

RETIREMENT AND REEMPLOYMENT

Academic Personnel Retirement and Re-employment
Information



UNIVERSITY *of* WASHINGTON
OFFICE OF ACADEMIC PERSONNEL
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AGENDA

- Eligibility
- Applying to retire
- Emeritus
- Working after retirement

RETIREMENT ELIGIBILITY

ELIGIBILITY TO RETIRE FROM UW

- Dependent on rules of employee's plan (UWRP or DRS-administered plan)
- UWHR Benefits website has plan-specific information

[UWRP: Preparing to Retire](#)

[TRS 3: Preparing to Retire](#)

APPLYING TO RETIRE

REQUIRED NOTICES

- Faculty and librarians: written notice to the dean/chancellor at least one quarter ahead of retirement date
- Other academic personnel: written notice to supervisor as soon as possible, but no less than two weeks ahead of retirement date
- More guidance for academic personnel on OAP's [Leaving the UW page](#)

UW RETIREMENT APPLICATION

- Online application required
 - Within 6 months of UW separation date
 - No later than 60 days after separation date

[UW Retirement Checklist](#)

EMERITUS

EMERITUS ELIGIBILITY

- Retirement from UW at professor or associate professor rank in tenure, WOT, research, teaching or clinical track
- 10 or more years of meritorious service as a faculty member or librarian

[UW Faculty Code Section 24-34 B.13](#)

[UW Librarian Personnel Code Chapter II Section B 4.a](#)

EMERITUS BASICS

- Should be considered at the time of retirement
- Appointment may start the day after retirement or within one year following retirement
- Lifetime appointment
- May be paid or unpaid

WORKING AFTER RETIREMENT

TENURED FACULTY

- Vested right to re-employ
 - Age 62 or older
 - Limited to 40% of tenure-funded portion of salary at time of retirement
 - Vested right limited to 5-year window immediately following retirement
 - State-funded re-employment must be classroom teaching

NOTES ON VESTED RIGHT

- Retiring prior to the end of an academic year does not extend the 5-year window
- Skipping a year does not extend the 5-year period
- Faculty who retire before age 62 forego their vested right to re-employ
- Re-employment beyond the 5-year window at unit's discretion

NOTES ON VESTED RIGHT

- The University retains the right to discontinue reemployment on evidence of failure to meet expectations.
- Reemployment can be voided if the reemploying program is eliminated, or in the event of a financial emergency.

FACULTY WITHOUT TENURE

- Re-employment at unit's discretion
- Supported by grants, contracts, self-sustaining instructional funds, or clinical fees
- Limited to 40% of salary at time of retirement

CALCULATING 40%

- Nine month service period
 - 40% of 9 month salary over 12 month period (July 1-June 30)
 - Consideration of summer salary history may be considered by request to the Vice Provost for Academic Personnel
- Twelve month service period
 - 40% over 12 months (July 1-June 30)

COMPENSATION

- Base salary should be the same as rate at time of retirement
- Reemployed retired faculty members are not eligible for merit-based salary increases

RETIREMENT DATES

- Termination date: Last day of work*
- Retirement date: First day of month following termination

June 15 termination=July 1 retirement

December 31 termination=January 1 retirement

*Consult with UWHR Benefits if the planned termination date falls on a weekend

REHIRING IN WORKDAY

- Choose the appropriate [title and rank](#) based on retiree or emeritus status
- See the [Hire Emeritus](#) and [Hire and Change Job For Unpaid Academics user guides](#) and the [Emeritus Employee Type Decision Tree](#) for more information.

QUESTIONS?

- Contact your AHR Specialist
- Email acadpers@uw.edu

Returning to Work After Retirement



BENEFITS

UNIVERSITY *of* WASHINGTON

Human Resources



Retirement Plan Terms Controlling

- > This presentation is current as of today's date
- > This presentation is informative only
 - Details in this presentation are not exhaustive
 - Plan rules are sometimes abbreviated for clarity's sake
 - You should not rely on the presentation examples in planning for your own situation
 - Your actual limits will be determined in accordance with the retirement plan you retired under



Agenda

- > **UWRP Return-to-Work Retiree**
- > **DRS Return-to-Work Retiree**
- > **Benefits as a Return-to-Work Retiree**



