

Post-Retirement Appointments – updated March 2021

Extension Administration has developed the following guidelines for post-retirement appointments.

The following conditions apply:

- Whether or not a person seeks a post-retirement appointment, the decision to retire is irrevocable once executed.
- Prior to beginning a post-retirement appointment, an employee must retire.
- A three-day break in service may be required prior to starting the post-retirement appointment (e.g. the employee may be required to start the post-retirement appointment on or after the fourth day after retirement). For faculty, retirement also means giving up tenure.

NOTE: The retirement date and the beginning date of the post retirement appointment cannot be in the same pay period due to SAP restrictions. This means that for monthly employees, the retirement date and post retirement beginning date must be in different months.

- University regulations restrict appointments to one year in length, but appointments may be renewed for additional one-year periods with mutual agreement of CES and the employee.
- Approval of appointments may be dependent upon continued funding support, satisfactory job performance by the individual, consultation with the county in the case of county agents and departmental need.
- Complete the annual evaluation, and complete the annual mid-year evaluation form.
- For Agent post-retirement appointments, specific reporting requirements such as success stories, report to the people, meetings and activities, and statistics will still be required.
- Benefits changes for post-retirement appointments – no matching retirement contributions (although employees can continue to make voluntary, tax-deferred contributions); life insurance coverage ends; health insurance credit does continue as long as FTE is at least 20% (20%-70% would receive the self credit only, not dependent or spouse coverage). Refer to the following chart for additional information:
<https://www.uky.edu/hr/benefits/eligibility-for-uk-benefits>
- Appointments and renewals will not be automatic, but will be decided on a case-by-case basis by recommendation of the Dean and Provost to the Board of Trustees.
- Even though post-retirement appointments are approved for a period of one year, in times of severe budget cuts they should be viewed as less secure than regular positions.

- The ability to offer post-retirement appointments in the future could depend upon whether state and/or federal governments place any restrictions on this option.

Generally, an 80% or less appointment is planned. Specifically, the following guidelines will be used:

- For County Extension Agent positions, to still be able to cover the job responsibilities, county agent positions will be approved for an 80% appointment.
- Depending on the position, somewhat more flexibility may exist with specialist positions or shorter term positions.

The application procedure for a post-retirement appointment will require a proposal from the employee to his or her supervisor. The proposal should contain a plan that spells out the position, the percentage of time of the appointment, and a timeline indicating when it is proposed to occur. Included should be a position description that spells out job expectations that are consistent with the program needs of the county or department. **The proposal should be developed jointly by the employee and the supervisor.**

Expectations of employees with post-retirement appointments will be the same as any other employee. Counties will continue to budget for prorated salary and benefits, program support, travel, and professional development for agents. Agents will continue to submit reports, statistical information, success stories, and performance overviews. Although vacation, holiday and sick leave may not be reported through the UK SAP, agents should be accountable for anytime taken away from work. This should be in the form of an absence sheet. The salary level will be the same as in the regular position, adjusted for percentage of appointment.

Steps to be followed for Post-Retirement Appointments are:

Agents will want to communicate with their Area Extension Directors and involve them in planning the proposal. Area Extension Directors will review the proposal with the Regional Extension Director. Specialists and Associates should work with their department chair and/or assistant director (whichever is in the primary administrative role) to develop a mutually acceptable proposal. Assistant Directors should forward proposals through Extension administration; department chairs directly to the Dean's Office. Post-retirement appointments will be recommended by the Dean and Provost to the Board of Trustees. In order to allow sufficient time to secure approval for the appointment before the proposed retirement date, it is recommended that individuals seeking a post-retirement appointment start the process two to three months in advance of the effective date. Anticipating that there may be other questions, feel free to contact the Regional Extension Director. Persons who wish to consider a post-retirement appointment should also contact Le Anne Herzog in order to have their anticipated retirement benefits calculated. In addition, see Post-Retirement Guidelines, below.

Post Retirement Guidelines

The following are general guidelines to be followed:

1. A letter from the employee stating the intent to retire and the start date of retirement is to be sent to the Area Extension Director.
2. A letter requesting a post retirement position should be sent to the Area Extension Director either with the letter of retirement or after. (Post retirements need three months minimum to be processed). The letter requesting a post retirement appointment must include a start date (there must be a 3 day break in service between retirement and a post position appointment), an ending date (no more than 1 year), a description of the job duties and goals for the post retirement position and the percentage of post retirement being requested (maximum of 80%).
3. The retirement letter, the post retirement request and a letter of support from the Regional Extension Director should be sent to Director of Extension. If the Regional Extension Director and Director of Extension approve, the process continues through the Dean's Office, Provost and Board of Trustees, thus the need for a three-month window.

Here is a link to the current Board of Trustees Meetings with due dates for materials:

<http://administration.ca.uky.edu/deadlines>

Employees with federal benefits can obtain retirement estimates from [Le Anne Herzog](#). All others should contact the UK Benefits Office, 115 Scovell Hall, Lexington, KY 40506-0064, Phone: (859) 257-9519, option 3, Toll Free: (800) 999-2183, Fax: (859) 323-1095, E-mail: benefits@email.uky.edu.