



## Phased Retirement Program

**Purpose:** The Alamo Colleges Phased Retirement Program is designed for full-time faculty, staff and administrators who:

1. declare their intention to retire and participate in the program during the period between October 1, 2009 and April 30, 2010;
2. are eligible to draw a normal TRS (Teachers Retirement System) or ORP (Optional Retirement Program) retirement benefit upon retirement; and,
3. retire during the period between October 1, 2009 and , August 31, 2010.

Participating faculty will be offered a three-year, nonrenewable teaching assignment equal to 49 percent of the faculty member's final full-time contractual course-load and base pay. It is expected that the assignment will include a significant teaching component but duties may include a combination of credit and noncredit instruction, counseling, and if needed by the department program development or other duties as agreed between the faculty member and the assigned supervisor. Participating faculty members may arrange post-retirement work assignment that is less than 49% of a full-time course-load at a corresponding rate of reduced pay.

Participating staff and administrators will be offered a one-year nonrenewable work assignment equal to 49 percent of the employee's final workload and base pay. It is expected that the work assignments for participating staff and administrators will be made in the same department from which the employee retired or a similar one. It is expected that job duties will be similar to those performed prior to retirement as assigned by the designated supervisor. Participating staff and administrators may arrange post-retirement work assignment that is less than 49% of a full-time workload at a corresponding rate of reduced pay.

**Background:** The Alamo Colleges Phased Retirement Program is intended to:

- promote the well-being of employees transitioning into retirement,
- support improved projections of future staffing levels, costs and needs,
- support more effective recruiting, particularly for hard-to-fill positions, and
- produce cost savings through the elimination of positions and salaries.

The District intends to eliminate positions that are vacated by participating employees,

or a comparable position.

**Procedures:** Employees who wish to participate must terminate employment, will be required to formally declare themselves "retired", be formally accepted for retirement by the District, be declared retired for pension purposes as required by TRS or ORP and if they wish to obtain medical coverage, satisfy the additional requirements of ERS (Employees' Retirement System of Texas).

The employee and the District must agree that the District does not guarantee any payment of retirement benefits from other retirement sources, such as the TRS (Teacher Retirement System), ORP (Optional Retirement Program), Tax-Sheltered Annuity Plan or other similar sources.

The salary for an employee will be a percentage not to exceed 49 percent of the regular nine-month contract salary in effect during the last year of full-time employment if a faculty member or full-time work if an employee or administrator. Retired administrators participating in the program will not have an employment contract and will be classified as a professional. Participants will not be eligible for salary increases, general increases or other pay adjustments except as required by law.

Participants are not eligible to perform additional extra service, work extra hours, or accept additional course loads. No other form of special pay, supplemental service agreement or extended service agreement pay is available or can be provided, except that faculty participants may be offered up to 5 hours during the entire summer if the department has a need (and all other requirements of the Program are still met). Summer course loads are not guaranteed.

Note: if a program participant is a TRS retiree, it is ultimately the responsibility of the retiree to determine how much they can work during the spring, fall or summer in order not to jeopardize their annuity.

Phased retirement work assignments cannot be extended beyond three years for faculty or one year for staff members and administrators, but an assignment may be vacated by the employee at any point upon a written request. Such a written request signifies cancellation of the assignment and no further participation in the phased retirement program can be authorized.

All personnel and performance policies and procedures of the district apply during the entire period of phased retirement program employment.

Enrollment in the program must occur before retirement and cannot be authorized after the retirement has begun.

Employees retired before October 1, 2009 are not eligible to participate in the Phased Retirement Program.

**Employee  
Responsibility:**

Eligible employees who wish to participate in the program must:

1. complete the Phased Retirement Participation Acknowledgment Form and submit it to Employee Services at least one month prior to the desired date of retirement;
2. be separated from employment with the District and in the status of a retiree as defined by TRS for at least one full calendar month or otherwise incur a break in service, as defined by TRS for the employee's position (Note: ORP has slightly different requirements), before being reemployed for a phased retirement assignment;
3. receive an assignment letter describing the phased retirement work assignment and conditions from Employee Services; and,
4. sign and return the assignment letter to Employee Services before the first day of work.

**Employee  
Services  
Responsibility:**

The Employee Services benefits staff will assist employees who wish to declare their intention to retire and participate in the program.

The Employee Services employment staff will coordinate the development of phased retirement work assignments and the designation of assignment supervisors.

Phased retirement assignments and supervisor designations will be approved by the participant's college president or vice chancellor.

The Associate Vice Chancellor for Employee Services will submit the names of employees who wish to participate in the phased retirement program to the Chancellor.

Alamo Colleges Employee Services - September 2009