

### Faculty Early Retirement Program (FERP)

#### Frequently Asked Questions

#### What is FERP?

The Faculty Early Retirement Program (FERP) is a program that provides a transition from full-time teaching to full-time retirement. It allows a faculty member to receive their retirement income plus receive up to one-half of a year's salary for teaching one semester each year or half-time both semesters each year. The program allows a faculty member to work a maximum of ninety (90) days per year (or 50% of the faculty member's regular time base in the year preceding retirement) while receiving full retirement income from the Public Employees' Retirement System (PERS). FERP is governed by Article 29 of the CBA.

#### Who is eligible to participate in FERP? Are lecturers and coaches eligible for FERP?

According to Article 29.1 of the Collective Bargaining Agreement, the program is available only to tenured faculty. Lecturers and Coaches are not eligible for the Faculty Early Retirement Program.

FERP is available to tenured faculty, librarians, and counselors. Employees wishing to enter FERP must have reached normal retirement (age 55 for those individuals with a retirement formula of 2%@55, age 60 for those whose formula is 2%@60, and age 62 for those whose formula is 2%@62.) In addition, they must be eligible for a service retirement.

#### How long may I participate in FERP?

Faculty retiring under the current CBA may participate for a maximum of five (5) academic/fiscal years in the program. Pursuant to Article 29 of the current CBA, faculty shall be entitled to the yearly period of employment for no more than five (5) consecutive academic or fiscal years. The length of possible participation for individuals entering FERP after the expiration of the current CBA is subject to negotiation between the CSU and CFA.

### **Do I need to receive approval to enter this program?**

FERP is an employment right guaranteed to tenured faculty under Article 29 of the CBA. A tenured faculty member cannot be denied entrance into the program, provided that all the conditions specified in Article 29 of the CBA are met.

### **Are there any deadlines that must be met?**

Yes. A faculty member wishing to participate in the program, must notify the President (or designee) in writing by completing the Notification of Intent to FERP at least six (6) months in advance of the beginning of the academic year in which participation in FERP is to commence.

### **What happens if I miss the deadline for notifying the President in writing but I still want to participate in FERP?**

Article 29.2 states that the President may waive the required six (6) month period for the written notification. However, they are not required to do so. Granting of waivers will be judged on the merits of each case. Please contact Academic Personnel Services at [aps@humboldt.edu](mailto:aps@humboldt.edu) as soon as possible.

### **What are the deadlines for retirement notification?**

You may complete the application process through your personal my|CalPERS account at [my.calpers.ca.gov](http://my.calpers.ca.gov). Easy-to-follow instructions will guide you step-by-step through the online application. You can submit your paper or online application when you are within 120 days from your retirement date. In addition to working with Human Resources and Academic Personnel Services, you must notify your department chair & college dean. Your notice of retirement and FERP participation must be submitted during the spring semester for the following academic year.

### **How am I notified of my FERP appointment?**

After you provide the President (or designee) with written notice, prior to the six-month deadline, of your intent to enter the program, the President (or designee) will acknowledge your notice and provide you with confirmation that you have been approved for FERP. Once you and the President (or designee) have signed the Notification of Intent to FERP form, a contractual relationship between you and the University will be established for the time that you continue in this program.

### **May I retire after the fall semester and start my FERP participation in January at the beginning of the spring semester?**

No. Article 29.5 states that participation in FERP shall commence at the beginning of the campus academic year.

### **If my birthday is in September, can I begin FERP in August but delay my retirement?**

No. Article 29.5 states that participation in FERP shall commence at the beginning of the campus academic year.

### **Can I retire and enter FERP following a sabbatical or difference-in-pay leave?**

Yes. Your notice of retirement and FERP should include your request to complete your return service obligation while on the FERP program.

### **What is the maximum FERP employment time base for instructional faculty?**

While participating in FERP, your post-retirement employment will be limited by both the CBA and PERS. Article 29 of the CBA limits your total CSU employment to 90 days per fiscal year or 50% of your regular time base in the year preceding retirement.

