



The University of Texas at El Paso

Phased Retirement for Tenured Faculty Process

The University of Texas at El Paso offers faculty members who are planning to retire the option of "phasing" into complete retirement by various combinations of partial appointments. Phased Retirement is allowed when continuation of a part-time appointment will benefit both the faculty member and the University. The term of Phased Retirement shall be specified in a Phased Retirement Contract and may not exceed three years. Existing policies of the University related to retiree service and/or emeritus faculty status will apply.

A. Definitions:

1. **Retiree** - A retiree for the purpose of Phased Retirement is any tenured faculty member who voluntarily terminates employment with The University and who meets the age and service requirements for retirement under the Teacher Retirement System (TRS) or the Optional Retirement Program (ORP) of Texas.
2. **Phased Retirement** - Phased Retirement refers to a specific and mutually agreed upon period of reduced appointments in teaching, service, and scholarship prior to the full retirement of a tenured faculty member.
3. **A Phased Retirement Plan**- A proposed plan for phasing the faculty appointment from 100% active employment to full retirement. The plan will include the timeline of semesters involved, the percentage of appointment per semester, workload, academic duties, and compensation. The plan must be reviewed and approved by the applicant, the Department Chair, the College Dean, and the Provost.
4. **Phased Retirement Contract**- An approved plan that includes the timeline of semesters involved, the percentage of appointment per semester, workload, academic duties, and compensation.

B. Process and Procedures:

1. Eligible individuals desiring to pursue Phased Retirement, must develop a personal Phased Retirement Plan, through discussions and negotiations with the Department Chair at least *one* semester prior to the desired start date (except for TRS participants, who may not enter into post-retirement employment negotiations until 30 days after the date of retirement, in accordance with TRS rules). The Phased Retirement Plan will include the percent of-time of appointment for each



academic semester, academic duties to be performed, and the amount of compensation for each respective academic year.

2. Once the applicant and the Department Chair agree on the Phased Retirement Plan, the plan will be forwarded to the College Dean for review and approval.
3. If, in the opinion of the College Dean, the Phased Retirement Plan would result in significant contribution to The University, he/she shall return the plan to the faculty member for signature. Once the faculty member has signed the agreement, the Dean will submit the plan to the Provost with a request for review and approval.
4. If the Phased Retirement Plan is approved by the Provost, it will be signed and sent to the President's Office (Richard Adauto) for signature. Once signed by the President's Office, the document is returned to the Provost as an executed Phased Retirement Contract and is then copied to the College Dean, the Department Chair and the faculty member as a confirmation of the accepted contract.
5. Upon final approval, the faculty member will provide a copy of the Phased Retirement Contract to Human Resources to place in the employee file. The faculty member then processes retirement through Human Resources and ORP and maintains a postretirement appointment without tenure until the expiration of the contract. The contract will remain in effect until the end of the Phased Retirement prior to the agreed time.

C. Faculty Compensation and Benefits during Phased Retirement:

1. Salary during the Phased Retirement period is based on the academic rate at the beginning of the period and determined by the percent time of the appointment. Increases in salary, if any, will be based on merit in accordance with regular salary policies for academic appointments.
2. Group Health Insurance and other employee benefits will be available to the extent provided by Texas state law and the policies of the UT System and the University.
3. Subject to the annual instructional needs of the department and with the approval of the department and with the approval of the Department Chair and the College Dean, a faculty member may complete a one-half time appointment for an academic year by taking full-time in one semester and zero time in the other semester to maintain continuous retiree benefits and avoid Medicare implications.



4. The faculty member is eligible for emeritus/emerita status immediately upon full retirement, after the completion of the phased retirement contract.