

GUIDELINES FOR TRANSITION TO RETIREMENT FOR TAUP FACULTY

PURPOSE: To provide a voluntary program in which full-time faculty can transition to retirement by working one academic semester a year for up to three years. Participation in the program is on a voluntary basis and is subject to the University'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 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 this Transition to Retirement Program.

ELIGIBILITY PERIOD: Annually, eligible faculty will be able to elect to participate in the Transition to Retirement Program by completing an election form and submitting the form to his/her Chair, Dean and to the Vice-Provost for Faculty Affairs. The Chair and the Dean will make a recommendation to the Vice-Provost based on student/faculty scheduling needs. The Vice-Provost will then forward the form (whether approved or not approved) to Human Resources and to the TAUP. A Dean making the recommendation not to approve the election will communicate the decision and the reason for the decision to the faculty member as well as to the Vice-Provost. An election form must be received by December 31 in any given year for participation in the Transition to Retirement Program during the following fall semester.

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.

RETIREMENT TRANSITION: A faculty member who participates in the Transition Program will be eligible to carry a zero workload for either the fall or spring academic semester each academic year for a maximum of 3 academic years. (Note: for purposes of the Transition to Retirement Program, the summer semester will not be included). The Dean will be responsible for assigning workload; the faculty member will be assigned a full workload that is both reasonable and fair for the semester in which he/she works. As part of the workload assignment, the Dean will have discretion over the faculty member's continued participation on committees.

The faculty member will receive 50% of his/her salary during this time period, spread out over 12 months. 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 the annual increases, including merit, and bonuses as per the collective bargaining agreement.

A faculty member may request to have the zero workload in either the spring or fall semester of the academic year. However, there is no guarantee of approval for the academic semester requested. The Dean will make the final determination based on student/faculty scheduling needs. Where a faculty member has not been approved to have the zero workload for his/her requested semester, he/she may participate in the Transition Program for the first academic year approved by the Dean; he/she may then

apply for a change to the semester for which he/she has the zero workload for the remaining years of the program participation. Any adjustment is in the sole discretion of the Dean and not subject to the grievance/arbitration provisions of the TAUP contract or other dispute resolution process. Where a faculty member chooses not to apply for an adjustment to the academic semester assigned, the schedule of full workload/zero workload or zero workload/full workload will continue for the duration of the transition period.

RECRUITMENT OF FACULTY: The University will recruit faculty to replace faculty participating in the Transition to Retirement Program during the semester in which they carry the zero workload. The University may recruit/employ, in the University's sole discretion, adjuncts, non-tenure track faculty and/or tenure track faculty. The University, in its sole discretion, may decide the number, rank, type of faculty, appointing School or College, appointing department and term of appointment.

The University's decisions regarding the faculty hired to replace faculty participating in the Transition to Retirement Program is not subject to the grievance/arbitration provisions of the TAUP contract or other dispute resolution mechanism. Faculty participating in the Transition to Retirement Program will count as $\frac{1}{2}$ (0.5) faculty member for the purpose of determining number of faculty for allocation or calculation of certain University benefits and/or programs (e.g., calculation of study leaves).

ELECTION OF RETIREMENT: Acceptance of a faculty member's election to participate in the Transition to Retirement Program will be at the discretion of the University based on departmental needs to ensure that every department within each school/college has the ability to meet academic and student needs. A decision to deny the election may not be grieved and is not subject to the grievance/arbitration provisions of the TAUP contract or other dispute resolution process.

A faculty member not approved for participation in the year in which he/she applies may reapply the following year.

The University may amend and/or modify the Transition to Retirement Program after discussion with and approval by the union provided such approval is not unreasonably withheld.

