Policy

UNIVERSITY POLICY HR-26.00-09/26

TO: The University of West Florida Community

FROM: President Manny Diaz, Jr.

SUBJECT: Post-Retirement Volunteer Services

RESPONSIBLE OFFICE: Human Resources

I. Purpose:

This policy establishes the criteria that FRS Retirees must satisfy to render services post-retirement, along with their responsibility to adhere to the laws of the State of Florida, Board of Governors regulations, and University of West Florida ("University" or "UWF) regulations, polices, and procedures governing such services. These obligations are explicitly tailored to the individual's retirement plan.

This policy applies to all University employees who are/were participants in the Florida Retirement System ("FRS"), including those retiring from the Deferred Retirement Option Program ("DROP"), participants in the State University System Optional Retirement Plan ("SUSORP"), and any employee who has been employed by an FRS employer and are engaged in or seeking to engage in Services or Post-Retirement Volunteer Services with UWF.

II. Definitions:

FRS Retiree: An individual who has retired from an FRS covered employer through one of the methods of Retirement.

Retirement: Occurs when one of the following happens:

- An *FRS Pension Plan (FRS PP)* participant (1) separates employment from all FRS state agencies, (2) establishes a retirement date through the application process with the State, and (3) cashes or deposits their defined benefit payment. (For DROP participants, retirement is defined by the date the UWF employee separates from service.)
- An *FRS Investment Plan (FRS IP)* participant (1) separates employment from all FRS state agencies, and (2) files a request to receive a distribution or withdrawal from their defined contribution account.
- A *State University System Optional Retirement Program (SUSORP)* participant (1) separates employment from all FRS state agencies, and (2) files a request to receive a distribution or withdrawal from their defined contribution account.

Services: FRS Retiree engaging in any unpaid civic, charitable, or humanitarian activities for or on behalf of UWF.

Post-Retirement Volunteer Services: Services provided to UWF by an FRS Retiree in a limited unpaid capacity for or on behalf of UWF within the first six calendar months following Retirement with the State of Florida. Post-Retirement Volunteer Services do not constitute employment with UWF.

III. Policy:

FRS Retirees seeking authorization to provide Services must comply with all requirements and restrictions regarding State of Florida retirement benefits. No Services may be provided by a FRS Retiree who does not meet the requirements of the State of Florida.

UWF's affiliation with an FRS Retiree who provides Services or Post-Retirement Volunteer Services does not constitute UWF's verification that the FRS Retiree meets any eligibility or all legal requirements and restrictions. The FRS Retiree is required to independently confirm their ability to provide any Service and/or Post-Retirement Volunteer Service and assume all financial and other risks if it is determined the Service or Post-Retirement Volunteer Service is inconsistent with the law as interpreted or applied by the State of Florida.

A. Eligibility Criteria

FRS Retirees may participate in Post-Retirement Volunteer Services during the first six calendar months following Retirement, provided that the Post-Retirement Volunteer Services meet the following criteria:

1. Before the date of retirement, there was no agreement or understanding between UWF and the FRS Retiree to provide any Services or Post-Retirement Volunteer Services.

2. Neither UWF nor any third party may provide any form of compensation, including cash equivalents, in exchange for Services or Post-Retirement Volunteer Services.

3. Employee benefits provided to active employees, including health or life insurance benefits, may not be provided in exchange for Post-Retirement Volunteer Services. However, certain perquisites that are necessary to complete tasks associated with the Post-Retirement Volunteer Services, such as an assigned uniform or the provision of equipment, are permissible.

4. The number of volunteer hours per week, including training, is limited to no more than 20 percent of the amount of time that was expected of the FRS Retiree per week before the date of Retirement.

5. A clear distinction between the Post-Retirement Volunteer Services and the duties of an employee is required. An assessment of the totality of the previous duties and

comprehensive nature of the previous role will be considered when evaluating the Post-Retirement Volunteer Services.

6. Volunteers must maintain control of their volunteer schedule, including the number of hours volunteered and assignments for which they agree to volunteer.

7. Adequate volunteer program record keeping must be maintained by both UWF and the volunteer to document adherence to the criteria listed in this subsection. The records must be made available to appropriate administrators upon request.

B. Requirements and Other Considerations

1. Courtesy Faculty Appointment:

   a. An FRS Retiree must obtain a courtesy faculty appointment before performing any Services or Post-Retirement Services that align with teaching, research, or other services as a courtesy faculty member.

   b. All courtesy faculty appointments must comply with UWF Policy HR-27, Courtesy Faculty Appointment.

   c. An FRS Retiree performing any Services or Post-Retirement Services who does not require a courtesy faculty appointment must comply with the other requirements within this policy and UWF Policy HR-25, Volunteers.

2. Retirement Benefits: Prior to providing Services or Post-Retirement Services, an FRS Retiree should consider the following:

   a. Guidance provided by Human Resources to the covered employee preparing to receive a Retirement benefit or distribution from the State of Florida, regarding the requirements, restrictions and limitations related to providing Services or Post-Retirement Services to UWF, after taking a distribution or receiving a benefit from an FRS retirement program, such as the FRS PP, FRS IP, or the SUSORP, including DROP payout.

   b. There are consequences to the FRS Retiree and UWF by the State of Florida for violating these requirements, restrictions and limitations, including retirement fund forfeiture and other penalties.

   c. FRS Retirees shall not take any distributions or receive a benefit from an FRS retirement program that conflicts with the FRS reemployment retirement restrictions and limitations.

   d. FRS Retirees who are providing or plan to provide Services or Post-Retirement Services to UWF shall not take any distribution or receive a benefit from an FRS retirement program without first notifying UWF and receiving approval to engage in or continue the Services or Post-Retirement Services.

e. After six calendar months following a Retirement distribution from an FRS retirement program, an FRS Retiree may provide Services to UWF as a rehired employee, subject to applicable hiring requirements and policies.[1]

Approved by: _____ **Date:** 9/30/26
President Manny Diaz, Jr.

Authority: Florida BOG Regulation 1.001, University Board of Trustees Powers and Duties

Cross Ref.: § 121.091(15), Florida Statutes
UWF Policy HR-25, Volunteers
UWF Policy HR-27, Courtesy Faculty Appointment

History: Created September 2026

Last Review: September 2026

[1] These FRS reemployment restrictions and limitations do not impact participation in or distributions from UWF's voluntary pre and/or post-tax 403(b) plans or the State of Florida 457 Deferred Compensation Plan for UWF employees.