

Faculty Early Retirement Program

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Office of Faculty Affairs & Development
CSU Dominguez Hills

November 13, 2023

CSUDH

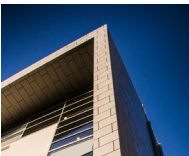
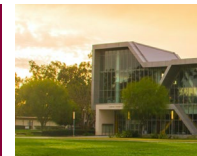
DIRECTORY

CSUDH

CALIFORNIA STATE UNIVERSITY
DOMINGUEZ HILLS

What is the Faculty Early Retirement Program (FERP)?

- Program allows eligible tenured faculty (including tenured librarians and counselors) who retire to continue employment after retirement.
- Faculty continue to be deemed tenured during FERP.
- Faculty can “FERP” for up to five consecutive years.
- Faculty who are granted service retirement from the California Employees Retirement System (CalPERS) may participate.
- FERP faculty are not eligible for promotions, sabbatical leaves, and difference in pay leaves. They are not eligible for professional development stipends and additional pay.
- FERP faculty may serve as department chair, albeit rare.

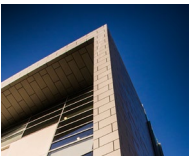
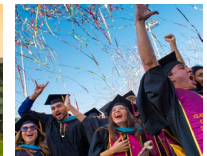
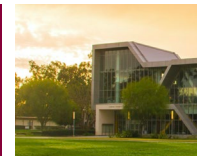


Eligibility for FERP

Tenured faculty

- minimum age to participate is 55
- eligible to retire with CalPERS
- with approval of the President or designee.

Please review [Article 29](#) of the CBA
[Collective Bargaining Agreement](#)

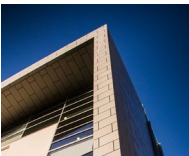
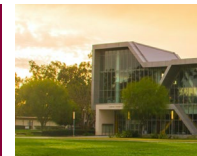


CalPERS Retirement Eligibility, Salary Calculation and Sick Leave Conversion

Contact CalPERS to determine your retirement eligibility and salary estimate prior to applying for the FERP program.

At retirement, any unused sick leave credit will be converted and added to your years of service.

www.calpers.ca.gov / 888-225-7377



Applying for Retirement and FERP

Contact the campus Benefits Manager for assistance starting the CalPERS retirement process.

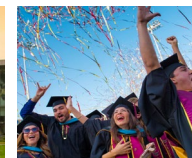
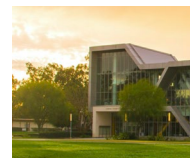
File FERP Application with the Office of Faculty Affairs at least six months prior to the beginning of the academic year you wish to start the program. Please contact FAD for more information.

Benefits Manager: Diana Diaz

didiaz@csudh.edu / 310-243-3005

Faculty Affairs: Cheryl Koos

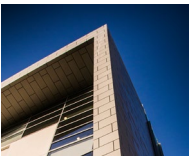
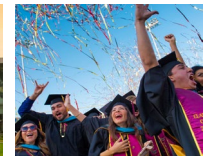
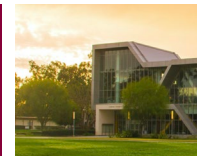
ckoos@csudh.edu / 310-243-3766



Applying for Retirement and FERP

CalPERS retirement application must be completed and processed by CalPERS. This application process can be completed through your personal myCalPERS account at my.calpers.ca.gov. Hard copy applications also can be received in a local CalPERS office or via mail to Sacramento no *sooner* than 120 days (4 months) prior to your elected retirement date.

You might find the CalPERS publication, [“Planning Your Service Retirement”](#) helpful.

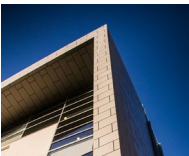
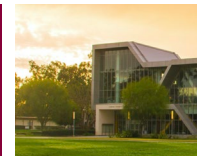


Applying for Retirement and FERP

The **FERP Application Form** can be found on the Faculty Affairs website

<https://www.csudh.edu/faculty-affairs>

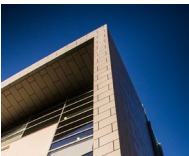
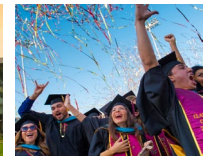
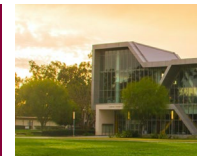
Forms & Documents > Leaves & Retirement > [FERP Application Form](#)



Applying for Retirement and FERP

Once the President (or designee) approves your participation in FERP, you will receive a notification letter which will include your acceptance, period of employment, and salary information.

You should receive notification within one month of the FERP application submission deadline.



