

FAQ's on Phased Retirement

- 1. What is Phased Retirement?** Phased retirement is a program that allows the in-unit faculty member to retire with the Florida Retirement System (FRS) and have a guarantee to be re-employed by the University after they have completed their “sit out” specified timeframe.
- 2. Who is eligible?** In-unit faculty are eligible for participation in Phased Retirement. Under the CBA Article 26.6(b), those faculty who are ineligible to participate are those who have received notice of non-reappointment, layoff, or termination or those who participate in the State's Deferred Retirement Option Program (DROP).
- 3. What are the age requirements for Phased Retirement?**
 - The UFF CBA states in Article 26.6 (a)(1) that the age requirement to participate in the Phased Retirement Program expires on the in-unit faculty member's 66th birthday.
 - This age cap in Article 26.6 (a)(1) has been lifted for 2020-2021 and 2021-2022 academic years. The Memorandum of Understanding signed on October 12, 2020, states that “In-unit faculty members who are age 65 and older during the 2020-2021 and 2021-2022 academic year and who meet all other eligibility requirements to participate in the Phased Retirement Program shall be allowed to participate...”
- 4. What are the benefits of Phased Retirement?** Phased retirement allows a faculty member to have guaranteed re-employment for up to five years with the University at ½ time with corresponding ½ pay after the “sit out” timeframe.
- 5. What is the “sit out” timeline, and why are faculty required to wait a certain amount of time prior to re-employment?** The Florida Retirement System and Florida Statutes require that retired faculty remain out of university employment for a set amount of time between the faculty member's retirement and re-employment. Information about the FRS timeline to re-employment is available here: https://www.myfrs.com/FRSPro_ComparePlan_Reemp.htm.
- 6. How long will the faculty member be required to “sit out” prior to re-employment?** Faculty should contact Jamie Sprague in Human Resources at 850.474.2694 or jsprague@uwf.edu to receive specific information relevant to the individual faculty member's re-employment timeline. The timelines may vary depending on the faculty member's specific retirement plan.
- 7. If a faculty member is eligible for a leave payout for unused accrued leave, when will the faculty member receive the payout?** Faculty shall, upon retirement, receive payment for

any unused accrued leave to which they are entitled. Leave payouts will be paid no later than the pay period after the faculty member's last in-unit paycheck.

8. **What is the process for opting into Phased Retirement?** The in-unit Faculty member needs to contact Jamie Sprague in Human Resources at 850.474.2694 or jsprague@uwf.edu. Once the in-unit Faculty member meets with Human Resources, Human Resources will initiate a form in DocuSign for the in-unit Faculty member to complete and send through the approval process.

9. **When a faculty member is retired for the specified timeframe, what benefits are available to the faculty member during that time?**

- Retired faculty identification card
- Use of the University library (i.e., public rooms, lending and research service)
- Listing in the University directory
- Placement on designated University mailing lists
- A University parking decal as provided to faculty currently active
- Use of University recreational facilities (retired faculty may be charged fees different from those of other faculty for the use of such facilities)
- The right to enroll in courses without payment of fees, on a space available basis, in accordance with the provision of Florida Statutes
- A mailbox in the department/unit from which the faculty member is retired, subject to space availability
- A University email address

10. **Can a faculty member keep University equipment during the specified timeframe?** No, University equipment will need to be returned to the University as the faculty member is completing the separation clearance form.

11. **Can a faculty member who pursues Phased Retirement also apply for faculty emeritus status if qualified?** Yes, a faculty member pursuing Phased Retirement who also qualifies for faculty emeritus status can apply for faculty emeritus. Eligibility requirements for faculty emeritus can be found [online](#).

12. **When should a faculty member who is entering phased retirement apply for faculty emeritus?** The letter of application or nomination may be submitted to the appropriate College or Library Dean as early as the year before the academic year in which the faculty member or librarian is retiring from UWF (or the calendar year, if the retirement is scheduled for December).

13. When should a faculty member complete the form for re-employment to the University? The form should be completed no later than February 1 for fall teaching and June 1 for spring teaching in the year prior to the re-employment year.

14. Will a faculty member need to complete employment paperwork with Human Resources prior to being re-employed by the University? Yes, the faculty member will be contacted by Human Resources to schedule an appointment to complete the appropriate employment paperwork completed prior to being re-employed by the University. This appointment will need to be in advance of the re-employment date.

15. When a faculty member returns to UWF after the designated retirement period, what is the faculty member's employment status at that time? The faculty member will be re-employed as an Other Personal Services (OPS) for one half ($\frac{1}{2}$) of the academic year. This equates to a .5FTE per both academic semesters in one academic year, or a 1.0FTE for one academic semester and 0FTE for the other academic semester in one academic year. The University and the faculty member may agree to less than one half ($\frac{1}{2}$) of the academic year.

16. How will the work assignment be determined when the faculty member returns to UWF? The Dean of the college will confer with the department to determine the teaching needs in the department. When a faculty member elects to enter phased retirement, tenure and permanent status are relinquished and the faculty member is classified as an OPS faculty member. The OPS work assignment will be teaching four courses (half-time employment) that can be split between (a) Fall, (b) Spring or (c) Fall and Spring. The OPS faculty assignment will not require the performance of research and/or professional service that is required of tenured faculty.

17. How will the work assignment for a 12-month faculty librarian be determined when the faculty member returns to UWF? Librarians on a twelve (12) month appointment upon entering the phased retirement program will have the same assignment during reemployment with a .5 FTE/half-time compensation with the exception of any supervisory responsibilities the Librarian might have. Supervisory responsibilities require full-time employment and therefore can be reassigned by the Dean of Libraries.

18. How will the work assignment for a Research Associate be determined when the faculty member returns to UWF? Research Associates upon entering the phased retirement program will have the same assignment during reemployment with a .5FTE/half-time compensation.

19. Will a faculty member receive annual evaluations during Phased Retirement? A faculty member re-employed as an OPS faculty member through Phased Retirement shall be evaluated consistent with other OPS faculty employees at the end of each teaching semester..

20. How will the salary be determined when the faculty member returns to UWF? The salary will be proportional to the faculty member's base salary on the last day worked prior to

the retirement date. An allowance will be given to the employee for an amount comparable to the pre-retirement employer contribution for health insurance and life insurance and any taxes associated with this amount.

Since the employee is being re-employed as an OPS employee, the employee will automatically be enrolled in the BENCOR FICA Alternative Plan. Please refer to this website: <https://uwf.edu/offices/human-resources/i-am-a/employee/retirement/ficaalt/#d.en.61548> for additional information regarding this plan.

21. Can a faculty member decline re-appointment once re-employed in the Phased Retirement Program? A participant may decline an offer of re-employment during any academic year. Such a decision will not extend the period of re-employment beyond the period of agreement.

22. Can the faculty member continue their employment with the University beyond the re-employment period? After the conclusion of the phased retirement program, the faculty member can be rehired as OPS on a year-to-year basis at the discretion of the Dean.

23. If I have questions about the Phased Retirement Program, who should I contact? Contact Jamie C Sprague, Associate Vice President Human Resources. She can be reached at 850.474.2694 or jsprague@uwf.edu.