

Georgia Southern University

Georgia Southern Commons

Faculty Senate Index

Faculty Senate

4-30-2019

Faculty Retirement Policy

Jonathan Hilpert and Faculty Welfare Committee
Georgia Southern University

Follow this and additional works at: <https://digitalcommons.georgiasouthern.edu/faculty-senate-index>



Part of the [Higher Education Administration Commons](#)

Recommended Citation

Hilpert and Faculty Welfare Committee, Jonathan, "Faculty Retirement Policy" (2019). *Faculty Senate Index*. 700.

<https://digitalcommons.georgiasouthern.edu/faculty-senate-index/700>

This motion request is brought to you for free and open access by the Faculty Senate at Georgia Southern Commons. It has been accepted for inclusion in Faculty Senate Index by an authorized administrator of Georgia Southern Commons. For more information, please contact digitalcommons@georgiasouthern.edu.

Presidential Action

Georgia Southern University-Statesboro Campus

Motion: Faculty Retirement Policy

Signature: 

Date: 5-21-2019

Dustin Anderson
Faculty Senate President

Recommend for:

- Approval
- Disapproval


Signature: 

Date: 5-23-2019

Carl Reiber
Provost and Vice President for Academic Affairs

Comments:

- Approve
- Disapprove
- Remand

Signature: 
Dr. Kyle Marrero
President

Date: 5/28/19

Comments:

Senate Executive Committee Motion Request

Approved by the Faculty Senate: 5/21/2019

Not Approved by the Faculty Senate:

Approved by the President: 5/28/2019

Approved by the President's Cabinet:

Faculty Retirement Policy

Submitted by: Jonathan Hilpert

4/30/2019

Motion(s):

Motion to Approve the Faculty Retirement Policy

Rationale:

The proposed faculty retirement policy implements changes required to bring the handbook policy in alignment with the BOR policy. No senate changes to BOR wording can be accepted.

Response:

SEC: Approved to move to the floor.

Minutes 5-21-2019

Motion – Update to sections 321.04 (Retirement) & & 321.05 (Emeritus/a Policy) in the Faculty Handbook – Jonathan Hilpert (COE), Faculty Welfare Committee, Chair (pages 3-6) was not present. Dustin Anderson (CAH) acknowledged Hilpert's excellent work leading the FWC on the large amount of material they covered this year, and delivered the report on his behalf.

Report: Changes were made in the sections noted above so that the GSU Faculty Handbook would be in alignment with BOR.

Motion: Richard Flynn (CAH) made a motion to approve. Wayne Johnson (CEC) seconded.

Discussion: There was no discussion.

Vote: The motion to approve passed.

321.04 Retirement

All faculty employed one-half time or more on a regular basis at the University are required as a condition of their employment to participate in the Teachers Retirement System of Georgia or the Regents Retirement Plan. A faculty member has 60 days from the date of hire to choose a retirement plan, or the faculty member will default into the Teachers Retirement System of Georgia plan.

Board of Regents policy, *Section 8.2.8.2*, identifies the criteria that a faculty member must meet to retire from the University System of Georgia. The following language outlines the definition and eligibility for retirement.

~~Effective October 1, 2015, a University System of Georgia employee will be eligible to retire with University System of Georgia retiree benefits if he/she meets one of the following three conditions at the time of his/her separation from employment:~~

- ~~1. An employee must have attained age 60 and have 10 years of service established with a state sponsored retirement plan, and the last year of service must be in a fully benefitted position with the University System of Georgia; or~~
- ~~2. An employee must have at least 25 total years of service established with a state of Georgia sponsored retirement plan and have eligibility to retire under that plan and the last year of service must be in a fully benefitted position with the University System of Georgia. An early pension benefit penalty will apply to an individual who elects to participate in the Teachers Retirement System of Georgia, or in the Employees Retirement System, if he/she decides to retire with between 25 and 30 years of benefitted service, prior to attaining age 60; or~~
- ~~3. An employee must be deemed to be totally and permanently disabled, as documented through the receipt of disability benefits from Social Security, the Teachers Retirement System of Georgia, or the Employees Retirement System, and have 10 years of service established with a state of Georgia sponsored retirement plan.~~

Effective November 1, 2002, to be eligible for retirement with benefits from the USG, an employee must meet one of the following four conditions at the time of his or her separation from employment, regardless of the retirement plan elected by the employee:

1. An employee must have been employed by the USG for the last ten years in a regular, benefitted position and have attained age 60;
2. An employee must have at least 25 total years of benefitted service established with a State of Georgia sponsored retirement plan, of which the last five years of employment must have been continuous and with the USG. An early pension benefit penalty will apply to an individual who elects to participate in TRS or ERS if he or she decides to retire with between 25 and 30 years of benefitted service, prior to attaining age 60;
3. An employee must have at least 30 total years of benefitted service established with a State of Georgia sponsored retirement plan, of which the last five years must have been continuous and with the USG; or,
4. An employee must be deemed to be totally and permanently disabled, as documented through the receipt of disability benefits from Social Security or from TRS following ten years of continuous service to the USG in a regular, benefitted position.

After completing their academic contract in the year that represents completion of their 10th or 25th year of employment, a faculty member will be considered service eligible for retirement if they meet the other requirements for health and retirement plan participation.

