

MONTANA BOARD OF REGENTS OF HIGHER EDUCATION

Policy and Procedures Manual

SUBJECT: PERSONNEL

Policy 712.1 – Post-Retirement Employment

Adopted: January 30, 1984; Revised: May 28, 2010 May 18, 2023

I. Preamble

~~The Board of Regents of the Montana University System (MUS) supports faculty and professional staff development and encourages practices within the system which contribute to that end. A post-retirement employment policy is an option which serves the campus, its faculty, professional staff and students. Such a program provides an opportunity for experienced and committed members of the higher education community to continue their professional relationship with the campus even though they have chosen partial retirement status.~~

~~The guidelines in this policy are provided as a basis for progressive action by the campuses of the MUS. It is the desire of the Board of Regents that each campus implement a program that provides for post-retirement employment when it serves the needs and interests of the individual and the institution. Such arrangements are to be designed to continue the service of the individual as an active member of the professional campus community.~~

The Board of Regents supports the strategic use of post-retirement employment agreements with contract faculty or contract professional and administrative personnel when the campus executive officer and the commissioner view the agreement as an efficient and effective means for serving students and the public.

II. Board policy

~~Any campus of the Montana University System may enter into a post-retirement employment agreement with any faculty member or regent contract employee, or MUS contract employee in accordance with the terms of this policy. The purpose of establishing a post-retirement employment policy is to increase the opportunities for individual faculty members and Regent contract employees to change their employment status to the mutual advantage of the individual and the unit where the individual is employed.~~

The policy on post-retirement employment is designed to provide guidelines for developing a written contract which is consistent with state law, state retirement regulations, employee group health insurance considerations, and board policies. The provisions of the contract should be such that both parties can reasonably be expected to fulfill obligations contained therein and be consistent with the traditional relationships between a faculty member and his or her campus.

The administration of the campus ~~in question~~ has the responsibility for determining if it is feasible to ~~work out draft~~ an agreement with the individual faculty member or ~~Regent~~ contract employee which is beneficial to the campus. The written post-retirement contract ~~or letter of appointment~~ shall be subject to the review and approval of the commissioner of higher education.

III. Procedures

~~Upon the approval of the post-retirement contract by the contract employee and the commissioner of higher education, the contract employee must resign his or her position. Thereafter, the contract employee is responsible for applying to the appropriate retirement system if he or she wishes to obtain retirement benefits. Tenure terminates when this resignation becomes effective.~~

~~The public retirement provisions regarding employees' retirement are governed by the Teachers' Retirement System (TRS) and the Public Employees Retirement System (PERS).~~

Notification of Employer

MONTANA BOARD OF REGENTS OF HIGHER EDUCATION

Policy and Procedures Manual

SUBJECT: PERSONNEL

Policy 712.1 – Post-Retirement Employment

Adopted: January 30, 1984; Revised: May 28, 2010 May 18, 2023

~~The contract employee must reach an agreement with the campus administration at least six (6) months prior to retirement and request post-retirement employment. The campus administration may waive the six-month notification requirement. This oral understanding must lead to a written contract which is reviewed and approved by the commissioner before a change in employment status becomes effective. For individuals covered by a collective bargaining agreement, in the absence of a union agreement that provides for individual negotiation of post-retirement contracts, no such negotiations may take place until the individual's retirement is effective.~~

Any offer or acceptance of post-retirement employment under this policy may not occur until after the employee has retired. Retirement program regulations and employee group health insurance considerations may influence whether or when the employer chooses to extend a post-retirement employment offer. In the case of a retired tenured faculty member, tenure terminates upon initial retirement and is not retained in any post-retirement employment capacity.

Terms and Conditions

- A. The term of a post-retirement agreement shall be determined on an individual basis. The individual contract will describe the term of the intended appointment, normally for a duration of a semester or academic year, but in any case not to exceed three years, ~~and, in~~ In the case of a faculty member's contract, the post-retirement appointment shall be subject to Regents' Policy 710.2.1 as if the contract employee were a tenured faculty member with zero (0) years of seniority.
- B. The contract for post-retirement employment can include any one semester, summer session, or be prorated over any part of the fiscal year. This period of employment within the year may be changed annually by mutual agreement.
- C. The faculty member shall be subject to at least one performance evaluation process per contract term. In other regards, for all post-retirement contract employees the evaluation process shall be consistent with the unit's normal evaluation process except that, whenever special conditions and criteria are to be applied, such criteria will be spelled out as part of the employment contract of the employee.
- D. There is no guaranteed contract renewal. All post-retirement contract agreements automatically expire at the end of the term of the contract. However, post-retirement agreements may be renewed at the discretion of the campus administration with the approval of the commissioner of higher education depending upon the programmatic needs of the campus and the expertise of the individual employee. ~~An employee must notify the campus administration in writing at least six (6) months prior to the expiration of the post-retirement agreement that he or she desires to negotiate a new agreement. The campus administration may waive the notification requirement.~~
- E. The ~~maximum~~ rate of pay ~~or~~ and term of employment shall be in accordance with ~~the any~~ appropriate Public Retirement System state regulations, the nature of work to be performed, and pay interrelationships in the employing department.

Termination

An employee may be terminated for cause during the period of post-retirement employment pursuant to Regents' Policy 710.2.2.

History:

MONTANA BOARD OF REGENTS OF HIGHER EDUCATION
Policy and Procedures Manual

SUBJECT: PERSONNEL

Policy 712.1 – Post-Retirement Employment

Adopted: January 30, 1984; Revised: May 28, 2010 May 18, 2023

ITEM 41-003-R0973, Post-retirement employment; Montana University System (Revised), January 30, 1984 as amended Aug. 1, 1986, September 14, 1989, November 18, 1999 (ITEM 104-103-R0999); ITEM 147-103-R0510, revised § II and Terms and Conditions § D.