INSTRUCTIONS FOR FACULTY ASSOCIATION PHASED IN RETIREMENT PROGRAM

1. Any Faculty Association employee who is interested in this program must speak to their immediate supervisor to discuss the viability of participating in the program.
   a. The purpose of this discussion is to determine whether the department in which the person works can accommodate the employee’s request to participate in this program.
   b. The supervisor and the employee should discuss the amount of the proposed reduction by year and how that reduction will affect the productivity and effectiveness of the office.
   c. The supervisor and the employee should also determine what the department will need to do to accommodate the request: reassign tasks, streamline processes, etc.

2. After discussing the request to participate in the phased in retirement program with their supervisor, the employee must complete the “Request for Participation in the Phased In Retirement Program” form. **June 1 is the deadline to submit an application to participate in the phased in retirement program for the next academic year, which begins on September 1.** This deadline applies to any application for phased in retirement that will begin at any time during that next academic year. A decision regarding the phased in retirement request will be provided to the employee on or before June 15.

3. Once the employee has completed the form, he/she must submit the form to the supervisor. The supervisor must:
   a. Review the form for completeness, including the section entitled “proposed changes to the employee’s assignment to allow for the reduction”
   b. Sign off on the form indicating whether they approve or disapprove of the employee’s request
   c. Submit the completed form, with their recommendation, to the Vice President for review and final determination on the request
   d. With the completed form, the supervisor must include a transmittal memo to the Vice President, which includes the following information (see attached sample):
      i. Why they have approved or disapproved the employee’s request
      ii. A summary of the discussions that the supervisor has had with the employee regarding the request and the viability of that request
      iii. A plan or explanation of how the portion of the employee’s reduced workload will be absorbed by the department
      iv. If the supervisor believes that additional resources are needed to cover the reduced workload, what those resources are and include any approvals necessary (for example, if the supervisor intends to cover the employee’s reduced workload with a part-time staffer, a completed part-time request form must be submitted with the form and the transmittal memo)

4. The Vice President will review the request and all of the supporting materials provided by the supervisor and make a final determination as to whether participation in the phased in retirement program is approved.

5. The Vice President’s decision is final, but may be subject to the grievance procedure. Disputes regarding participation in this program are not subject to arbitration.
Sample Transmittal Memo

TO: (Name), Vice President, (Division)

FROM: (Supervisor Name), (Title), Department

DATE: June 2, ______

RE: Request for Phased In Retirement Program

Please see the attached Request for Participation in the Phased In Retirement Program submitted by (employee name). (Employee name) is a (employee title) in the (department), in this role he/she has the following duties and responsibilities: (describe employee’s job duties and responsibilities).

(Employee name) has requested a (insert amount of reduction in workload) as part of the phased in retirement program. The department will/will not be able to accommodate this request for the following reasons: (explain in detail how the department will accommodate the request – this should be an amplification of the information provided on the employee’s request form or if the recommendation is to deny the request, explain why the department cannot accommodate the request. Include information on how this will affect the ability of the department to fulfill its responsibilities to the College’s operations, mission, etc.)