



Phased Retirement Application and Agreement

Employee Name: _____
Effective Date of Phased Retirement: _____
Phased Retirement Term from _____ to _____
CWU Campus: _____ Department: _____
Birthdate: _____ Years of CWU/State Service _____
Retirement Plan: _____

I wish to participate in the Central Washington University Phased Retirement Program (“the Program”) as provided in Article 23 of the Collective Bargaining Agreement between CWU and United Faculty of CWU (“Faculty Contract”). In submitting this Phased Retirement Application, I hereby voluntarily offer to transition from a full-time faculty position to a half-time phased retirement position. I understand that my phased retirement, if approved, will begin no later than the fall quarter of the academic year immediately following my submittal of the phased retirement application. I understand that this application is subject to acceptance by CWU.

Upon CWU’s acceptance of my application to participate in the Program, CWU is obligated to offer me continued employment for a maximum term of two years (up to six consecutive quarters excluding summer quarter). Such employment shall be on a half-time basis (or equivalent). Compensation during the period of my phased retirement shall be one-half of the full-time salary I was earning immediately prior to phased retirement based on my last 9- or 12-month contractual term of full-time employment, plus whatever periodic salary increases as may be provided for continuing faculty under the Faculty Contract.

I understand that during the term of my phased retirement employment, I will continue to participate in state or institutional employee benefits programs for which I am eligible as a half-time employee, including retirement and health care insurance plans. I further understand that, during the term of my phased retirement employment, I may not elect to begin receiving the benefits I have accrued under either the Central Washington University Retirement Plan (“CWURP”) or the Teachers’ Retirement System (“TRS”) through the Washington State Department of Retirement. Employer and employee retirement contributions will continue to be made on all earnings in accordance with the applicable Plan.

During the term of my phased retirement employment, I will continue to be subject to all applicable provisions of the Faculty Contract and CWU policies and procedures.

I also understand that, in order to be eligible to participate in the Program, I must:

- Be a full-time tenured faculty member;
- Be 62 years of age or older;
- Have this *Phased Retirement Program Application and Reemployment Agreement* approved and signed by the Provost;
- Work with my department chair and college dean to determine my workload plan for my period of phased retirement employment.

NOTE: Faculty planning to transition from phased retirement to full retirement should check the eligibility requirements for their particular retirement plan. Please contact Human Resources – Benefits (phone: 509-963-1202; email: hr@cwu.edu) for additional information.

I understand and agree that once my term of my phased retirement employment has begun, there is no possibility of my reentering full-time status. I will retain my tenured status during the term of my phased retirement employment, but at the end of that term I will fully retire and relinquish my tenured status, and CWU will have no obligation to offer me continued employment.

I understand that the approved application will be forwarded to the President with a recommendation for the Board of Trustees to confirm at their next regularly scheduled meeting.

I understand and agree that my decision to participate in this program is voluntary and irreversible.

Signed _____ (Eligible Faculty Member)	Date _____
Signed _____ (Department Chair)	Date _____
Signed _____ (College Dean)	Date _____
Signed _____ (Provost)	Date _____

CENTRAL WASHINGTON UNIVERSITY AND
UNITED FACULTY OF CENTRAL WASHINGTON UNIVERSITY
September 1, 2017 – August 31, 2020

ARTICLE 23 - RETIREMENT

- 23.1 There is no mandatory retirement age for faculty members.
- 23.2 Upon recommendation of a chair to the Dean/director, any retired faculty member may be invited to resume employment on a contract basis with the University.
- 23.3 Phased Retirement allows tenured faculty to retire gradually over a maximum period of two (2) years. Faculty accepted into Phased Retirement will receive a fifty percent (50%) reduction of responsibility for up to six (6) consecutive quarters (excluding summer quarter) prior to full retirement.
- 23.3.1 Faculty requesting Phased Retirement must be 62 years of age or older.
- 23.3.2 Applications for Phased Retirement will be submitted to the applicant's department chair. The chair will forward the application, along with a recommendation regarding the application and a statement of operational impact, to the Dean according to any announced deadlines for the program. Applications must be approved by the Dean, Provost, President and Board of Trustees, and may be denied or delayed based on operational impacts. Approved applicants will receive a Phased Retirement contract.
- 23.3.3 While on Phased Retirement, participants will be compensated based on a 50% appointment, and will remain eligible for University benefits according to plan terms.
- 23.3.4 Once the Phased Retirement period has begun, there is no possibility of reentering full-time status. Participants retain tenured status during the Phased Retirement period, but will fully retire and relinquish their tenured status at the end of the Phased Retirement period.
- 23.3.5 The two-year Phased Retirement period is a maximum. At any time during the two-year Phased Retirement period, participants may request full retirement according to the regular procedure.