

**GEN 3.B.21** [*recommended Handbook placement*]  
**UW Oshkosh Policy on Post-Retirement Employment**

The purpose of this policy is to afford the University the opportunity to identify appropriate and necessary skill sets and provide access to campus positions to the broader community while balancing the needs of the organization.

This policy establishes the parameters for hiring retired university employees. All hires of retired university employees must also comply with the requirements of state law (ETF 10.08, Wisconsin Administrative Code). Retired university employees hired through a competitive process are not subject to this policy.

To ensure that there is not even the appearance of noncompliance with ETF rules, **contracts to rehire any individuals previously employed at any institution in the UW System should not be discussed, negotiated, or entered into prior to or during the required 30 day break in service.** Any contracts to rehire previously employed persons should be reviewed and approved centrally by UW Oshkosh Human Resources.

- (1) The employment of retired university employees is intended to address short-term (fixed or limited term) needs of the university and is not to be used as a substitute for hiring on-going employees. Consequently, the appointment period for a retired university employee generally cannot exceed one year. Those retired university employees hired through a competitive search are not subject to this restriction.
- (2) The hiring of a retired university employee is permitted only in specific circumstances. The dean/director or designee and appropriate Vice Chancellor must approve all appointments, in advance of the offer of reemployment. Most of these circumstances are listed below.
  - (a) The individual is needed on an interim basis while recruiting for a permanent employee or while a decision about the necessity of, or financial support for, the position is completed.
  - (b) The individual's expertise and experience are needed for a specific project.
  - (c) The individual is needed to teach classes when it is not possible to hire a faculty member.
  - (d) The individual's salary is fully supported by state funds.
  - (e) Emeriti can be hired to fill teaching, research and other roles when other resources are not available, or the hire is due to the unique aspects of a specific role.
  - (f) The individual is hired as a Limited Term Employee (LTE) for specific events or projects in which the appointment adheres to the UW Oshkosh LTE policy.
  - (g) Other exceptional circumstances exist and can be documented.

Two important considerations must be noted. First, this policy does not apply to individuals receiving retirement benefits from entities other than the State of Wisconsin WRS, for example, military retirement or corporate retirement plans. Second, this policy does not apply to individuals seeking state government employment through a competitive recruitment and selection process available to all qualified individuals.

In keeping with our institutional mission of teaching and placing the most effective facilitator in the classroom, greater flexibility in the rehire of individuals returning to instructional roles in the University will be granted.

- (3) Retired university employees may be hired into positions similar to those from which they retired without open recruitment with the exception of classified permanent or project positions. Classified permanent or project positions require annuitants to be hired through a competitive

civil service process. Hiring retired university employees into substantially different positions requires that university recruitment policies be followed.

- (4) Continuation beyond one year requires the approval of the division Vice Chancellor and the Vice Chancellor for Administrative Services or designee, in advance of the offer of reemployment.

Questions about this policy should be directed to the Office of Human Resources for classified positions and unclassified positions.

For purposes of this policy, "retired university employees" refers to those individuals who retired from UW Oshkosh and are continuing their annuity during the period of reemployment. This policy does not apply to retirees who stop their annuity and return to WRS participation during the period of reemployment.