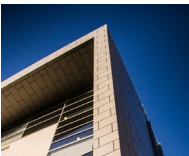
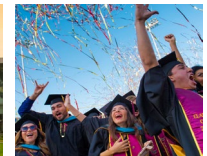
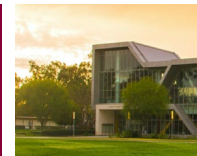
Emeritus Status

Criteria for Emeritus Status [PM 2014-02](#):

- Retirement as a full-time, tenured or lecturer faculty member with a minimum of 10 years of service at the University;
- For lecturer faculty, 10 full-time equivalent years service;
- Department estimation that the retiree has served “honorably and well”;
- Favorable recommendation from faculty of retiree’s department.

Request for Emeritus Status Form: <https://www.csudh.edu/faculty-affairs>

Forms & Documents > Leaves & Retirement > [Emeritus Request Form](#)



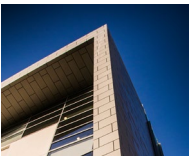
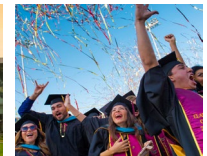
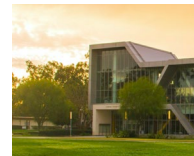
Rescinding Request to Retire and FERP

CalPERS permits you to rescind your retirement application before your first pension check is cashed.

You must immediately notify CalPERS by phone or in writing with additional notification to Diana Diaz, Benefits Manager. You must provide a copy of the letter from CalPERS rescinding from retirement.

CalPERS: www.calpers.ca.gov / 888-225-7377

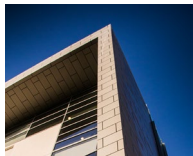
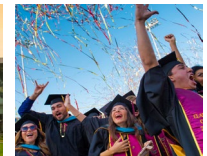
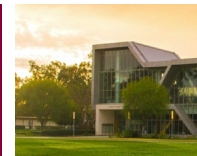
CSUDH: Diana Diaz didiaz@csudh.edu / 310-243-3005



Ending FERP Early

You may notify the University in writing if you decide to end your FERP status prior to the five-year norm.

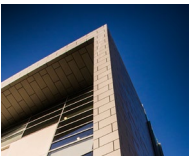
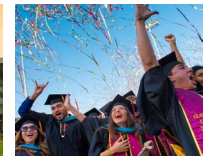
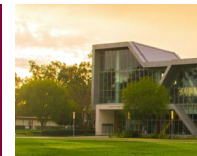
The FERP appointment can be terminated in the event of dismissal for cause, layoff, or failure to meet the employment commitment.



FERP Timebase / Workload

FERP employment is available in two options:

- **One semester per academic year:** Full-time employment in the Fall OR Spring semester, not to exceed a total of 90 workdays. Normally 12 units of instruction, plus 3 units of indirect assignments (service).
- **Half-time for the academic year:** (not to exceed 50% of the employee's time base in the year preceding retirement) Normally, 6 units per semester, plus 1.5 units of indirect assignments (service).



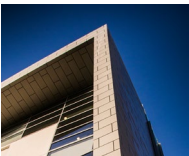
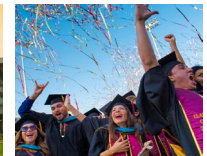
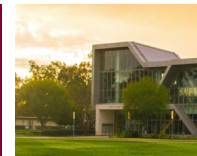
FERP Timebase / Workload

All or a portion of the teaching assignment may be in Extended Education and will count towards your 960 hours per fiscal year.

You may not teach in lieu of service responsibilities.

CBA Article 29.18: A participant shall be required to perform normal responsibilities and his/her share of normal duties and activities.

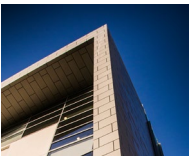
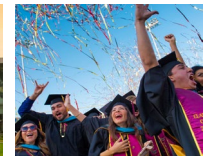
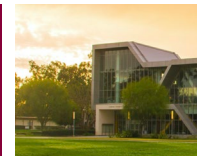
12-month Instructional Faculty must convert to Academic Year for FERP.



FERP Timebase / Workload

Semester-only FERP faculty whose term of employment is less than 90 days: the calculation of the period of employment may include days worked in summer session/ special session or CSU extension that do not coincide with the period of FERP employment.

The total of FERP plus summer/ special session/ extension may not exceed 90 days. CSU employment in summer/ special session/ extension is not available to academic year FERP faculty already working 90 days, since they already have reached the allowable employment limit.



FERP Timebase / Workload

It is critical for both the campus and the FERP participant to ensure work remains within the timeframes provided under law.