The period of employment during each campus academic year shall be based on the needs of the department and must be approved by the Dean and specified in an appointment letter to the participant.

FERP employment is available in two options:

- Full-time employment in the Fall or the Spring semester, not to exceed 90 workdays. Normally 12 units of instruction, plus 3 units of instructionally-related activities.
- Half-time employment for the academic year (not to exceed 50% of the employee's time base in the year preceding retirement, full-time equivalent is 12 units of instruction and 3 units of instructionally-related activities). Normally, 6 units per semester, plus 1.5 units of instructionally-related activities.

**Note:** Faculty can elect a lesser time base than stated above but cannot increase their time base throughout the five-year period.

A FERP participant who was in the Pre-Retirement Reduction in Time Base (PRTB) program immediately prior to retirement and who elects the FERP employment option of 50% of the regular time base in the year preceding retirement, would be limited to 50% of the PRTB time base as a FERP participant. For example, if a FERP participant was working half-time as a PRTB employee at the time of retirement, then they would be eligible for FERP employment at 25%.

### **What is the maximum FERP employment time base for Librarian faculty?**

While participating in FERP, your post-retirement employment will be limited by both the CBA and PERS. Article 29 of the CBA limits your total CSU employment to 90 days per fiscal year or 50% of your regular time base in the year preceding retirement.

Librarian FERP employment is available in the following options:

- Full-time employment (40 hours per week) not to exceed 960 hours (in slight excess of 5 months).
- Half-time (20 hours per week) not to exceed 960 hours or approximately 11 months.
- Half-time employment in the 10-month classification with 2 months off per year.

Librarians continue to earn vacation while on FERP and are encouraged to use vacation credits during their FERP employment.

**Note:** Librarian faculty can elect a lesser time base than stated above but cannot increase their time base throughout the five-year period.

**If I am a participant in the Pre-Retirement Reduction in Timebase (PRTB) program, could I retire from that program and participate in FERP?**

Yes. You could work half of the time base you were working in PRTB at the time of retirement. For example, if you were .50 in the PRTB program, you could work half-time (.50) one semester or .25 both semesters under FERP.

**May I determine the semester I work?**

Normally, the period of employment you request will be approved and every effort will be made to accommodate your request. However, the President (or designee) may determine that it is necessary, due to programmatic needs, to assign you to a different period of employment. The Department Chair and the Dean may be asked to review your request and make a recommendation to the President (or designee). Should there be a disagreement, a mutually acceptable outcome will be sought. However, if mutual agreement cannot be reached, the President (or designee) can alter the period of employment, provided that you receive a one hundred twenty (120) day notice.

**Can I change my semester of FERP employment?**

You may request a change in your term of employment and every effort will be made to accommodate your request. However, due to programmatic needs, the Department Chair and Dean may not be able to recommend approval of your request to the President (or designee). Whenever possible, requests for a change in the term of employment should be made at least one semester prior to the academic year in which you wish to make the change. Changes will normally become effective at the beginning of an academic year. Mid-year changes which would result in your working more than one semester in an academic year or more than half-time (50%) during both semesters in the academic year cannot be approved. For example, you could not teach full-time in the Fall semester and then change to half-time the following Spring semester.

Please consult with your Department Chair and Dean to ensure that the proposed change aligns with the operational needs of the department. After consultation with your Department Chair and Dean, please submit a written request to change the term of employment to [aps@humboldt.edu](mailto:aps@humboldt.edu) at least one semester prior to the academic year in which you wish to make the change.

### **Is it possible to reduce my time base once I enter FERP?**

Yes, in mutual agreement with the Dean and Department Chair. Be advised that your reduction shall continue for the duration of your FERP appointment. **You will not be able to increase your FERP time base once you have received a reduction.**

Please consult with your Department Chair and Dean to ensure that the proposed change aligns with the operational needs of the department. After consultation with your Department Chair and Dean, please submit a written request to [aps@humboldt.edu](mailto:aps@humboldt.edu) at least one semester prior to the academic year in which you wish to make the change.