### **Procedures for Hiring Retired UW Oshkosh Employees**

#### (1) Application of Policy to Rehired Annuitants

- (a) *Classified Permanent or Project Employees*: The policy does not apply to a retired UW Oshkosh employee who was hired into a classified permanent or project position.
- (b) *Academic staff (including retired faculty hired into Professor Emeritus titles)*: The policy does not apply to current rehired annuitants until they reach the end of their current appointment. The policy, and procedures below, will apply for reappointment beyond the current end date.
- (c) *Classified LTEs*: Since LTEs do not have appointment end dates, the appointment end date for current LTEs is deemed to be one year from the effective date of the policy: (insert date). The policy, and procedures below, will apply to reappointment beyond the end date.
- (d) *Limited appointees*: Limited appointees, who serve at the pleasure of the appointing authority, do not generally have an end date. If a current limited appointee who is a rehired annuitant has an end date, the policy will apply to reappointment beyond the end date. If there is no end date, the end date is deemed to be one year from the effective date of the policy: (insert date). The policy, and procedures below, will apply to reappointment beyond the end date.
- (e) *Guidelines on Wages and Salaries*: Wages for rehiring retired UW Oshkosh employees will be set at a base salary not higher than the salary at the time retirement. The base salary will be prorated based on the percentage of time the employee is being hired to work. Exceptions to this guideline must be submitted to the Director of Human Resources, Director of Equity and Affirmative Action and the Assistant Vice Chancellor for Faculty and Academic Staff Affairs as well as appropriate Vice Chancellor for consideration and approval.

#### (2) Approval Procedures for Hiring and Reappointing Retired UW Oshkosh Employees

- (a) *Initial Hire of Retired UW Oshkosh Employees*: Hiring a retired UW Oshkosh employee requires prior approval of the dean, director or division Vice Chancellor or designee. The hire must meet one of the circumstances in #2 of the policy. The length of the appointment cannot exceed one year without prior approval of the division Vice

Chancellor and the Vice Chancellor for Administrative Services or designee. If the initial appointment is to exceed one year, follow the procedures described in 2.B. below. Each dean/director or Vice Chancellor shall determine the approval process for his/her school/college/division and also has the responsibility to maintain records of approvals.

1. *Hiring into a position with similar responsibilities to the position from which the individual retired:* Competitive recruitment is not required unless the position is classified permanent or project. Individuals may be appointed as an LTE, Limited or academic staff depending on the responsibilities of the position. For Limited and academic staff positions, the basis for the waiver of recruitment is "Rehired Annuitant."
2. *Hiring into a position with substantially different responsibilities than the position from which the individual retired:* Competitive recruitment is required unless the nature of the position meets one of the following existing criteria for not recruiting:
  - a. LTE position
  - b. Academic Staff or Limited position which meets one of the existing criteria for a waiver of open recruitment e.g., 25 percent time or less, six weeks or fewer, replacing person on a leave of absence, etc.

Individuals on all appointments except LTE must be given appointment letters specifying the end dates of the appointment. Although Limited appointments do not generally include an end date, the appointment letter must include an expected end date not later than one year after appointment. The end date must be entered into "expected job end date" in HRS. The letter shall include the following, in addition to the standard limited appointment language: "Although, as a limited appointee you will serve at the discretion of [name of supervisor], this appointment will not extend beyond xx/xx/xx [*a date not to exceed one year from start of the appointment*]."

The policy does not apply to an individual who elects to stop his or her annuity and return to active participation in the WRS.

The policy does not apply to a retired UW Oshkosh employee who is hired into a classified permanent position through a competitive civil service process whether or not he or she has elected to stop his or her annuity.

- (b) *Reappointment Beyond One Year or an Initial Appointment Exceeding One Year:* Reappointing an individual for a second or subsequent year (or an initial appointment exceeding one year) requires the approval of the division Vice Chancellor or Vice Chancellor of Administrative Services or designee in addition to approval by the dean, director or designee. For purposes of this policy the Vice Chancellor of Administrative Services has delegated approval to the Office of Human Resources, specifically for classified positions and for unclassified positions.
- (c) *Process for Requesting Vice Chancellor Approval:*
  1. *Academic Staff and Limited Appointees:* The dean/director or designee will request approval of the reappointment or initial appointment exceeding one year. The request shall include the justification for the request. The division Vice Chancellor will make all decisions. Monitoring of outcomes will be maintained by the appropriate Vice Chancellor.

2. *Classified Project and LTE:* The dean/director or designee will send a request seeking approval of the reappointment or initial appointment exceeding one year. The request shall include the justification for the request. The division Vice Chancellor will make all decisions. Monitoring of outcomes will be maintained by the appropriate Vice Chancellor.