



POLICY & PROCEDURE DOCUMENT

NUMBER: 0.6900
DIVISION: University Policy
TITLE: Faculty Transitional Retirement Program
DATE: January 26, 1989
REVISED: July 24, 2015; May 7, 2018; December 13, 2019
REVIEWED: September 17, 2021
Policy for: Full-time Faculty
Authorized By: WKU Board of Regents

I. Purpose and Scope

The Faculty Transitional Retirement Program (TRP) permits the re-employment on a special part-time, time-limited basis of faculty members who retire from full-time service.

II. Policy

A. Eligibility

1. Faculty members who retire from full-time service at WKU are eligible to request to participate in the Transitional Retirement Program (TRP).
2. Faculty members achieving retirement status and separating from the university under the Teachers' Retirement System of Kentucky (TRS) **on or after January 1, 2020** are not eligible to participate in the Transitional Retirement Program (TRP) due to restrictions around the re-employment of retirees as mandated by the Teachers' Retirement System of Kentucky (TRS).

B. Participation and Compensation

1. Faculty accepted in the Transitional Retirement Program (TRP) may be offered the opportunity to teach a maximum of twelve (12) semester hours, or work in a part-time administrative (non-teaching) capacity per the following guidelines:
 - a. Faculty accepted in the Transitional Retirement Program (TRP) **on or before January 1, 2019** will be placed in a special part-time faculty category for a maximum period of up to five fiscal years.
 1. For each credit hour taught, compensation shall be at a rate of one-twelfth of 37.5 percent of the faculty member's nine-month base salary immediately prior to participation in the Transitional Retirement Program (TRP).
 2. Faculty members achieving retirement status and separating from the university under the Teachers' Retirement System of Kentucky (TRS) must work directly with the Department of Human Resources to ensure compliance with the TRS one-hundred (100) days requirement, as applicable.
 - b. Faculty accepted in the Transitional Retirement Program (TRP) **between January 2, 2019 and December 31, 2019** will be placed in a special part-time faculty category for up to two fiscal years with an option for a third year based on the needs of the department/school, college, and the university.
 1. For each credit hour taught, compensation shall be at a rate of one-twelfth of 37.5 percent of the faculty member's nine-month base salary immediately prior to participation in the Transitional Retirement Program (TRP).
 2. Faculty members achieving retirement status and separating from the university under the Teachers' Retirement System of Kentucky (TRS) must work directly with the Department of Human Resources to ensure compliance with the TRS one-hundred (100) days requirement, as applicable.
 - c. Faculty accepted in the Transitional Retirement Program (TRP) **on or after January 1, 2020** will be placed in a special part-time faculty category for one fiscal year based on the needs of the department/school, college, and the university.
 1. For each credit hour taught, compensation shall be at a rate of one-twelfth of 50 percent of the faculty member's nine-month base salary immediately prior to participation in the Transitional Retirement Program (TRP).
 2. Faculty members achieving retirement status and separating from the university under the Teachers' Retirement System of Kentucky (TRS) on or after January 1, 2020 are not eligible to participate in the Faculty Transitional Retirement Program (TRP) due to restrictions around the re-employment of retirees as mandated by the Teachers' Retirement System (TRS). See Section IV of this policy for additional details.

C. Benefits and Retirement

1. During participation in the Transitional Retirement Program (TRP) the faculty member will receive, in addition to the aforementioned salary, selected benefits as administered through the Department of Human Resources.
2. At the conclusion of the eligible part-time employment under the Transitional Retirement Program (TRP) as specified, participating faculty will attain fully retired status and will be separated from employment.

III. Procedure

- A. Faculty interested in participating in the Transitional Retirement Program (TRP) shall make a written request to the applicable department head/chair or director of the department/school, who will forward the request along with his/her recommendation to the dean of the college.
- B. Acceptance into the Transitional Retirement Program (TRP) is at the discretion of the dean and shall be based on the needs of the department/school, college, and the university.
- C. The dean shall notify the faculty member, department head/chair or director, Provost (or designee) and Department of Human Resources in writing of his/her decision.
 1. Letters accepting a faculty member into the Transitional Retirement Program (TRP) must include the dates of participation, compensation and workload expectations.

IV. Reasons for Revision

July, 2015

Policy revised to include faculty who achieve retirement status and separate from the university under the 403(b) retirement program.

May, 2018

Policy revised to adjust participation in the Transitional Retirement Program (TRP) for up to two years with an option for a third year.

December 2019

Policy revised to accommodate changes to the Teacher's Retirement System (TRS), adjust participation in the Transitional Retirement Program (TRP) for up to one year and increase the compensation rate.

On September 27, 2019, Western Kentucky University received notice from the Teachers' Retirement System of Kentucky (TRS) concerning re-employment of faculty who separate from the university under the Teachers' Retirement System of Kentucky (TRS). The new provisions are effective January 1, 2020 and are as follows:

- Breaks in service between retirement and re-employment will be required of all employers, including universities.

- A three month break in service is required if a retiree returns to work for the same employer part-time OR a “different” employer on a full-time basis. A twelve month break is required if returning to the same employer full-time.
- The break in service starts with the retirement effective date (not the last day of work).
- Retirees returning to work AND employers who hire them must both sign a statement that there was no prearranged agreement for re-employment.

V. Related Policies

4.6002 – Employee Benefits Eligibility

1.1035 – Faculty Emeritus Status