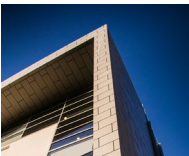
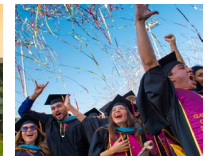
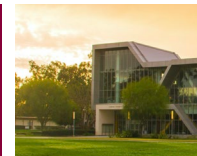
If a FERP participant exceeds the permitted work limitations, the FERP participant is subject to reinstatement.

FERP Time Base (12-Month Librarians/Counselors)

Full-time (40 hours per week) or Half-time (20 hours per week) employment can't exceed 960 hours in a fiscal year.

Reducing FERP Time Base

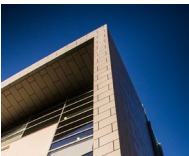
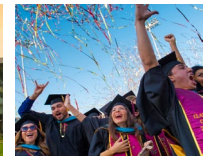
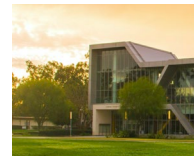
You may request to permanently reduce your FERP time base; however, once the time base is reduced, it can never be increased again.



Additional Employment During FERP

CBA restricts FERP faculty to 90 days employment or 50% employment over the academic year after your retirement date. Summer session employment after starting the FERP is not permitted.

Toro Auxiliary Partners (TAP)/foundation employment is permitted during FERP employment only if TAP is a non-CalPERS employer; if you accept work from the TAP, 25% additional employment rules apply while you are in the FERP semester, or academic year, if that is your term of employment (See CBA Article 29.14).



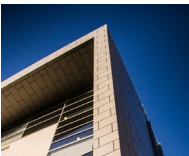
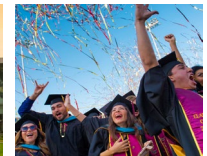
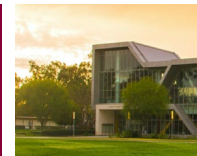
Pre-Retirement Reduction in Timebase (PRTB)

After reaching age 55, but before 65, T/TT faculty may apply to phase into retirement for a five-year period at $\frac{2}{3}$, $\frac{1}{2}$, or $\frac{1}{3}$ time base (CBA, Article 30).

Receive prorated pay while continuing to make full monthly PERS retirement payments.

Earn full year of PERS service credit for each year worked.

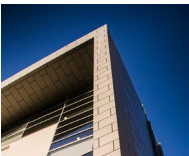
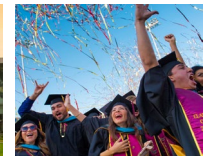
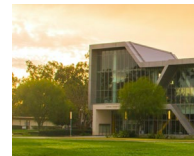
At the end of the five-year period, faculty can retire and enter FERP, **but the FERP time base is limited to 50% of the PRTB time base.**



Changing the Semester of FERP Employment

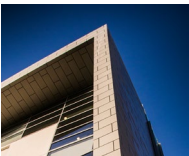
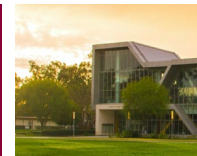
FERP faculty may formally request a change in the semester of FERP employment.

To request a change in semester, you must obtain approval from your department chair and Dean. Following that approval, the request must be forwarded to FAD. Following Provost and President/Designee's approval, the change in semester will be made.



Paychecks

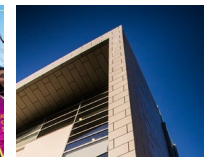
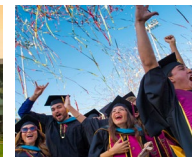
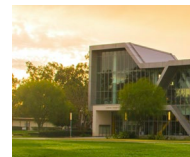
You will receive a monthly retirement check from CalPERS. Your retirement salary is based on a retirement formula using your total service credit, your age at retirement, and your highest average annual compensation (base pay rate, not earnings) during any consecutive 12- or 36-month period throughout your CalPERS career.



Paychecks

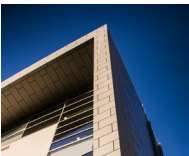
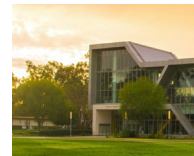
You will also receive a monthly FERP employee paycheck. Your rank and monthly salary will be your normal base salary rate immediately prior to retirement with any required proration for a less than full-time time base.

- Deductions for state and federal taxes, union dues/fees, Medicare, and parking will continue to be taken out of your FERP paycheck.
- No deductions for CalPERS retirement, Social Security (OASDI), or medical benefits.



