Retirement/Faculty Early Retirement Program (FERP) Checklist

Retirement/FERP deadline is established 6 months before the beginning of the academic year. If you are considering retirement and plan to participate in the FERP Program starting with the 2023/2024 Academic Year (per Article 29 of the CBA) the deadline to notify the University is **February 15, 2023**.

☐ Faculty member forwards retirement and/or FERP email or written notification to President, Provost, Dean, Department Chair, and the Associate Provost for Faculty Affairs & Development. Notification should include:
- ➢ MM/DD/YY - Retirement (Effective the day before CalPERS Retirement and must be before start of new Academic Year)
- ➢ MM/DD/YY - FERP start date (Example: **Fall Term 08/17/2023**)
- ➢ Include your College and Department

☐ **Submit FERP Application**: The academic year workload of a full-time faculty member is equivalent to 30 weighted teaching units (WTUs). Since your time base in the FERP is .5, your workload will be equivalent to 15 WTUs which will be comprised of a mix of direct instructional activities and indirect activities *(i.e. office hours, advising, service, committees, department activities, mentoring, etc.).*
FERP Application form hyperlink is https://www.csusb.edu/faculty-affairs-development/docs-forms/faculty-retirement-forms.

☐ **Submit the CalPERS Application**: You need to apply for service retirement online at www.calpers.ca.gov using MyCalPERS or in person at a CalPERS office. To contact CalPERS, call (888) 225-7377 (Cal-PERS).

☐ **Clearance Process (excluding FERPs):**
The University has a clearance process which involves the return of all University property and equipment that is in your possession (including keys and library books), settlement of outstanding financial obligations (e.g., travel claims, parking fines, library fees, etc.), and termination of your campus information systems accounts (e.g., e-mail, blackboard, People Soft, etc.). The online clearance form can be accessed at https://www.csusb.edu/faculty-affairs-development. Please contact your department support staff well in advance to determine specific details.

Your CSUSB library privileges may continue as well as the use of your campus e-mail account. Please contact the Help Desk at 909-537-7677 or via email at support@csusb.edu for more information.

FERPs are <u>not</u> permitted to receive any additional CSU compensation. However, FERPs can receive Professional Development Funds (i.e. travel expenses).