

**UNIVERSITY OF NORTH CAROLINA WILMINGTON
PHASED RETIREMENT PROGRAM FOR TENURED FACULTY
APPLICATION INSTRUCTIONS**

Open Enrollment September 1 – November 22, 2017

1. Review of Application Materials & Release

- a. Various federal statues require that individuals considering participation in an early retirement program must receive the program application during the open enrollment period. Consequently, you must have a phased retirement application packet in hand by **November 22, 2017** to maintain eligibility for 2018-2019.
- b. Human Resources must record your name and the date you received this applicant packet to ensure compliance. This record will be maintained in your confidential “benefits file” and is not available to department chairs. **Packet must be picked up by November 22, 2017.**

2. Certification of eligibility

- a. Only tenured faculty who meet the following requirements by August 1, 2017 are eligible to participate in the Program:
 - Five years of full-time service at UNCW;
 - Age 62 or older for members of Teachers’ and State Employees Retirement System (TSERS) or 59 ½ or older for participants in the Optional Retirement (ORP); and
 - Eligible to receive retirement benefits through either TSERS or the ORP, as applicable.
- b. This program is not available to non-tenured faculty. Faculty holding full-time administrative or staff positions are not eligible for program participation unless and until they vacate their administrative position (and salary is adjusted to a 9-month or equivalent basis, as appropriate).

[Faculty with administrative appointments are not precluded from submitting an application for consideration – in anticipation that they will relinquish their administrative appointment prior to actual program participation.]
- c. Human Resources will verify your eligibility to participate in the program based on total university service and retirement system participation and record this information in your benefits file.

3. Faculty / Human Resources Conference – Required by November 22

Program guidelines require that you attend a meeting in Human Resources (group or individual) **prior to submitting an application to your department chair** to ensure you understand retirement options, eligibility for continuing benefits, and employment issues.

Group meetings:

September 7	2:00 – 3:00 p.m.	FSC Sunset Beach, 1025
September 20	10:00 – 11:00 a.m.	FSC Wrightsville Beach, 2017

If you are unable to attend one of the group meetings, contact Kelly Kennedy at 962-3006 or kennedyk@uncw.edu to schedule a meeting before the **November 22** deadline and prior to submitting an application to department chair.

We will record the date of this meeting in your confidential benefits file until you are ready to submit the application.

4. Half-Time Work Plan

Faculty must develop a half-time work plan in consultation with their department chair prior to submitting a formal application for Phased Retirement and should allow sufficient time (a minimum of two weeks) for work-plan development prior to the application deadlines.

Half-time work plans may include half-time duties for both Fall and Spring semesters or full-time duties during either Fall or Spring semester. Half-time work plans may include the full range of faculty activities including teaching, advising, research, and university or public service; however, half-time work plans may not include summer school teaching assignments.

If you have academic concerns, you may consult with Dr. Marilyn Sheerer, Provost at (962-3389) sheererm@uncw.edu concerning a typical half-time work plan prior to talking with your department chair or dean.

5. Submitting Applications

Applications for Program participation—including a fully negotiated work plan—must be submitted to your department chair by **December 1, 2017**. Formal program participation begins with Fall semester each year (regardless of whether you will be working during Fall or Spring or both).

6. Review & Approval of Applications

- a. Department chairs will review applications and forward them together with their comments to the respective dean for review.

- b. Deans will review applications and forward them together with their comments to the Provost & Vice Chancellor of Academic Affairs for final action.
- c. The Provost exercises sole authority for approving Program applications and half-time faculty work plans. Approval of a half-time work plan is required for Program participation.
- d. Program participation represents an entitlement to eligible faculty
 - 1. unless there is a specific finding that a university-wide financial exigency prevents participation or unless there is a finding that such participation would materially impede a department's ability to meet its educational program requirements; and
 - 2. subject to institutional and departmental caps of 10% and 20% of tenured & tenure-track faculty respectively.
- e. Participants must execute the General Release within forty-five (45) calendar days after the final Agreement has been fully executed. The Agreement and General Release may be revoked within seven (7) calendar days of the date both documents are fully executed by all parties.

7. Participation Priorities

If faculty interest in Program participation exceeds the institutional or departmental caps in 6.d.2 above, priority will be given to eligible faculty with the greatest length of service within the UNC system. If Program limits preclude enrollment in the year for which an eligible faculty member first applies, that individual will have priority for the following year and before consideration of faculty who first apply for participation in the subsequent year. However, faculty may not apply "in advance" of their intended participation year.