

Phased Retirement Guidelines

Upon eligibility for retirement, a tenured faculty member may choose to apply for phased retirement in lieu of immediate full retirement. The phased retirement arrangement can be made for a period of up to three years, during which the faculty member will be assigned a 50% teaching workload and receive 50% of his/her nine-month academic rate of pay before the separation.

To apply for Phased Retirement, faculty must submit a formal request to the School Director/Department Chair. After the School Director/Department Chair recommends in favor, the request is forwarded to the Dean. If the Dean approves, the dean's office will prepare a "Phased Retirement Agreement and Release of Claims contract" ("Agreement"), which clearly defines the terms of the phased retirement. The Agreement must be signed by the faculty member, and forwarded to the Office of the Executive Vice President and Provost for final approval.

A phased retirement agreement requires the faculty member to voluntarily resign his/her tenured UTRGV faculty appointment and employment, and relinquish tenure. The Agreement will define the faculty members teaching load, effort and academic rate for the duration of the phased retirement period. Faculty on phased retirement will not be eligible to receive any salary increase unless mandated by the legislature. Faculty will remain eligible for all employment benefits in accordance with UTRGV regulations.

The faculty member's teaching assignments and other academic duties and responsibilities during the phased retirement period will be assigned by the School Director/Department Chair in accordance with university policy.

Faculty on phased retirement will remain eligible to serve as principal investigator on sponsored project proposals currently held (unless prohibited by the funding agency), and on graduate committees, subject to the approval of the Director/Chair and Dean. However, they will *not* be eligible to serve as principal investigator on new sponsored project proposals; nevertheless, the faculty may be allowed to serve as a Co-PI or senior personnel, if allowed by the funding agency. Faculty on phased retirement will not be eligible to serve on personnel or budget or curriculum committees, including annual evaluation, tenure/promotion, and post tenure review committees.

Faculty members interested in phased retirement are encouraged to consult with the Human Resources (HR) office regarding eligibility for retirement benefits. The faculty member is solely responsible for consulting with HR and his/her retirement program to determine eligibility for retiree benefits and apply for such benefits in accordance with state law.

Dates Reviewed and Revised

Revised: June 26, 2019

Reviewed: November 10, 2021