



## The College at Brockport

**Category:**

Office of Human Resources

**Responsible Office:**

Human Resources

**Policy Title:**

Non-Teaching Employee Phased Retirement Program for Non-teaching Professionals and Classified Staff

**Policy:**

This program allows non-teaching employees to apply for a reduced work obligation for a period of one year. The reduced work obligation requested must be sufficient to keep the participant benefits eligible.

*Note: Not all positions are conducive to this arrangement. It should be understood that this program is not an entitlement, but rather an option to be explored between the staff member, supervisor, Vice President/Provost of a division. Eligibility does not guarantee acceptance into the program.*

Both the College and the applicant must carefully consider the implications of participation in this program. Such implications would include a reduced salary, diminished final average salary (for staff in the Employee's Retirement System or the Teacher's Retirement System), less money being contributed to retirement contracts, accrual earning changes, and differences in contractual raises (across the board or lump sum distributions). For these reasons, consideration as to whether or not to participate in the program is a serious matter and should be reviewed with great diligence. In many cases, the staff member should review their plans with tax advisors, retirement system representatives, benefits staff or financial planners before making the decision to apply.

**Goals:**

- Provide eligible staff with an opportunity to transition smoothly into retirement by working a reduced obligation and developing other facets of their lives
- Promote workforce succession planning by developing staff and considering internal promotions and reassignments
- Assure the transfer of knowledge to new staff through mentoring
- Promote the renewal and vitality of both the participant and the College
- Generate salary dollars to be deployed in other ways
- Provide increased university flexibility in staffing

**Eligibility:**

- Participant must attain age 55 prior to entering the program or during the duration of their participation
- Participant must have 10 years of benefits eligible service with New York State prior to participation.

Program Notes:

Participants will retain their current line.

Participants will be deemed “part-time” and subject to the employment regulations set forth in their union contracts and/or the SUNY Board of Trustees Policies.

Participants will retain the full range of rights, benefits and responsibilities appropriate for their title, percentage of effort, role, union affiliation (if applicable) and status.

Participants salary will be reduced to a percentage of current salary that mirrors appointment percentage agreed upon in the application process. Example: Dr. Smith currently earns \$40,000 per year and begins a phased retirement at 50% on 9/1. As of 9/1 Dr. Smith’s salary will be reduced by 50% to \$20,000.

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**Procedure:**

1. Application package completed by applicant and immediate supervisor
  - A. Phased Retirement Application Form
  - B. Detailed description of revised job duties
  - C. Letter of intent to retire and effective date (date will correspond to completion of participation in program)
2. Application routed through department/division chain of command for approval
3. If package is not approved return package to supervisor with reason for determination
  - A. Supervisor notifies applicant

If approved see number 4.

4. The application package (with appointment form) is submitted to the Office of Human Resources at least three months, but no greater than 12 months prior to the effective date of program participation.
  - A. First appointment form will indicate effective date of participation in the program  
*\*Note: appointment form must reflect reduced work obligation FTE/percentage*
  - B. Second appointment form will indicate effective date of retirement
5. Applicant is sent official letter of acceptance into the program.
6. Supervisor must submit updated Performance Program for applicant thirty days prior to program commencement.

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**Forms:**

[Phased Retirement Application Form](#)