

College of Forestry 1039 Post-Retirement Appointment Policy
Working Draft 6.4.09...pending OSU approval

One tool available for the College of Forestry to use in resolving our financial challenge is to encourage retirement of faculty [including professional faculty] as a means to reduce expenditures. In some cases, it may be advantageous to rehire the retirees on a part-time basis to cover essential duties that must be continued.

There are a variety of considerations for retiring and accepting a 1039 appointment, officially known as an Academic Wage (Returning Retiree) appointment. This memorandum seeks to answer questions and outline the conditions under which the College of Forestry will authorize 1039 appointments. The purpose of this policy is to provide information to employees about post retirement options to continue working. This will apply most commonly to tenured faculty who are prepared to relinquish tenure, retire, and then return to work part time for some defined period of time. However, the College is open to discussing post-retirement employment with any faculty member where there may be a mutual benefit to the employee and the College.

Who is eligible?

- Anyone who meets minimum retirement criteria for respective retirement plans [PERS, ORP, federal].
- 1039 appointments are offered at the discretion of the Department and the College. Appointments must serve the needs of the College and are not guaranteed.
- If tenured, tenure must be relinquished to qualify for a 1039 appointment in retirement.

How will duties be determined?

- Duties will be negotiated with the respective department head or other support unit supervisor, and approved by the Dean to best meet Department and College needs. Position Descriptions will be updated to reflect expected duties. Post-retirement assignments will be generally consistent with pre-retirement skills and experience.

How long can I work?

- Appointments will normally be renewed on an annual basis, and may be extended for up to 3 years at the discretion of the College.
- Appointments may be renewed beyond the third year upon recommendation of the department head and approval by Academic Affairs.
- Appointments may be ended upon mutual agreement, or failure to perform duties as outlined.

How will I be paid?

- Annual salary rates at the time of retirement will normally apply to the 1039, unless the duties and responsibilities are substantially less from those at the time of retirement.
- Appointments may be based on an hourly or salary compensation basis.

Is there flexibility in the hours worked?

- Any combination of FTE and months employed is possible as long as total hours worked in a calendar year are less than 1039 hours, upon approval of the department head.
- 1039 hours is the maximum hours that can be worked in a year; fewer hours are possible if agreeable to the department and College. For example, one might work at a 0.1 FTE with the goal to earn money to offset costs of medical insurance.
- For PERS hours-worked calculations, the 1039 hours are totaled over a calendar year.
- Under some circumstances the distribution of payment for completed work over a year may be negotiated with the department head.

Will I be eligible for any benefits while on the 1039?

- A 1039 Appointment at 0.50 FTE in any month continues to earn PEBB benefits for the month.
- If working at 0.50 and earning PEBB benefits then in December (assuming appointment started the previous January) the appointment must drop below 0.50 to satisfy PERS that you worked less than 1039 hours. COBRA coverage can be purchased for that single month.
- Benefit options for retirees reappointed at less than 0.50 FTE can be reviewed at <http://oregonstate.edu/admin/hr/retireop.pdf>
- On a 1039 Appointment there are no additional contributions to PERS.
- Retirees may continue to have deductions taken for the Oregon Savings Growth Plan, and the Tax-Deferred Investment Program.

What if I am a Federal Employee?

- Employees with Federal retirement have different considerations and should consult with HR Coordinator for specifics.

Can I carryover annual leave and sick leave when I officially retire?

- Retirees will be paid out their accrued, unused vacation (up to 180 hours) at the time of retirement. Retirees working at 0.50 FTE will earn prorated Annual Leave.
- Retirees lose accumulated sick leave upon retirement. Retirees working at 0.50 will earn prorated Sick Leave.

How do I pursue a 1039 appointment?

- Confirm eligibility for retirement with HR or with retirement plan staff.
- Visit with your supervisor. In most cases that will be a department head.
- Sign letter of agreement that is endorsed by your supervisor and Dean.

Last revised June 4, 2009