



**SAMPLE 1**

Professor John Smith wishes to gradually decrease his workload in anticipation of full retirement. He completes and submits a Phased Retirement Application proposing to reduce his workload over a three-year time period - working 75% of a full-time workload in year one, 50% of a full-time workload in year two, and 25% of a full-time workload in year three. He proposes that his workload will be spread ratably over the academic year (i.e. his fall workload and his spring workload will be the same). His application is approved, and a Phased Retirement agreement is executed by Professor Smith and his university president.

**Faculty Member Information:**

Name: John Smith Phone Number: 103-456-7890  
 Personnel #: 99999 Department: Mathematics  
 Email Address: jsmith@iup.edu University: Indiana University

**Proposed Arrangement:**

The Phased Retirement arrangement must start with the Fall Semester. The arrangement can span 1-3 years.

**Phased Retirement Begin Date:**

August 24, 2020

**Percentage of time to be worked during phased retirement:**

(Must be 50% - 99%, except for final year which may be 25% - 99%)

**Phased Retirement End Date:**

July 15, 2023

	Required:	Optional:	
Workload Year 1	AY 20/21: 75 %	Fall: %	Spring: %
Workload Year 2	AY 21/22: 50 %	Fall: %	Spring: %
Workload Year 3	AY 22/23: 25 %	Fall: %	Spring: %

Date Submitted: March 1, 2020

**Response**

Approved  03/10/2020  
 Dean/Other Appropriate Manager Date

- Approved  
 Provisionally Approved with Modifications\*:

**Faculty Member Response:**

- Agreed  
 Decline to Participate

\*If the arrangement is provisionally approved with modifications, send a copy to the Human Resources department for review.

- Disapproved

 03/20/2020  
 President/Designee Signature Date

April 2, 2020

President Driscoll  
Indiana University of Pennsylvania

Sutton Hall  
1011 South Drive  
Indiana, PA 15705

Re: Retirement

Dear President Driscoll,

I am writing to notify you of my retirement pursuant to the terms of the Phased Retirement Side Letter negotiated between APSCUF and PASSHE. I am retiring effective July 15, 2023.

Pursuant to the terms of the approved Arrangement dated March 20, 2020, and attached to this letter, I understand:

1. That the decision to retire is solely my decision; and that the decision to retire is irrevocable once accepted by you or your designee; and,
2. That I am required to continue to perform the duties of my employment during the term of the approved Arrangement; and,
3. That I can accelerate my retirement date in accordance with the terms of the Phased Retirement Agreement noted above upon notification, in writing, to you;

Sincerely,

  
\_\_\_\_\_  
Signature of Faculty Member

John Smith  
\_\_\_\_\_  
Printed Faculty Member Name

Retirement Accepted by:

  
\_\_\_\_\_  
President or Designee

04/04/2020  
Date

c: University Human Resources Director  
Local APSCUF  
State APSCUF  
Appropriate Manager

Enclosure – Approved Phased Retirement Application



**SAMPLE 2**

Professor Marcia Brady would like to decrease her workload for a two-year period. She wishes to work a 50% of full-time workload over two academic years, but she would like to “front-end load” her schedule - working a 100% of full-time workload in the fall semester, and a 0% workload (i.e. not working) in the spring semester. She completes and submits a Phased Retirement application indicating her preferred arrangement. Her application is approved, and a Phased Retirement agreement is executed by Professor Brady and her university president

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**Faculty Member Information:**

Name: Marcia Brady Phone Number: 717-888-9999  
 Personnel #: 11111 Department: Communications  
 Email Address: marcia.brady@millersville.edu University: Millersville

**Proposed Arrangement:**

The Phased Retirement arrangement must start with the Fall Semester. The arrangement can span 1-3 years.

**Phased Retirement Begin Date:**

August 24, 2020

**Percentage of time to be worked during phased retirement:**

(Must be 50% - 99%, except for final year which may be 25% - 99%)

**Phased Retirement End Date:**

May 31, 2022

	Required:	Optional:	
Workload Year 1	AY 20/21: 50 %	Fall: 100 %	Spring: %
Workload Year 2	AY 21/22: 50 %	Fall: 100 %	Spring: %
Workload Year 3	AY 22/23: %	Fall: %	Spring: %

Date Submitted: February 4, 2020

**Response**

Approved  02/17/2020  
 Dean/Other Appropriate Manager Date

- Approved  
 Provisionally Approved with Modifications\*:

**Faculty Member Response:**

- Agreed  
 Decline to Participate

\*If the arrangement is provisionally approved with modifications, send a copy to the Human Resources department for review.

- Disapproved

 02/23/2020  
 President/Designee Signature Date

March 3, 2020

President Wubah  
Millersville University of Pennsylvania  
101 North George Street  
Millersville, PA 17551

Re: Retirement

Dear President Wubah ,

I am writing to notify you of my retirement pursuant to the terms of the Phased Retirement Side Letter negotiated between APSCUF and PASSHE. I am retiring effective May 31, 2021 .

Pursuant to the terms of the approved Arrangement dated February 23, 2020, and attached to this letter, I understand:

1. That the decision to retire is solely my decision; and that the decision to retire is irrevocable once accepted by you or your designee; and,
2. That I am required to continue to perform the duties of my employment during the term of the approved Arrangement; and,
3. That I can accelerate my retirement date in accordance with the terms of the Phased Retirement Agreement noted above upon notification, in writing, to you;

Sincerely,

  
\_\_\_\_\_  
Signature of Faculty Member

Marcia Brady  
\_\_\_\_\_  
Printed Faculty Member Name

Retirement Accepted by:

  
\_\_\_\_\_  
President or Designee

03/10/2020  
Date

c: University Human Resources Director  
Local APSCUF  
State APSCUF  
Appropriate Manager

Enclosure – Approved Phased Retirement Application