Upon meeting one of the above conditions, an employee will be eligible for University System of Georgia retiree benefits upon retirement. An employee must be enrolled in the benefits coverage at the time of retirement or disability to be eligible to continue coverage in retirement. For employees hired on or after January 1, 2013, the employer contribution for healthcare will be based on years of service with the University System of Georgia. An individual who has retired from another state of Georgia sponsored retirement plan may not count such retirement service toward meeting the eligibility criteria for retirement from the University System of Georgia (Board of Regents Minutes, August 2015).

The University System does not guarantee a retirement allowance to any retiring faculty member with fewer than 10 years of service, but credit for military service and service in other systems can be purchased under specific conditions. A complete description of this program is available in the Human Resources Department.

Regular, limited-term faculty (visiting or temporary) and/or part-time employees who are not eligible for Teachers Retirement System of Georgia or the Regents Retirement Plan must participate in the Georgia Defined Contribution Plan (GDGP). This contribution is refundable to the member in a lump sum upon termination of employment.

321.05 Emeritus/a Policy

Purpose

The purpose of the Emeritus/a Policy is to outline the process for faculty and/or administrative officers to apply for emeritus/a status and to define the rights and privileges associated with this title. Emeritus/a status is granted to encourage continued association with the University for the purposes of university service, instruction, and scholarly investigation.

Policy

The Emeritus/a title is an honorary title awarded to full-time faculty and/or administrative officers who, at the time of retirement, had 10 or more years of honorable and distinguished University System of Georgia service. In accordance with Board of Regents policy (*Board of Regents Policy Manual, § 2.11*), only the president can confer the title of emeritus/a. The title of president emeritus/a can only be conferred by the Board of Regents upon the recommendation of the Chancellor (Board of Regents Minutes, January 2009). A faculty member and/or administrative officer must have met the length of service requirement prior to beginning a phased-in retirement to be eligible for emeritus/a status. An application for emeritus/a status must follow the procedures outlined below and must be submitted either during the final academic/fiscal year of employment or no later than one year after the date of retirement.

The bestowal of the emeritus/a title is a privilege, not a right, and requires a two-step process: (1) a completed and approved Application for Emeritus/a Status; and (2) a completed Emeriti Designation Packet, which officially confers the emeritus/a title effective immediately (if the individual is already retired) or upon retirement.

Nomination Criteria

The criteria used in the selection of retired(ing) faculty members and/or administrators for this honor shall include, but not be limited to, professional recognition in one or more of the following areas:

- excellence and/or innovation;
- **University or college** recognition, awards, honors;
- professional association recognition, awards, honors;
- community and/or professional service contributions, recognition, awards, honors;
- a consistent record of quality performance as demonstrated by one or more of the following:
 - a) a substantive record of achievement commensurate with national and international standards within the specific discipline;
 - b) a recognized record of outstanding teaching, educational, or employment field contributions; and/or
 - c) clear evidence of service to the University beyond normal expectations.

Benefits/Privileges/Recognition

1. Invitation to participate in public ceremonies of the University, including commencement, open houses, and selected university functions.
2. Invitation to certain departmental, college, and university events.
3. Complimentary copies of university publications.
4. Inclusion in the faculty/administrator listing on the university emeriti webpage (<http://jobs.georgiasouthern.edu/about/emeritus/>).
5. Inclusion in the Commencement bulletin immediately following awarding of emeritus/a title.

6. Certificate with name and emeritus/a rank.
7. Eligibility to enroll and attend classes for free, subject to space availability and approval of the instructor.
8. Upon recommendation of the department chair and approval of the dean and **the Provost and Vice President for Academic Affairs**, eligibility to work on sponsored grants, including serving as principal investigator or co-investigator.
9. Entitlement to use official university stationery and other departmental office privileges for the purposes of university service.
10. Eligibility to serve on doctoral dissertation or project committees, as appropriate.
11. Emeritus/a faculty members and administrative officers are entitled to all benefits the University grants to retired faculty and staff members as follows.
 - Free parking **hang tag**
 - Georgia Southern University email account
 - Georgia Southern University ID
 - Library privileges
 - Reduced RAC membership—½ price
 - Bookstore discount
 - Retiree health benefits

Procedure

- The immediate supervisor of the unit in which the candidate held his/her full-time appointment determines whether a faculty member and/or administrative officer should be recommended for the emeritus/a title and, if so, initiates the Application for Emeritus/a Status. Requests should include a letter of recommendation that stipulates the individual's qualification for emeritus/a status based upon the nomination criteria identified above.

Spring applications for the awarding of emeritus/a titles are due in the Provost's Office no later than February 15th. Summer/fall applications for the awarding of emeritus/a titles are due in the Provost's Office no later than September 15th.

- The completed application is submitted to the next higher level for review and endorsement, culminating with the provost and vice president for academic affairs' review and endorsement, and the president's final decision.
- If the application is approved by the president, the retiring faculty member and/or administrative officer is sent a letter from the Provost's Office, on behalf of the president, awarding the title of emeritus/a.
- Upon receipt of a copy of this letter, department chairs or unit heads complete the Emeriti Designation Packet, which consists of the Emeritus/a Designation Form, a brief bio on the emeritus/a candidate, the candidate's curriculum vitae, and a completed Personnel Action Form officially awarding the title of emeritus/a. Emeriti Designation Packets are due to the Provost's Office no later than March 1st (for spring applications) and October 1st (for summer/fall applications).