

Phased Retirement Program
Important Factors to Remember in Approving Phased Retirement
for WCU Faculty

1. Faculty member gives up tenure and must be employed full time at the time of this request. Participating faculty who are members of TSERS must be at least age 62 upon entering the Phased Retirement Program, have at least five years of full-time service at his or her current institution, and be eligible to receive a retirement benefit under either TSERS. Participating faculty who are participants in the ORP must be at least age 59 1/2 upon entering the Phased Retirement Program, have at least five years of full-time service at his or her current institution, and be eligible to receive a retirement benefit under ORP.
2. Eligible faculty members do not have an absolute right to participate in the program.
3. Institution can limit participating in the program based on:
 - a. The finding that financial exigencies prohibit enrollment in the Phased Retirement Program.
 - b. Further enrollment (one or more faculty in same department) in the Phased Retirement Program will substantially weaken the academic quality or disrupt program sequence.
 - i.e.
 - Advisement
 - Content expertise
 - Scope and sequence of content
 - Service
 - Scholarship
 - AFE guidelines
 - c. The institution may establish a cap or limit the number of eligible faculty members who may enter the Program.
 - d. The department may redefine the position as long as the load is equal to that of teaching, service, and scholarly activity.
 - i.e. a faculty member could teach an extra course in lieu of scholarly activity
 - e. Teaching by phased retirees may include special topics courses, independent studies, or seminars as long as the load is approved by the dean and the department head.
4. Half-time responsibilities may vary, but a half-time workload is expected for a year or full-time work for a semester of an academic year providing a department can continue to function without the loss of the workload in the semester that this particular faculty member would not be working in a department.
5. Faculty members receive a salary equal to 50% of the salary they received prior to phased retirement. However, if a faculty member occupies a full-time administrative or staff position the 50% salary is based on the conversion of the position back to the faculty

position. Phased retirees are eligible for salary increases and merit pay in subsequent years of the Program based on annual evaluations, but not during their first year.

6. Faculty members are subject to the Code of UNC.
7. The institution may approve participation in the Phased Retirement Program for up to 3 years.
8. The Department Head should determine the duties necessary in this arrangement considering suggestions from the faculty member such that the quality of the program will be maintained for the years of the phased contract.
9. The Department Head makes a recommendation to the Dean who determines whether the department and degree program will not be weakened by such an arrangement.
10. The Dean of the College will approve all phased retirements of the College and make recommendations to the Provost for final approval.
11. The final contract must be approved by
 - a. Eligible Faculty Member
 - b. Department Head
 - c. Dean of College
 - d. Provost
12. Once made, a decision to enter the Program is binding.
13. Participating faculty members are expected to maintain high levels of professional commitment to their institution and evaluated on a yearly basis, through the regular AFE process.
14. Tenured library faculty phased appointments are for 12 months at 20 hours a week.