UWRP Return-to-Work Retiree

- > Applies to all UWRP retirees**
- > Rules are set by the University of Washington and state law**
- > More information can be found online at <https://hr.uw.edu/benefits/retirement-plans/nearing-retirement/return-to-work-after-retirement/>**



UWRP Return-to-Work Retiree

- > To become a UWRP retiree you must:**
 - Apply for retirement with UW**
 - Meet age and service requirements**
 - End employment with UW**



UWRP Return-to-Work Retiree

- > You must identify yourself as a UWRP retiree if you return to work at UW**
- > There is no restriction on how quickly you can come back to work at UW**
 - Immediately returning to work may cause difficulties in gaining access to retirement funds**



UWRP Return-to-Work Retiree

- > You are limited by the UWRP Plan Document to working a maximum of a 40% FTE position as a return-to-work retiree over an academic year (July-June)
- > Academic HR further defines how this 40% is calculated for faculty online at <https://ap.washington.edu/ahr/working/leaving-the-uw/working-after-retirement/>



UWRP Return-to-Work Retiree

- > Faculty UWRP return-to-work retiree's 40% FTE is based on your appointment and base salary at the time of retirement.**
 - Those who retire from 9-month appointments are limited to 40% of their 9-month academic year base salary**
 - Those who retire from 12-month appointments are limited to 40% of their 12-month academic year base salary**



UWRP Return-to-Work Retiree

- > If you exceed your 40% FTE limit as a return-to-work retiree, you will be barred from working the remainder of the academic year**



DRS Return-to-Work Retiree

- > Applies to anyone who retired from TRS, PERS, or any other DRS retirement plan
- > Rules set by the Washington state Department of Retirement Systems (DRS)
- > TRS 3 rules can be found online at <https://www.drs.wa.gov/publications/member/multisystem/p23returntowork/>



DRS Return-to-Work Retiree

- > **Must be retired to be covered under return-to-work laws**
 - **Meet plan rules for age and service requirements**
 - **Apply for retirement with the DRS**
 - **End employment with UW**
 - **Apply for retirement with UW**
 - **Begin receiving your benefit payments**



DRS Return-to-Work Retiree

- > Must identify yourself as a DRS retiree before being rehired**
- > Must wait at least 30 days after your retirement date before returning to work**
 - Retirement date is the first of the month after you separate employment and begin receiving a benefit payment**



DRS Return-to-Work Retiree

- > If you return to work before 30 days have passed your TRS 3 benefit will be reduced by 5.5% for every 7 hours you work per month at UW**
- > The reduction will continue until you stop working for 30 days**



DRS Return-to-Work Retiree

- > If you return to work before your retirement date your retirement application at the DRS will be cancelled.**



DRS Return-to-Work Retiree

- > As a DRS return-to-work retiree you are limited to working 867 hours each calendar year (Jan-Dec)**
- > If you work more than 867 hours in a calendar year your monthly benefit will stop**
 - Benefit payments will restart when you end employment or at the beginning of the next calendar year, whichever is first**



DRS Return-to-Work Retiree

- > Early Retirement using 2008 ERF limitation**
 - You cannot work in any capacity for a DRS covered employer (UW) and receive your benefits payments.**
 - You won't receive your benefit payment for any month in which you work.**
 - Restriction ends when you reach 65, at which point the 867 hour limit applies**



Benefits as a Return-to-Work Retiree

- > Both DRS and UWRP return-to-work retirees may be eligible to receive employer sponsored PEBB benefits in retirement
 - Eligibility will be position dependent and individually reviewed
- > Both DRS and UWRP return-to-work retirees may be eligible to continue contributions to UW VIP



Q&A

Q: If emeritus faculty return to work as unpaid, do they have voting rights?

A: No; retired faculty only have voting rights while in paid reemployed status

Q: Is the age for retirement eligibility based on the retirement plan, TRS 3 or UWRP?

A: Yes; specific plans may have specific requirements including early retirement options.

Q&A

Q: I'm confused about when the retirement application is due. Is it 6 months or 60 days (slide 7)?

A: The UW retirement application is submitted as early as 6 months prior to retirement date or up to 60 days after leaving employment. If the retirement application is submitted more than 60 days after employment end date, the faculty member will NOT be a UW retiree.