

**GUIDELINES FOR TRANSITION TO RETIREMENT PROGRAM
FOR FACULTY AT LEWIS KATZ SCHOOL OF MEDICINE
(Updated March 2021)**

PURPOSE OG PROGRAM: To provide a voluntary program in which full-time faculty can transition to retirement by working at 50% effort per year, for periods from one to three years. Participation in the program is on a voluntary basis and is subject to the Medical School's policies which prohibit discrimination.

ELIGIBILITY: Application to participate in the Transition to Retirement Program is strictly voluntary and is a benefit available to faculty who qualify based on the eligibility requirements.

Any full-time Tenured, Clinician Educator Track (CET) or Non-Tenure-Track (NTT) faculty member who is 62 years of age or older and who has a minimum of 10 years of service with Temple University may elect to participate in the LKSOM Transition to Retirement Program. Participation in this program by CET or NTT faculty does not guarantee contract renewal during the transition period.

PROGRAM APPROVAL PROCESS: Biannually, eligible faculty will be able to request to participate in the Transition to Retirement Program by completing an election form and submitting the form to immediate supervisor (Division/Section Chief, Center Director, or Department Chairperson, as applicable). Where the immediate supervisor is not the Department Chairperson, the Department Chairperson must also approve the request. The Chairperson then must submit the request to the LKSOM Senior Associate Dean for Faculty Affairs, who will submit the request to the Dean. If approved by the Dean, the School will notify the Vice-Provost for Faculty Affairs and also forward the election form to Human Resources. Upon receipt of an approved election form, the Human Resources Department will schedule a time to meet with the faculty member and have the faculty member sign an agreement outlining the terms and conditions of the Transition to Retirement Program Once signed, the faculty member will have 7 days to revoke the agreement. Thereafter, the agreement will be irrevocable, and the faculty member will be required to retire as per the date reflected in the agreement. Exceptions will not be made for any reason.

Acceptance of a faculty member's request to participate in the Transition to Retirement Program is at the sole discretion of the School of Medicine based on departmental/section/division/center needs, to ensure that every unit within the School has the ability to meet clinical, academic and student needs. A decision to deny the faculty member's request is not subject to any dispute resolution process. Such decisions will be communicated in writing to the faculty member, including the reason for the decision.

A faculty member not approved for participation for a given transition period may reapply for a subsequent enrollment period.

PROGRAM OPTIONS: The Transition to Retirement program offers the following two options:

1. Reduction of effort to 50% across the transition period. Faculty selecting this option may choose transition period lengths as follows:
 - 1 year
 - 1.5 years

- 2 years
- 2.5 years
- 3 years

2. Work at 100% effort for 6 months and not work for 6 months. Faculty selecting this option may only choose transition period lengths as follows:

- 1 year
- 2 years
- 3 years

PROGRAM DEADLINES: The commencement of any transition to retirement period may be on either January 1 or July 1 of a given year. Deadlines for submission of the election form to the LKSOM Senior Associate Dean for Faculty Affairs are as follows:

- For transition to retirement periods to begin on January 1: the deadline for submission is June 15 of the prior calendar year.
- For transition to retirement periods to begin on July 1: the deadline for submission is December 15 of the prior calendar year.

Requests that are submitted after these deadlines may still be considered for approval providing coverage of lost workload can be arranged by the start of the transition period, as determined by the immediate supervisor, Department Chairperson and the Dean.

As noted above, participation in this Program does not guarantee contract renewal for CET or NTT faculty during the transition period. Employment remains subject to the requirements stated in the faculty member's current active contract.

TRANSITION PERIOD: The Dean or his/her designee will be responsible for assigning the faculty member's duties and these will be both reasonable and fair and reflect the reduction in effort or time chosen. As part of the assignment of duties, the Chairperson or the Dean will have discretion over the faculty member's continued participation on committees. Although a faculty member may request the terms of a reduction in duties, the Chairperson, in consultation with the Dean, will make the final determination based on student/faculty scheduling needs and/or the need for clinical activities.

The faculty member will receive 50% of his/her salary during this time period, spread out over 12 months, regardless of which option is chosen. All benefits will continue during this transition period; any benefit that is salary based will be based on the adjusted salary. A faculty member participating in this transition program will be eligible to receive annual increases, including merit, commensurate with job performance. Standard performance metrics will reflect the percentage effort or the portion of the calendar year worked by the faculty member.

For faculty members participating in this program, 10 days of vacation time will be permitted each year they are enrolled in the program.