

TENTATIVE AGREEMENT: UNION PACKAGE PROPOSAL #4.1
Counter to Employer's July 29, 2025 Package Proposal #4.0
Re: Phased Retirement

Summary

- **Article 16, Sec. 7, Subd. 3.A Phased Retirement Program**
 - Changes maximum length of phased retirement from six to five years.
 - Change will apply to phased retirement plans submitted on or after July 1, 2026.

- **Article 16, Section 7, Subd. 5 Limits on Access**
 - New: Two sub-paragraphs (A & B). Paragraph A applies to phased retirement applications submitted prior to July 1, 2026. Paragraph B applies to phased retirement applications submitted on or after July 1, 2026.
 - Changes in Paragraph B for phased retirement applications submitted on or after July 1, 2026, include:
 - Current limit at a college changed from 7% to 11% of the number of UFT faculty.
 - Some clarifications to terminology and/or phrasing of current “limits on access” language.
 - Exception to 50% limit is for credential field, rather than program/department. 50% limit does not apply if only one UFT faculty member holds the credential field at the college.
 - Eliminates the need for system office (as BOT designee) approval for exceptions to college-wide percentage limit. Only college president’s approval would be needed.

This TA covers only the changes indicated herein. Other proposals may be pending concerning some of these provisions, sections, and/or articles.

ARTICLE 16
SICK LEAVE LIQUIDATION AND FACULTY RETIREMENT PROVISIONS

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Section 7. Phased Retirement Program.

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Subd. 3. Terms of Program. The phased retirement agreement must meet the following terms:

- A. For plans submitted prior to July 1, 2026, a length of time no less than one (1) year and no more than six (6) years. For plans submitted on or after July 1, 2026, a length of time no less than one (1) year and no more than five (5) years.
- B. An annual workload no less than .40 FTE and no more than .80 FTE.

The level of reduction and the length of time of phased retirement may change upon mutual agreement of the faculty member and the college president. At the end of the phased retirement period the faculty member must retire from the Minnesota State Colleges and Universities system, unless circumstances give cause for the faculty member and the college president to end the phased retirement program early and the faculty member returns to full-time employment. Faculty members who are in a phased retirement program shall be counted as full-time for the purpose of meeting the hiring practices requirements contained in Article 20 of this Contract.

The calculation of workload shall be in credits for faculty who teach plus a percentage of additional days beyond the student contact time required. An example of the application of this provision would mean that a fifty percent (50%) phased retirement plan would require that the faculty member teach fifty percent (50%) of the maximum load as outlined in Article 11 and be responsible for fifty percent (50%) of the administratively assigned duty days regardless of the length of the semester.

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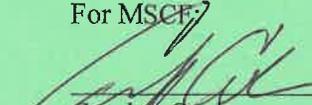
Subd. 5 Limits on Access.

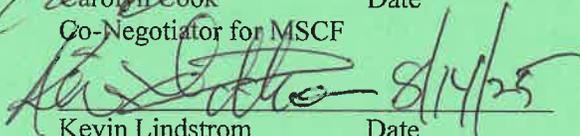
- A. This paragraph applies to phased retirement applications submitted prior to July 1, 2026. The number of faculty members at each college who will be granted this option shall be limited to seven percent (7%) of the number of unlimited full-time faculty at the college or one (1), whichever is greater. Except in single person programs/departments, no more than fifty percent (50%) of the employees in a credential field may access the phased retirement program. If more applications are received than the seven percent (7%) limit or the fifty percent (50%) department limit, the approvals shall be granted on a seniority basis, with the most senior applicants being granted first. In the event the campus limit is reached, an applicant in excess may be granted the phased retirement program if the president and the Employer agree to the request. The seven percent (7%) limit will be established each year and shall not be cumulative. The actual numbers may change based on the roster changes each year.

- B. This paragraph applies to phased retirement applications submitted on or after July 1, 2026. The number of faculty members at each college who will be granted this option shall be limited to ~~seven-eleven~~ percent (~~7%~~ 11%) of the number of unlimited full-time faculty at the college or one (1), whichever is greater. ~~Except in single person programs/departments, no~~ more than fifty percent (50%) of the unlimited full-time faculty members employees in a credential field at the college may ~~access-participate in~~ the phased retirement program in a given academic year. The fifty-percent (50%) limit shall not apply if only one (1) unlimited full-time faculty member holds the credential field at the college. If more applications are received than the ~~seven-eleven~~ percent (~~7~~11%) limit or the fifty percent (50%) ~~department-credential field~~ limit, the approvals shall be granted on a seniority basis, with the most senior applicants being granted first. In the event the ~~campus-college~~ limit is reached, an applicant(s) in excess may be granted the phased retirement program if the president or designee and the Employer agrees to the request. The ~~seven-eleven~~ percent (~~11~~7%) limit will be established each year and shall not be cumulative. The actual numbers may change based on the roster changes each year.

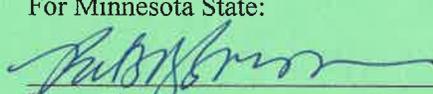
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For MSCF:

 8/14/25
 Carolyn Cook Date
 Co-Negotiator for MSCF

 8/14/25
 Kevin Lindstrom Date
 Co-Negotiator for MSCF

For Minnesota State:

 8/13/25
 Betsy Thompson Date
 Negotiator for Minnesota State

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