



Minnesota
STATE COLLEGES
& UNIVERSITIES

Human Resources Guideline & Interpretation

MSCF Faculty Phased Retirement

RET0001

Purpose: To clarify the phased retirement program.

Affects: All Colleges

Authoritative References: The employment contract between the Minnesota State Colleges and Universities Board of Trustees and the Minnesota State College Faculty Association, Article 16 – Sick Leave Liquidation, Section 6 - Phased Retirement Program; [M.S. 354.66](#); M.S. [354A.094](#); and M.S. [354B.31](#).

Required Form(s): [Application for Phased Retirement form](#).

Responsibility for Implementation: It is the responsibility of the college president, in concert with the chief human resources official, to assure that the requirements of the bargaining agreement are met.

Attachments: None

Introduction:

The following process shall be followed to ensure proper use of the phased retirement program.

Clarification on Eligibility, Application Procedure and Terms of the Program: No more than seven (7) percent of unlimited full-time faculty members are eligible to participate at any one time. However, if eligible applicants [who are within the 7%] drop their program request, the applicants who had exceeded the seven (7) percent will be granted approval into the program on a seniority basis. Except in single person programs/departments no more than 50% of the faculty member may access the program.

Unlimited faculty members who are 55 years of age and who have at least ten (10) FTE years of service in Minnesota community colleges shall upon application be granted participation in the phased retirement program.

Faculty members must submit a written request to their college president, using the MnSCU application form, prior to the end of the fall semester in the academic year prior to the requested start date of participation in the phased retirement program.

The length of the phased retirement period and the faculty member's annual workload shall be mutually agreed to by the faculty member and the college president.

Length of time in the program can be no less than one (1) year and no more than six (6) years. Annual regular workload cannot be less than .40 FTE and no more than .80 FTE for the academic year. The following provisions apply to overload:

If the MSCF member worked overload in the year immediately prior to participating in the phased retirement program, the dollar value of the pro-rata portion of the overload is available to the employee as part of their phased appointment. The FTE of the immediately prior year that is over 1.0 FTE is applied to the employee's base salary to determine the dollar value of the overload; the employee may then earn in phased retirement a portion of these dollars that are proportionate to the employee's phased retirement assignment. **This dollar limit stays constant in each year of the employee's participation.** The employer is not responsible for any retirement contributions over 1.0 FTE for phased retirement participants.

Each application and any subsequent request for a change will be considered on a case-by-case basis and must be mutually agreed to by the faculty member and the college president. Requests to extend the length of participation or to adjust the annual workload must be initiated prior to the end of the existing approved program.

Initial and any subsequent changes to the faculty member's participation in the program must be documented in writing, with a copy forwarded to the chancellor's designee.

At the end of the phased retirement period, the faculty member must retire from MnSCU.


With prior approval of the Office of the Chancellor, the faculty member and the college president **may** mutually agree to end the phased retirement program early if exceptional/unique circumstances give cause for this action to be taken. The faculty member must then return to full-time employment. A draft of the letter approving the end of a phased retirement program must be forwarded to the Office of the Chancellor for review and approval.

Benefits:

- Sick and personal leave will accrue on a pro-rated basis.
- Normal summer session rotation rights will be maintained. (If eligible for overload per the calculations above)
- Insurance eligible as if working full-time.
- Retirement eligible as if working full-time.
- Faculty members on phased retirement will maintain their eligibility for a sabbatical leave. After entering the program any remaining years of service [on an FTE basis] needed to qualify for a sabbatical will be earned at the rate [pro-rated basis] of the phased retirement program agreement.

- The faculty member's salary and other sabbatical benefits shall be the same as for a full-time faculty member.
- Sabbatical return requirements will also be on a pro-rated basis. The return requirement must be attainable within the approved length of the program to be eligible for sabbatical. [e.g., if on 50%, then two years will equal one full-time year of return.]
- Step movement will be counted as if working full-time.

Original approval: **January 14, 1997**
Revised: **July 28, 2005**
 December 22, 2005
 March 13, 2009



Vice Chancellor, Human Resources

March 13, 2009

Date