

# Guidelines on Phased Retirement

College Guidelines on Phased-Retirement  
May 1, 1995

Upon recommendation by the Board of Regents, the Legislature, in July of 1994, adopted a phased-retirement program for implementation by institutions in the Regents system. Attached to the College's guidelines are the state guidelines for participation in the Regents voluntary phased-retirement program. Procedural guidelines, issued by the Office of Academic Affairs, are also appended. The Regents plan provides flexibility to universities, and units within them, in administering phased-retirement. In consultation with department chairs and program directors, the College Office offers the following guidelines. Our hope is that phased-retirement will mutually serve the needs of individual faculty and departments. These guidelines are intended to help faculty and departments achieve that end. The College phased-retirement guidelines seek to provide mutual benefits for professors and their departments in the College. It continues health insurance coverage for a professor while it enables departments to better plan their courses. At the same time, both the department (as a representative of the College) and the individual professor incur obligations. We attempt to outline here both the benefits and obligations for each party.

1. A faculty member, upon eligibility (i.e., age 55 or older, with at least ten years of full-time service in the Regents system), may request phased-retirement at any time, subject to the approval of the department and the College. Faculty who elect phased-retirement must retire within five years. A faculty member may opt for a maximum initial appointment of 0.75 FTE and a minimum of 0.25 FTE. These levels should be negotiated between a professor and the department.

While a routine phased-retirement might begin at 0.75 or 0.50 FTE, and then lower to 0.25 FTE over the years, there is no required pattern. The faculty member should discuss options with the department chair and agree upon the approved combination of activities for the fractional appointment. It is important to note, however, that once the reduction in appointment has been established, the appointment cannot be increased at a later time (e.g., a 0.75 FTE appointment cannot be restored to a 1.0 FTE; a 0.25 FTE appointment cannot be increased to 0.50 FTE, etc.).

2. Space constraints may require that the office assigned to the faculty member on phased retirement will not be the one the professor had formerly used; however, every effort should be made by the chair to provide an office/laboratory that is suitable for the professor in the principal arena of the department. Professors may retain for office use any computer equipment they used when they elected for phased-retirement. This is a matter that varies across departments.
3. Professors who are a member of the regular Graduate Faculty are eligible to apply for Faculty Scholarly Travel Funds through the Office of Research, Graduate Studies, and Public Service. Faculty on phased-retirement can serve on any of the Standing Committees of the College. Departmental voting rights, however, are a matter of departmental by-laws.
4. Professors who elect phased-retirement are able, subject to the constraints of the Graduate School, to direct dissertations, master's theses, and Ph.D. examining committees. There is no constraint based on level of appointment. Such professors are welcome and are expected to advise both undergraduate and graduate students, and they should also maintain regular office hours.

5. Phased-retirement professors are eligible to apply for summer teaching appointments, consistent with departmental policies. These are matters best left to negotiations between the chair and the faculty electing phased-retirement.

Additional information on phased-retirement may be obtained from the [Office of the Provost](#) or Staff Benefits.