

Application for Phased Retirement

Procedures

- 1) Review the phased retirement guidelines on the EVPP website.
- 2) Complete this application and forward it to your supervisor (department chair or unit director).
- 3) Upon review, the supervisor will determine if the request can be supported. If supported, the application should be endorsed by the supervisor and sent to the dean for review. Determinations at each level shall be done on an individualized basis, considering relevant factors that include department/unit needs and obligations, the proposal of work from the employee, and the benefits to the department/unit and employee. If the application is not approved at any level, a notification from the appropriate signatory authority should be provided in writing to the employee.
- 4) The dean's office will forward all approved applications to the Office of the Executive Vice President and Provost.
- 5) The Executive Vice President and Provost will make a final decision regarding the request for Phased Retirement. When making this decision, the Executive Vice President and Provost will consider relevant factors which include university needs and obligations, the benefits to the University and the employee, and the University's business and operational needs and obligations. If approved, a Phased Retirement Agreement will be sent to the applicant for signature. If the application is denied, a notification will be sent to the employee with notification to the supervisor and dean.

Employee Information

Full Name:

Address:

Employee ID #

Department / Unit

Length of annual appointment (in months)

Phased Retirement Contract Length Requested (max 2 years) *

Phased Retirement Start Date:

Faculty: Beginning of Fall or Spring semester

Phased Retirement End Date:

Must be the last day of the month

**NOTE: The FTE and contract length may not be increased after the agreement has been signed by all parties*

Current Allocation of Effort and Responsibilities

Outline your current job duties describing the percentage of effort and activities performed. If you are teaching, include the number of courses taught each semester, research projects, and service activities, including your current effort allocation for Teaching, Research, and Service.

Phased Retirement FTE and Responsibilities

Outline your phased retirement job duties if they differ from your current position.

Indicate teaching, research and service commitments and level of effort (including percentages) per semester for the requested phased retirement years. You do not need to specify each semester's worth of duties if the duties do not change from semester to semester. *Reduced responsibilities must equal 51% of the original FTE as divided between Teaching, Research, and Service, with each area having at least 5%.*

Employee Signature

By signing and submitting this application, the Employee agrees to be bound by the terms and conditions of the Phased Retirement Program for Northern Illinois University, if accepted by the University.

Employee Signature:

Date:

Phased Retirement Application Review and Endorsements

Supervisor or Department Chair Review

I have reviewed this Phased Retirement plan. By my signature below, I indicate my endorsement of the plan and that:

1. It will not interfere with the ability of the unit to meet its obligations.
2. The activities specified are appropriate for the level of effort.
3. The unit, as well as the employee, will benefit from the Phased Retirement.
4. If the position is grant funded, approval from the Office of Sponsored Projects Administration must be secured and attached to the application.

Signature:

Date:

Print Name:

Dean or University Director Review

I have reviewed this Phased Retirement plan. By my signature below, I indicate my endorsement of the plan and that:

1. It will not interfere with the ability of the unit to meet its obligations.
2. The activities specified are appropriate for the level of effort.
3. The unit, as well as the employee, will benefit from the Phased Retirement.
4. If the position is grant funded, approval from the Office of Sponsored Projects Administration must be secured and attached to the application.

Signature:

Date:

Print Name:

Last Steps

- Forward completed application to provost@niu.edu
- Approved applicants will receive a Phased Retirement Agreement that formalizes the terms outlined in this application for signature.