.5)	One (1) academic term not to exceed a total of ninety (90) days (1 semester) or fifty (50) percent of the employee's timebase in the year preceding retirement. Participants may request further reduction in timebase; however, the reduction shall continue for duration of FERP appointment. (29.7)
Duties	A participant shall be required to perform normal responsibilities, duties, and activities pro rata. (30.13)	A participant shall be required to perform normal responsibilities and his/her share of normal duties and activities. (29.17)

PRE-RETIREMENT REDUCTION IN TIME BASE PROGRAM (PRTBP)

FACULTY EARLY RETIREMENT PROGRAM (FERP)

Limitations

1. The particular assignment and the semester(s) of the assignment are at the discretion of the department chair & school dean. (e.g., a half time faculty member could teach full-time for one semester, or 1/2 time for two semesters, according to the needs of the school and department.)

1. The semester and the particular assignment shall be by mutual agreement. If mutual agreement is not reached, the university may alter the period of employment. The university shall provide a 120-day notice of an altered period. (29.3)

If a participant fails to meet the employment commitment, salary adjustment or repayment of an overpayment may be required. (30.12)

2. Participation in FERP shall commence at the beginning of the campus academic year. (29.5)

2. Participation is limited to 5 years maximum. A participant is expected to retiree at the end of this period of participation. (30.2)

3. Participant may be appointed in university extension (consistent with the CSU Additional Employment policy) during the semester under FERP. Other additional employment is NOT allowed. (29.12)

3. The fraction of time originally requested and authorized may not be changed without the consent of the President or the designee. (30.11)

4. Length of participation in FERP pursuant to 29.2 on or after 7/1/95, and whose participation commences with the beginning of the 1995/96 academic year or thereafter, shall be entitled to the yearly period of employment for no more than five (5) consecutive academic fiscal years. (27.76)

4. The time base of a PRTBP participant shall be considered full-time for the purpose of restrictions on additional employment. (30. 10)

5. Continued employment in the FERP shall terminate in the event of dismissal for cause, layoff, or failure to meet the employment commitment. (29.9)

Salary

Salary is pro-rated in accordance with the fraction of time of the assignment at the rank and step appropriate if the participant was full-time. (i.e., 1/2 time = 1/2 salary). Salary shall be paid in twelve equal payments. (30.12) ??

In addition to the retirement pay appropriate to the age and years of service at the time of retirement, participants are paid for the teaching assignment on a pro-rata basis, in accordance with the rank and level (step) held at the time of retirement (29.6).

Credit for Service

Service Credit is accumulated for retirement as though working full-time since retirement contributions are based on a full-time rate of pay. Social Security contributions are based on actual salary earned.

Since participants are retired, no service credit is accumulated through this program. For this same reason, there is no retirement contribution or Social Security withholding.

Sick Leave

Participants retain accumulated sick leave, and accrue additional sick leave on a pro-rata basis. (30.9)

Sick leave is converted to service credit upon retirement; however, up to 48 hours of sick leave may be carried into FERP. A maximum of 160 hours may be accrued during FERP Program. (29.16)

Other Leave

Participants are not eligible for sabbatical

Participants are not eligible for sabbatical

PRE-RETIREMENT REDUCTION IN TIME BASE PROGRAM (PRTBP)

leaves or other paid leaves. Leaves without pay may be granted at the discretion of the President or his/her designee, according to normal policy for such leaves. (30.8)

Benefits

Eligibility for or participation in health insurance, dental insurance, vision insurance, tax deferred annuity, deferred compensation programs and other fringe benefits continue as before, in accordance with the rules governing participation in and contributions to the particular plans. (30.7)

Application

Normally, applications are due six months in advance of the start of the academic year in which the pre-retirement is to begin (i.e., by March 1st of any year). The President may waive the required notice period. (30.1)

Procedure for Processing Applications

Requests for participation should be in writing, addressed to the Dean, Faculty Affairs & Professional Development via department chair and college dean, who must indicate their recommendation for approval or disapproval of the request. The request should include the following information:

- a) the name, rank, step, and birth date of the applicant.
- b) an appointment history sufficient to determine eligibility as outlined under "eligibility."
- c) the fraction of time requested (1/3, 1/2, or 2/3).
- d) the nature of the assignment requested (e.g., one semester full-time or one year half-time, etc.).
- e) the academic year or fiscal year in which the reduction in time base is to be effective.

Assignment Procedure After Approval

A Faculty Affairs Office Form 110 is required when there is a change in appointment or time base.

FACULTY EARLY RETIREMENT PROGRAM (FERP)

leaves or other paid leaves. Participants shall be granted one leave without pay if he/she is unable to teach due to personal illness. Such a leave shall not affect future participation in FERP. (29.21; 29.15)

Health and dental benefits are continued into retirement. Participation in other benefits programs is in accordance with the rules governing retired persons. The vision plan shall be effective for all FERP participants effective March 1, 1988; however, only those being paid by the university at that time may be enrolled. (32.4, 32.6)

Normally, applications are due six months in advance of the academic year immediately following the effective date of retirement (i.e., by March 1st of any year). The President may waive the required notice period. (29.2)

a) applicants should apply for a normal service retirement through the Human Resources Department.
b) at the same time, applicants should file a written statement of their election of the Early Faculty Retirement Program with the Dean, Faculty Affairs & Professional Development, via the department chair and college dean. The statement should indicate:

- 1) the effective date of retirement.
- 2) the semester in which the faculty member would prefer to teach.
- 3) the fraction of time of their assignment in the year prior to retirement.
- 4) request for carryover of up to 48 hours of sick leave into the FERP, if desired.

c) the Chair and Dean should indicate whether or not they approve the semester requested.

A Faculty Affairs Office Form 110 is required each semester to confirm the status of appointment regardless of whether the participant is teaching.

**PRE-RETIREMENT REDUCTION IN TIME
BASE PROGRAM (PRTBP)**

**FACULTY EARLY RETIREMENT PROGRAM
(FERP)**

**Additional
Information**

Transfer to the FERP is allowed provided the eligibility requirements are met. However, the employee would be eligible for one term at either 2/3 or 1/2 or 1/3 (not full-time) based on the reduced time base under PRTBP.

Participants may not serve on RTP committees. (29.17). Participants are subject to post tenure evaluation. Once the FERP program ends, the Human Resources Department may be contacted for further information.

Collective Bargaining Statement: Where the provisions of this benefits summary are in conflict with the Collective Bargaining Agreements reached pursuant to Chapter 12 (commencing with Section 3560), Division 4, Title I of the Government Code, the Collective Bargaining Agreements shall take precedence.