

Voluntary Phased Retirement Program Frequently Asked Questions (FAQs)

What is the purpose of the Voluntary Phased Retirement Program for faculty?

The Program is designed to provide eligible faculty members a transition pathway from their regular full-time role to a part-time role to retirement, while preserving healthcare benefits at a full-time contribution rate, throughout their university employment.

What is the duration of the Voluntary Phased Retirement Program?

The duration of the Program is for a maximum of two (2) consecutive years. A typical arrangement is designed to transition faculty from their current full-time (1.0 FTE) status to three-quarter time (0.75 FTE) to half-time (0.50 FTE) to retirement.

Can a different arrangement of FTE status be made to transition to retirement?

Yes. Other reduced status arrangements (e.g., 0.25 FTE) may be considered and approved.

Can I transition to retirement in less than 2 years?

Yes. The transition to retirement may be reduced to less than two (2) consecutive years, when both faculty member and Provost agrees.

Can I rescind my Voluntary Phased Retirement Agreement Form, after it's been approved?

No. Once the faculty member's Agreement Form is approved, their retirement is irrevocable.

Once my Agreement Form for the Voluntary Phased Retirement Program is approved, can my transition to retirement be modified?

Yes. By mutual agreement between the faculty member and the Provost, the Voluntary Phased Retirement can be modified prior to the specified date of retirement or by allowing the eligible faculty member to take full retirement at an earlier date. However, once approved, the final retirement date cannot be moved to a later date.

What are the eligibility requirements for the Voluntary Phased Retirement Program?

Eligible faculty members may elect to participate in this Voluntary Phased Retirement Program if they are currently full-time and will meet the following criteria by the end of the phased retirement duration:

- Have ten (10) years of full-time service at Cleveland State University, and
- Are 65 years of age or have 34 years of eligible service.

What does 34 years of eligible service mean?

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34 years of eligible service can either be at CSU or within the state retirement system, which is an eligibility for retirement.

What is the rationale behind the eligibility requirements?

The eligibility requirements were designed to ensure the faculty member is eligible to retire under both retirement plans offered at the University.

If I'm interested in the Voluntary Phased Retirement Program, who should I speak with first?

Faculty should first speak with their Department Chair or School Director. Then the Chair or School Director or faculty member should inform their Dean.

If I apply for the Voluntary Phased Retirement Program, will I definitely be approved?

Applications will be reviewed and approved based on academic needs in the unit. Applications will not be arbitrarily denied. Administration will make every effort to reach an agreement with the faculty member that is suitable for both the unit and the faculty member.

What is the deadline for the Voluntary Phased Retirement Agreement Form to be submitted?

Faculty wishing to join the Program should submit their Agreement Form by September 15th of the respective year. For the 2024-25 academic year, the deadline to submit an Agreement Form is January 19, 2024.

Can I still retire without participating in the Voluntary Phased Retirement Program?

Yes. Faculty may still choose to transition directly to retirement without participating in the Program.

Is my retirement under the Voluntary Phased Retirement Program calculated any differently than if I were to retire if I didn't participate in the Program?

No. Those eligible for the Voluntary Phased Retirement Program are those who meet, or will meet, the eligibility requirements in the Administrative Guidelines at their retirement date. Those enrolled in the STRS defined benefit (DB) plan should take into consideration that the final average salary used to determine their pension benefit is based on your five (5) highest years of salary.

Will I continue to be represented by AAUP if I participate in the Voluntary Phased Retirement Program?

Yes. Faculty enrolled in the Program will continue to be represented by the AAUP bargaining unit.

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Once I'm approved for the Voluntary Phased Retirement Program, can I apply for Outside Employment?

Yes. You can apply for Outside Employment through the normal Outside Employment approval process as outlined in the CBA, Article 22.

How will contractual salary increases be handled if I were to participate in the Voluntary Phased Retirement Program?

All negotiated increases will apply, as stipulated in the union contract the University has with AAUP.

Can I teach during the summer months if I participate in the Voluntary Phased Retirement Program?

Faculty enrolled in the Program will be allowed to teach during the summer, based on university scheduling needs. Faculty will still be paid the AAUP summer rate for teaching.

What happens to my annual accrued sick time if I participate in the Voluntary Phased Retirement Program?

Faculty enrolled in the Program will continue to accrue sick time on a prorated basis based on their FTE. When the faculty member retires after completing the Voluntary Phased Retirement Program, they can apply for the sick time payout per university policy and guidelines.

What happens if I need to take a medical leave of absence during the Phased Retirement duration?

Requests for medical leaves or FMLA will be handled through the normal approval process through Human Resources. Eligibility for medical leaves and FMLA is based on FTE.

Will I be able to take a personal/ non-medical leave of absence or go on sabbatical?

Faculty enrolled in the Program will not be eligible for sabbatical, per the AAUP collective bargaining agreement, which requires faculty to be full-time to be eligible for sabbatical. Requests for personal/non-medical leaves of absence will be handled through the normal approval process outlined in the Faculty Personnel Policies.

Who should I reach out to with additional questions?

Questions about this Program can be sent to Danielle Ruiz, Director of Faculty Affairs (d.ruiz@csuohio.edu).