

**R961-1. Purpose:** To outline the Commissioner's Office policy toward retirement of personnel.

## R961-2. References

- 2.1. Policy and Procedures [R934](#), Reduced Tuition Programs
- 2.2. Policy and Procedures [R937](#), Insurance Programs
- 2.3. Policy and Procedures [R962](#), Retirement Programs

## R961-3. Definitions

- 3.1. **"Retirement"**: the full or partial termination of regular compensated service as an employee concurrently with the initiation of the receipt of retirement benefit payments or annuities under an applicable retirement program.
- 3.2. **"Phased Retirement Program"**: an arrangement for early partial retirement, as embodied in a written contract between the Commissioner's Office and the employee.
- 3.3. **"Normal Retirement Age"**: the age contemplated by the Commissioner's Office retirement programs at which the Commissioner's Office employees are normally expected to consider retiring or to retire voluntarily either fully or on a phased retirement.

## R961-4. Policy

- 4.1. **Need for a Retirement Program:** The Commissioner's Office administration regards the establishment and impartial administration of a retirement plan, and the provision of annuities after retirement, as matters conducive to the progress and efficiency of the Commissioner's Office and of interest to personnel of the Commissioner's Office.
- 4.2. **Reasons to Require Retirement:** Commissioner's Office personnel shall not be required to retire solely because of age; provided, however, that the Commissioner's Office may require an employee to retire if (a) the employee holds a position for which age is a bona fide occupational qualification reasonably necessary to the normal operation of the Commissioner's Office, or (b) retirement is required as a disciplinary sanction for good cause.
- 4.3. **Options for Full or Partial Retirement:** Either full or partial retirement on an optional basis may be arranged, with administrative approval, prior to or after the normal retirement age.
- 4.4. **"Normal Retirement Age"**: The "normal" retirement age for Commissioner's Office personnel is 65 years, subject to paragraphs 4.2 and 4.3 above. Benefit programs for employees 65 years of age or over may be modified within the limits authorized by state and federal law.
- 4.6. **Extensions of Employment:** The hiring or extension of employment of staff personnel following full retirement may be authorized by the director of personnel for short-term (less than 30 days) employment

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<sup>1</sup> Adopted July 19, 1983; Editorially revised January 21, 2009.

when this employment is essential to the continued operation of the office. Approval will be based on the needs of the Commissioner's Office and the individual's physical status. Extensions will be approved only where continued employment is critical to the operation of the office, as, for example, where unusual skills are involved or where the skill is in short supply in the local market.

#### **R961-5. Procedures**

**5.1. Notification to Institution:** The Commissioner's Office shall notify the Benefits Office at the institution through which the employee's payroll has been handled 90 days prior to an individual's proposed retirement date to facilitate initiation of retirement plan benefit payments and other arrangements relating to retired status.

**5.2. Counseling:** Individual counseling is available through Human Resources to answer questions regarding retirement, social security, Medicare, and continuation or conversion of insurance coverage. Additionally, group preretirement training sessions are conducted as needed for staff.

#### **R961-6. Benefits for Retired Personnel**

**6.1. Employees on University of Utah Payroll:** OCHE employees paid through the University of Utah payroll system who, on or after their 60th birthday, commence full retirement after completing five years of continuous service for OCHE immediately prior to retirement will be entitled to the following benefits :

6.1.1. Retiree I.D. card with a lifetime validation free of charge.

6.1.2. Bookstore discount.

6.1.3. Use of physical education facilities.

6.1.4. Use of those Union Building facilities requiring I.D. cards, such as movies, bowling, billiards, lectures, etc.

6.1.5. Discounts on athletic and theater season tickets and travel series tickets. Also, discounts for concerts in the Special Events Center.

6.1.6. Parking with purchase of appropriate sticker.

6.1.7. Borrowing privileges at university library facilities.

6.1.8. Reduced tuition of 50% on classes taken for credit to four hours per semester.

6.1.9. Continued membership in the university credit union.

**6.2. Employees on Other USHE Institution Payrolls:** OCHE employees paid through other USHE institution payrolls should contact the institution for information about benefits for retired personnel.