



PHASED RETIREMENT PROGRAM FOR FULL-TIME TENURED FACULTY FAQs

1. Which faculty members are eligible for the Phased Retirement Program?

This Program is available to all full-time tenured faculty members who meet one or more of the following criteria:

1. 30 years of service at the university at any age;
2. A minimum of 20 years of service with the university and have reached the age of 60 years or older before July 1 in the first year of the phased retirement period; or
3. A minimum of 5 years of service with the university and have reached the age of 65 years or older before July 1 in the first year of the phased retirement period.

2. For applications submitted to begin in 2024, what is the maximum period of phased retirement?

For phased periods beginning July 1, 2024, the university is continuing with a modified Phased Retirement Program. Eligible faculty members may apply to participate at a minimum of 50% FTE with either a 1-year or 2-year phased period commencing July 1, 2024, with a retirement date of either June 30, 2025 or June 30, 2026.

3. When are applications for the 2024 Phased Retirement period due?

Applications for the modified Phased Retirement Program are due December 1, 2023.

4. Vacant faculty positions are subject to review by the Provost for possible reallocation. If a faculty member in my department is approved for phased retirement, what are my options as Program Director/Department Chair to replace that faculty member's workload?

The policy concerning the review of vacant positions by the Provost is unaffected by this program. However, consideration of the effect of this program on resources to address instructional and research needs will be taken into consideration. After you have reviewed the applications you receive and have examined other resources available to you to address your department's needs, you should discuss the situation with the Dean of Faculty Affairs (for undergraduate programs) or the Dean of Graduate Affairs (for graduate programs). Together

with the Provost, the Dean will examine the needs across the university. In all cases, the department will have the appropriate salary funding to pay that faculty member at their reduced salary for their phased term. The residual salary is subject to review and allocation by the Provost.

5. Can a Program Director/Department Chair deny a request?

No, a Program Director/Department Chair cannot deny a faculty member's application for the program when the faculty member notifies them of their intent to apply and develops their proposed retirement plan. The Program Director/Department Chair should identify to the Provost any concerns about the percentage of faculty who apply (especially if the number exceeds 25% of tenure track faculty in the department). The Provost will then be responsible for considering the situation and making the final decision, after consultation with the Program Director/Department Chair.

6. We are concerned about the possibility of having a large number of applications. How does the university decide the order of acceptance, if there are too many applications?

Factors to be considered by the Provost in evaluating the application and proposed retirement plan will include, but are not necessarily limited to, the following:

- the faculty member's proposed retirement date and distributed teaching load and other university service during the phased retirement period,
- the needs of the department/program, and the ability of the department/program to cover teaching assignments during the phased retirement period; and
- other applicable departmental and university financial and operational considerations.

Although there are no set limits on who or how many faculty members will be allowed to participate in the Program, the university reserves the right to limit participants or determine the terms of Program participation, as determined at the discretion of the Provost. A faculty member whose application for participation in the Program is not accepted may re-apply for participation for a subsequent academic year or may elect normal retirement or early retirement, if eligible.

7. Will faculty who are admitted to this program be eligible for "emeritus" titles?

The policies on conferring emeritus rank are unaffected by this policy. Therefore, the university will continue to use the usual process for considering this decision as in other cases where a faculty member reduces their workload and then retires. Emeritus status could be requested by the faculty at the conclusion of the phased retirement term.

8. If a faculty member who holds a named/distinguished professorship enters phased retirement, will that faculty member retain the same title and benefits to which he/she was entitled before the resignation?

If the faculty member enters phased retirement or their appointment becomes less than full-time in some other way, the faculty member's continued retention of any named/distinguished professorship will depend on the agreements for those appointments.

9. What is the definition of reduced salary for phased retirees? Does this include supplements for administrative assignments, overloads, or summer schools (or similar) payments?

The total salary will be prorated to reflect the reduced teaching load and work performed. For example, a faculty member in phased retirement at 0.5 FTE (3 units) will earn 50% of their standard salary. It does not include supplements for administrative assignments, overloads, summer school, or similar payments to which the faculty member is not legally entitled.

10. We understand that full-time administrators are not eligible. However, faculty who occupy full-time administrative or staff positions are not eligible for the Program until they vacate the administrative or staff position. To whom should the application be sent?

Any full-time administrator (e.g., Department Chair, Program Director, Dean) should first notify the relevant Dean or Provost of their interest in applying for Phased Retirement and discuss returning to faculty service on a part-time basis. At the same time, the administrator should contact the Program Director/Chair of the academic department in which he/she holds tenure to design a work plan with their academic chair. The application should be submitted to the Provost with a copy to the current administrative supervisor.

11. What if a faculty member holds a joint appointment in two academic departments?

If a faculty member holds a joint appointment, the application should be discussed with the Program Director or Department Chair of the home/base department. The funding of the position will have to be handled carefully as will the negotiations about the faculty member's part-time work plan. The chairs of the departments that share the joint appointment should work together to make the budget and work plan arrangements.

12. What type of activities can be included in a faculty member's work plan under the Phased Retirement Program?

The full range of faculty activities should be considered in these negotiations. These activities include undergraduate teaching, graduate teaching, research and creative activities, academic advising, writing of grants, publications, committee membership, presentations, participation in public service-related activities, participation in professional society-related activities, and departmental administrative activities. The percent of time an applicant will be involved in any of these activities will depend upon the level of time commitment agreed upon between the faculty member and the Program Director/Department Chair and Provost as they create the final work plan.

13. Can I teach summer school while I am in Phased Retirement?

Yes, faculty in phased retirement may teach summer courses for the standard overload compensation.

14. Am I eligible for the phased retirement program as a tenured faculty member if I am working less than a full-time schedule?

In order to be eligible for the program, you must be in full-time status (e.g., 1.0 FTE). In the event you have been authorized for less than full-time status in your current tenured faculty position, you will need to return to and work in full-time status for no less than one semester prior to entering the phased retirement program. If you are in this situation, you are advised to approach your Program Director/Department Chair and seek return to full-time status with the intent to enter phased retirement. If for whatever reason you are not ultimately accepted into the phased retirement program or choose not to enter phased retirement, your Program Director/Department Chair could then at his/her discretion return you back to your original part-time work schedule with the approval of the Office of the Provost.

For more information about either program, please contact the Office of the Provost at provost@pugetsound.edu or Human Resources at benefits@pugetsound.edu.