### **Can I resign from FERP before completing five years?**

Faculty may resign from FERP at any time during the five-year program. The faculty member should submit a letter to their Department Chair and the appropriate Dean indicating the specific resignation date. A copy of the resignation letter should be forwarded to the AVP of Faculty Affairs and Academic Personnel Services.

### **May I be employed for summer/winter session?**

No. Article 29.14 prohibits additional employment within the CSU or its auxiliary organizations beyond the FERP contract period. Additionally, CalPERS regulations and the CBA provisions limit employment in FERP to 90 days or 50% of the hours worked in the last fiscal year prior to retirement, whichever is less. A FERP participant who works full time for one semester or half-time for two semesters has used up all available employment for the year and cannot accept additional work in Extension or summer.

### **Can I accept additional employment through SPF while participating in FERP?**

Article 29.14 prohibits additional employment within the CSU or its auxiliary organizations beyond the FERP contract period. However, if the Foundation or Auxiliary is a non-CalPERS employer, you may accept work from them. The 25% additional employment rules apply while you are in the FERP semester or academic year, if that is your term of employment.

### **May I work on grants while participating in FERP?**

FERP participants can have a portion of their regular work be supported by buy-outs from grants and contracts, just like tenure-track faculty (e.g., a grant could pay for one or more course releases). This does not affect the overall time base, compensation, or period of employment.

### **What priority do I have in course assignments?**

1. Regular Full-Time (Probationary or Tenured) Faculty and FERP Faculty
2. Teaching Associates, Volunteers, Administrators
3. Temporary Faculty following Article 12.29

### **What are my normal duties during my term of employment under FERP?**

Faculty members in the FERP program are considered tenured faculty and are expected to perform regular advising and other normal duties. This includes indirect instruction (formerly referred to as collateral duties), which are prorated based on your time base. For example, if you work full-time one semester, you will be assigned 3 WTUs of indirect instruction. If you work half-time for the academic year, you will be assigned 1.5 WTUs of indirect instruction each semester.

### **Am I expected to serve on committees while on FERP? Are there limitations as to the committees upon which I may be asked to serve? May I serve on evaluation committees, such as the IUPC?**

You are expected to provide service and participate in shared governance activities at a level commensurate with your appointment level. By approval of the President, you may be elected to a department RTP Committee or to a recruitment committee. When serving on a committee you have the same voting or other rights as any tenured faculty member.

### **Can I serve as a department chair while participating in FERP?**

FERP participants may serve as department chairs during the period of FERP employment. This includes faculty who were not serving as department chair at the time of retirement. Appointment is at the same rank as at retirement. The department chair stipend is added for the period of time served as department chair. However, the timebase may not exceed the allowable FERP timebase.

### **May I take a leave of absence without pay while on FERP?**

Normally, no; however, Article 29 allows participants to take one leave without pay for documented medical reasons for all or part of the period of employment. While the leave does not affect continued participation in FERP, the year in which you took a medical leave would count as one of your five years of participation in the program.

### **What provisions are made for sick leave?**

Usually, when a faculty member retires, they have any remaining sick leave credits converted to PERS retirement service credit. You may elect to carry forward up to six (6) days, or forty-eight (48) hours, of sick leave credits into FERP. While in the program, you will earn sick leave credits on a pro rata basis for up to six days (or forty-eight hours) a year and you may

accumulate a maximum of twenty (20) days of sick leave credits, or one hundred sixty (160) hours, during your participation in the program. This sick leave may not be added to your retirement service credit at the end of your FERP participation.

**When am I eligible for retirement and how is my CalPERS retirement salary calculated?**

A formula based on your age, years of service (at least five years of full time service), and your highest 12 month salary during your employment determines your monthly retirement salary. Ten months of full time service equals one year of service. At age 63, age no longer makes a difference in the calculation of your retirement salary. At retirement, unused sick leave credit will be converted and added to your years of service. For an estimate on your retirement salary, visit the CalPERS web site: [www.calpers.ca.gov](http://www.calpers.ca.gov). Contact CalPERS if you are uncertain of your retirement eligibility at (888) 225-7377.

