

Resolution to Remove Early Retirement Policy Language

Professional Relations Committee

Faculty Senate

Ohio University

Second Reading March 14, 2022

Whereas Ohio University no longer offers an Early Retirement Program for faculty as described in Ohio University Handbook Section III.R,

Be it resolved that the language which comprises Ohio University Faculty Handbook Section III.R shall be modified as follows:

R Early Retirement Policy

The Early Retirement Program was discontinued March 20, 2020. Faculty participating in the early retirement program prior to March 20, 2020 may continue participating in the program under the terms, conditions, and rules effective at the time of enrollment. The early retirement policy rules in place immediately prior to the discontinuation of the program are maintained by the Office of the Provost.

~~**General:** A tenured faculty member eligible for retirement under the STRS and wishing to continue to teach part-time may elect to do so under the early retirement policy. Those faculty enrolled in the Alternative Retirement Plan (ARP) will be eligible for the University's Early Retirement program if they meet the same eligibility requirements as those enrolled in STRS. Faculty enrolled in the ARP are not eligible for those benefits that STRS employees receive from STRS. In this event, an Early Retirement Agreement is signed by the faculty member, department chair, dean, and Provost. Such a faculty member will change status from Tenure Track to Tenure Track (retired). The Early Retirement Agreement remains in effect as long as the faculty member wishes to continue part-time teaching and has not reached 70 years of age by August 1 of the upcoming year.~~

~~**1 Workload:** During early retirement, the faculty member will be permitted to work the equivalent of one-third of the department's annual teaching load which could include a mix of teaching and/or equivalent duties as would benefit the department and as desired by the faculty member. What constitutes one-third teaching load should be flexible enough to support departmental needs in teaching, research and service. A faculty member could satisfy the workload requirement through a variety of mechanisms: by teaching courses equivalent to 1/3 the regular departmental teaching load or by performing a mix of teaching, research and/or service as would be an equivalent time commitment. For faculty on 10, 11, or 12-month contracts, workload will be prorated to a 9-month workload. Those faculty with evidence of on-~~

~~going research productivity at the time of retirement may be able to include research/scholarship/mentoring of graduate students in their workload agreements if it is of benefit to the department. Additionally, a significant service component may be included as part of the workload if needed by the department. The distribution of those duties will be determined through collaboration between the faculty member and his/her/their academic department chair and after consideration of the needs of the department. Additionally, consideration must be given to the pay and tax implications of having early retirees teach on multiple semesters (or neither semester) in a single calendar year even though the semesters are in different academic years. For colleges that include summer session as a normal part of a faculty member's annual contract, the faculty member may, after consulting with his/her/their department chair, choose to fulfill his/her/their obligation during summer. If the regular departmental teaching load is not divisible by 3, then a multi-year arrangement can be made.~~

- ~~2—**Compensation:** The standard arrangement will be that the faculty member teaches the equivalent of one third of the specified departmental teaching load for one third of the annual base salary. The salary amount will be determined according to the following pattern: initially, to determine the salary for the year after retirement, the faculty member's base salary preceding retirement (adjusted according to the departmental raise pool) will be used. Faculty on 10 , 11 , or 12 month contracts will have their salaries prorated to nine month contracts. In following years, the salary will be adjusted by the average percentage increase afforded the Tenure Track faculty as a whole. An adjustment based upon a similar procedure will be made annually. Any special financial arrangements for a faculty member teaching under this policy must be approved by the Provost.~~
- ~~3—**Annual Review:** Early retired faculty will have their teaching, service and research reviewed annually, covering duties specified in their agreement and in accordance with departmental procedures.~~
- ~~4—**Insurance:** Beginning at retirement and continuing to age 70, the University provides life insurance under the University's group policy for faculty. Medical insurance is provided by STRS. (See Section III.G.) Faculty members enrolled in ARP are not currently provided medical insurance. (See <http://www.ohio.edu/hr/benefits/financial/retirement.cfm> for information.)~~
- ~~5—**Special Arrangements:** During any academic term when the faculty member is on duty, appropriate office space, parking privileges, use of facilities, and similar perquisites will be afforded the faculty member teaching under this policy. During the periods when the faculty member is not on duty, the perquisites as described under Emeritus Status (Section V.F) will be accorded the faculty member.~~

Be it further resolved that a task force comprised of representatives from faculty, university Human Resources, and university legal services discuss alternative options to the former Early Retirement Program [within Spring semester 2021-22](#).