Paychecks

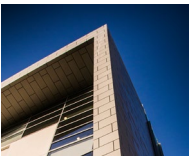
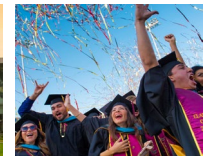
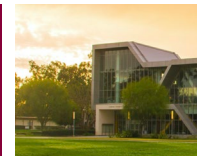
- You will receive negotiated general salary increases for your FERP pay.
- Direct deposit is an option, but one-semester FERP faculty must re-enroll each year.
- FERP faculty who are appointed for only one term per year must be separated at the end of each term and reappointed at the start of the next period of employment.
- Full Academic Year faculty will receive twelve monthly checks, normally at a 50%, from around October 1 through September 1.



Benefits Information

Health benefits are covered from your monthly CalPERS retirement check through deductions.

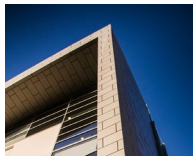
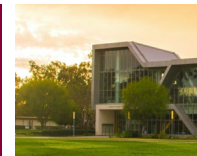
Vision: Vision coverage is paid 100% by the CSU during FERP. When the FERP period has ended, contact the Benefits Manager for an enrollment form to continue coverage with VSP via the Voluntary CSU Retiree Vision Plan (you will pay for the coverage).



Benefits Information

Dental: Retiree enhanced dental coverage is paid 100% by the CSU during FERP if your time base does not reduce below .5 FTE when you are working).

When the FERP period has ended, you will have the opportunity to continue your enrollment in voluntary retiree enhanced dental coverage for a monthly fee. Otherwise, your dental coverage reduces to retiree basic coverage and is paid 100% by the CSU.

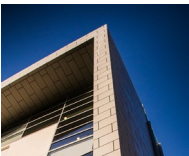
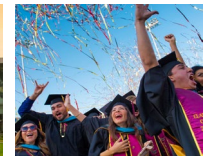
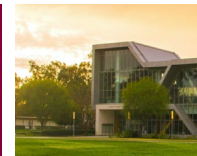


Benefits Information

You have the option to continue a number of voluntary benefits you were enrolled in as an active employee
e.g.: life insurance, critical illness, home/auto insurance

Other benefits are available to you as a retiree regardless of enrollment as an active employee
e.g. pre-paid legal, pet insurance

FERP participants are eligible for Fee Waiver benefits during their teaching semesters (active pay status).

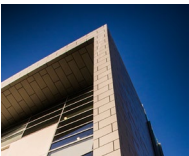
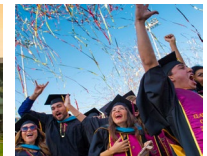
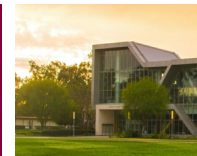


Sick Leave / Leave of Absence Without Pay

You can only accrue a maximum 160 sick leave hours during FERP (208 hours, if you elect to carry over the maximum 48 hours of sick leave credits at the time of retirement).

Full-time, semester-only FERP faculty accumulate **8 hours of sick credits hours per month** while working or **4 hours per month for 50% academic year FERP faculty.**

FERP faculty may be granted only one leave of absence without pay for personal illness during the five-year FERP period.
A LWOP does not extend the FERP period beyond five years.

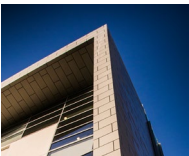
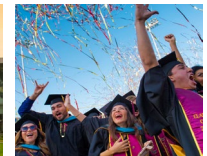
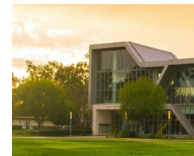


403(b), 401(k), 457 Retirement Savings Plans

You can continue to contribute to a 401(k), 403(b) and 457 plans during FERP for the months you receive a paycheck.

Semester-only FERP faculty must go online to change contributions prior to each term worked.

You should receive tax advice from a qualified professional.

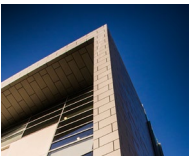
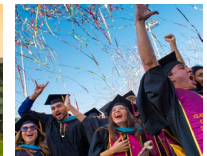
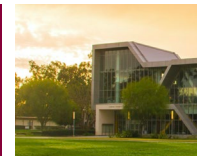


CSU Employment After FERP

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 (the year before the FERP period began).

Fifteen (15) semester weighted teaching units (WTU) is the **maximum workload** a fully-retired former full-time T/TT faculty can teach **within a year**.

You will be assigned a Lecturer classification at a salary rate appropriate to that classification.



Campus and CalPERS Contacts

CSUDH Campus Contacts

- Benefits Manager: Diana Diaz
didiaz@csudh.edu / 310-243-3005
- Faculty Affairs: Cheryl Koos
ckoos@csudh.edu / 310-243-3766

CalPERS Regional Information

<https://www.calpers.ca.gov/page/contact/headquarters-regional-offices>

CalPERS General Contact Information

www.calpers.ca.gov / 888-225-7377