**What is my salary as an instructional FERP faculty? How frequently do I get paid?**

In addition to retirement disbursements paid by CalPERS, FERP faculty will receive a salary based on the time base of their FERP participation. Throughout the five-year period, faculty will receive general salary increases as negotiated.

Your pay warrants will be issued as follows:

- Teaching Fall semester only: At the end of September, October, November, December, January, and February.
- Teaching Spring semester only: At the end of February, March, April, May, June, and July.
- Teaching Fall and Spring: At the end of September, October, November, December, January, February, March, April, May, June, July, and August.

**What deductions will my FERP paycheck contain?**

WITHHOLDING DEDUCTIONS FROM YOUR FERP & CALPERS EARNINGS			
Withholdings	FERP Earnings	CalPERS Earnings	Notes
Federal Taxes	Yes	Yes	N/A
State Taxes	Yes	Yes	N/A
CalPERS Contributions	No	No	N/A
Social Security	No	No	N/A
Medicare	Yes	No	If hired before 04/01/1986 with no service breaks, no deduction in FERP
Health Premiums	No	Yes	N/A



Dental Premiums	No	Premium paid by State	N/A
Vision Premiums	Premium paid by State	No	N/A
Long Term Care	No	Yes*	N/A
CFA Dues	Yes	No	N/A
403(b), 457, 401(k)	Yes	No	Voluntary Contribution; FERP faculty can continue contributions only during the semester they receive a paycheck.

*\*You must make arrangements with CalPERS at least 30 days prior to retirement to have Long Term Care premiums taken from your CalPERS check following retirement.*

**How do I maintain benefits coverage during FERP?**

You will be covered for workers’ compensation and the CSU will provide a CSU dental plan on the same basis as such a plan is provided to other faculty. The provision of such a dental plan shall require that you were enrolled in a CSU dental plan immediately prior to your service retirement. FERP faculty are eligible for vision care under the terms of a side letter to the CBA. All other available insurance benefits will be derived through your PERS retirement.

**Can I accept CSU employment after retirement or FERP? Can faculty work as part-time lecturers after completing FERP?**

Yes, the program entitles you to employment for five years under specified conditions. After you have completed your participation in the program, you may apply for part-time teaching or short-term full-time temporary employment. You are restricted by CalPERS regulations not to exceed 960 hours or 50 percent of the hours you were employed during the last fiscal year of service prior to retirement.

After completing FERP, faculty can commence teaching as a part-time lecturer up to the maximum of half-time (50% of the regular time base in the last full year proceeding retirement). Therefore, a faculty member who had been full-time, and then 50% in the FERP program could, at the conclusion of the FERP appointment, work as a part-time lecturer at no more than 50%. However, the faculty member who was formerly in the FERP program would be in a new category for hiring. As a part-time lecturer a new salary would be based on whatever the faculty member and their Department/School negotiates – the person does not automatically resume at the salary rate and rank at which they were previously paid. Also, part-time faculty are not compensated for committee work.

Care must be taken not to exceed the post-retirement restrictions imposed by CalPERS. You may also contribute to the University as volunteer faculty.





## **What provisions of the collective bargaining agreement apply to FERP faculty?**

All provisions of the collective bargaining agreement apply except:

- Article 14: Promotion
- Article 22: Leaves of Absence without Pay
- Article 24: Sick Leave – 24.1, 24.3, 24.4
- Article 27: Sabbatical Leaves
- Article 28: Difference in Pay Leave
- Article 32: Benefits – 32.1

## **Once I enter FERP, can I be terminated from University employment?**

Like all faculty employees, you still can be dismissed for cause, or terminated for failure to meet the employment commitment. As a FERP faculty, you would still be a tenured faculty member and a member of the collective bargaining unit with all the rights and protections thereto.

## **Who do I contact for additional FERP or retirement related questions?**

For questions about retiring from CalPERS, please contact Human Resources at [hr@humboldt.edu](mailto:hr@humboldt.edu) or CalPERS at (888) 225-7377.

For questions about FERP or related provisions of the collective bargaining agreement, please contact Academic Personnel Services at [aps@humboldt.edu](mailto:aps@humboldt.edu).