

Pre-Retirement Recall Guidelines for Faculty Recalled for Post-Retirement Teaching

Campus administrators may enter a pre-retirement agreement with a faculty member age 60 (sixty) or older for a recall to service after retirement.

Timing and Duration of Appointment: By agreement between campus administration and the faculty member, the recall period may be up to three academic years, subject to annual renewal after the agreed initial period. Retirement plan regulations require that there generally be a break in service of at least 90 (ninety) days between the retirement date and the date of the recall appointment start date. However, in no case may the recall date be earlier than 30 (thirty) days following the retirement date.

Compensation: In general, the recall rate for academic-year appointees will be 1/9th of the base salary at the time of retirement per quarter course or 1/6th of the base salary per semester course, not to exceed the current salary rate for Professor, Step VII. Fiscal-year salaries should be converted to the academic-year equivalent salary. Campus administrators and faculty may negotiate a higher or lower salary rate, as appropriate to the nature of the course, to reflect specific needs. The base salary is defined for the purposes of these guidelines as the faculty member's academic year (nine-month) salary or fiscal year (twelve-month) salary at the time of retirement augmented by any subsequent range adjustments. Merit and promotion increases are not granted after retirement.

Appointment and Space Assignment: The recall appointment effort may not exceed 46% (forty-six percent) time. However, due to potential Medicare complications, recall appointments will generally be 43% (forty-three percent) time or less. Assignment of office space is subject to the agreement reached between campus administrators and the faculty member. Recall for teaching appointments will not normally include any commitment of research space.

Benefits: Recalled faculty may contribute to the 403(b) Plan and 457(b) Plan. Health benefits are determined by the terms of the recall appointment. Since eligibility for benefits is a critical and complex issue, recall appointees should consult with the campus Benefits Office about how the recall appointment may affect their benefits eligibility. See the Returning to UC Employment After Retirement Factsheet for further information available at:
http://atyourservice.ucop.edu/forms_pubs/checklists_factsheets/returntowork.pdf.

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UCRP Reappointment Guidelines for Rehired Retirees

This memo is in response to inquiries on how the change in the University of California Retirement Plan (UCRP) Normal Retirement Date affects the UCRP Guidelines for Rehire of UC Retirees. UCRP recently was amended to change the Normal Retirement Date to age 60 with 5 years of Service Credit, to support the University's ability to arrange recall appointments, especially faculty who would fill limited teaching assignments.

As background, the Internal Revenue Service (IRS) defines Normal Retirement Date as the date specified by the plan when a member's right to benefits is nonforfeitable. Arrangements made for post-retirement employment before individuals reach the plan's normal retirement date could disqualify the pension plan if the IRS believes there has not been a bona fide termination of employment. Plan disqualification would result in immediate taxation to members, based on the value of a member's accrued benefit in UCRP at the time of disqualification.

The current UCRP Guidelines for Rehired Retirees (copy attached) continue to apply to all rehired retirees regardless of age, including the requirement of a 30-day minimum break in service. However, due to the change in the UCRP Normal Retirement Date, discussions about reemployment may now begin before separation or retirement if a Member is age 60 and has at least 5 years of Service Credit. (The Guidelines and related information are available on the Internet at [http://exchange.ucop.edu/documents/UCRP Waiver for Rehired Retirees/](http://exchange.ucop.edu/documents/UCRP%20Waiver%20for%20Rehired%20Retirees/)).

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