

Fayetteville State University Phased Retirement Guidelines

Fayetteville State University's Phased Retirement Program Guidelines contain the supplemental procedures and participation standards for the University of North Carolina Phased Retirement Program. These institutional guidelines address the issues identified in the Administrative Regulations for Implementation of University of North Carolina Phased Retirement Program.

Guideline 1

Institutional Limitations on Participation

Fayetteville State University will limit participation to 20% of the full-time, tenure-track faculty membership of a program area. In program areas with fewer than five (5) members, participation in the program is limited to one.

Guideline 2

Limits on Participation Due to Financial Exigencies

The university reserves the right not to approve any request for participation in the phased retirement program when a bona fide state of financial exigency exists. A state of financial exigency exists when the university suffers a significant decline in student enrollment which in turn results in reduced revenues from state appropriations and tuition and fees. Further, when financial exigency requires the elimination of part-time faculty and vacant positions, the non-reappointment of fixed-term faculty, and possible reduction-in-force of some tenure-track full-time faculty, the university will not approve phased retirement requests. Under a state of financial exigency, the university will continue to allow previously approved faculty to complete phased retirement terms.

Guideline 3

Limits on Participation Due to Academic Program Compromise

Fayetteville State University's Phased Retirement Program will be open to all eligible tenured, full-time faculty members meeting the specifications of the UNC Phased Retirement Program. However, the Provost and Vice Chancellor for Academic Affairs in conjunction with the department chair(s) and dean(s) will annually review and determine the need for any exceptions to the institutional cap. As a result of this annual review, the Provost and Vice Chancellor will set, if needed, appropriate limits. An annual limit may be necessary due to:

- C the impact of phased retirement faculty on curriculum delivery; and/or
- C the minimum full-time faculty requirements for accreditation purposes.

Guideline 4

TABLE OF ELIGIBLE AND INELIGIBLE FACULTY
(This Is Projected Thru August 1, 2002)

Department				
	Accounting			
	Rank & Title*	Age*	Eligible*	Ineligible*
	Professor	69	1	0
		50	0	1
	Associate Professor	43	0	1
Department				
	Economics & Finance			
	Rank & Title*	Age*	Eligible*	Ineligible*
	Professor	62	1	0
		51	0	1
		47	0	1

Department				
	Educational Leadership			
	Rank & Title*	Age*	Eligible*	Ineligible*
	Professor	61	1	0
	Professor & Dean	55	0	1
	Associate Professor	57	0	2
		53	0	1
Department				
	Elementary Education			
	Rank & Title *	Age*	Eligible*	Ineligible*
	Professor	68	1	0
		63	1	0
		55	1	0
	Associate Professor	63	1	0
	Assistant Professor	68	1	0
		49	0	1
Department				
	English & For. Languages			
	Rank & Title*	Age*	Eligible*	Ineligible*
	Professor	57	1	0
	Associate Professor	67	1	0
		64	1	0
		58	0	1
		53	0	2
		45	0	1
	Assoc Prof/Exec to Chan.	43	0	1
	Assistant Professor	75	1	0
		59	1	0
		54	0	1

Department			
	Performing & Fine Arts		
	Rank & Title *	Age *	Eligible *
	Professor	70	1
		68	1
		66	1
	Associate Professor	72	1
		58	0
		57	1
		51	0
	Assistant Professor	60	1
Department			
	Government & History		
	Rank & Title *	Age *	Eligible *
	Professor & Dean	63	0
	Professor	62	1
		60	1
		55	0
		52	0
		48	0
	Associate Professor	68	1
		56	1
		55	1
		53	0
		52	0
		42	0
	Assistant Professor	36	0
Department			
	Health, P.E. & Hum. Svs.		
	Rank & Title *	Age *	Eligible *
	Professor	67	1
		65	1

		60	1	0
	Associate Professor	66	1	0
		52	0	1
		49	0	1
	Assistant Professor	70	1	0
Department				
	Management			
	Rank & Title*	Age*	Eligible*	Ineligible*
	Professor & Dean	52	0	1
	Associate Professor	65	1	0
		55	0	1
		39	0	1
Department				
	Marketing & Bus. Edu.			
	Rank & Title*	Age*	Eligible*	Ineligible*
	Professor	45	0	1
	Associate Professor	38	0	1
	Assistant Professor	45	0	1
Department				
	Math & Computer Science			
	Rank & Title*	Age*	Eligible*	Ineligible*
	Professor	67	1	0
		60	1	0
	Professor & Director	58	0	1
	Professor	53	0	1
	Associate Professor	55	0	2
		54	0	1
		47	0	1
		44	0	1

Department				
	Mdl. Grs, Sec. & Spec. Edu.			
	Rank & Title *	Age *	Eligible *	Ineligible *
	Professor	67	1	0
		66	1	0
		63	1	0
		60	1	0
		59	1	0
	Professor & Dean	58	0	1
	Professor	55	1	0
	Associate Professor	61	1	0
		53	0	1
Department				
	Natural Sciences			
	Rank & Title *	Age *	Eligible *	Ineligible *
	Professor	68	1	0
		65	1	0
		61	1	0
		59	1	0
		57	0	1
		47	0	1
	Associate Professor	70	1	0
		65	1	0
		59	1	0
	Assistant Professor	58	0	1
		57	0	1
		52	0	1
Department				
	Psychology			
	Rank & Title *	Age *	Eligible *	Ineligible *
	Professor	60	0	1

		59	0	1
		45	0	1
	Associate Professor	63	1	0
		52	0	1
Department				
	Social Science			
	Rank & Title*	Age*	Eligible*	Ineligible*
	Professor	55	0	1
		54	1	0
		52	0	1
	Associate Professor	53	0	1
		44	0	2
		43	0	1
Administrators				
	Rank & Title*	Age*	Eligible*	Ineligible*
	Professor & Chancellor	59	0	1
	Prof/VC for Aca Affairs	55	0	1
	Prof/Assoc VC for Aca Aff	51	0	1
	Assoc Prof/Asst. VC for AA	56	0	1
	Prof/Asst VC for A Plan/Stu	47	0	1
Institutional Grand Total			48	63

**This table is based upon current institutional information. However, if any error or omission is detected, it should be promptly reported to the appropriate academic department or school. Faculty are individually responsible for providing age and service data needed to determine their Program eligibility.

**In order to participate in the Phased Retirement Program, tenured faculty holding administrative positions must resign those positions. Such persons will be compensated at 50% of a

salary equal to 9/12 of the salary received during the last twelve-month term of employment incident to full-time service.

Guideline 5

Duration of Phased Retirement Participants

Participation by faculty members in the phased retirement program shall be for two (2) years. Upon mutual agreement by all parties, a faculty member may be allowed to terminate participation prior to the end of the two-year period.

Guideline 6

Institutional Measures to be Taken to Inform Eligible Faculty of Program

The Provost will notify in writing, no earlier than February 1 annually, those tenured faculty who appear to meet the age and service requirements for eligibility on or before August 1 annually. The faculty identified will be sent a letter announcing the phased retirement program and the following materials:

- C "Summary: University of North Carolina Phased Retirement Program"
- C "University of North Carolina Phased Retirement Application and Reemployment Agreement"
- C "University of North Carolina Phased Retirement Program General Release"
- C List of individuals, by faculty rank, who appear eligible or ineligible to participate in the Program.

Annually in September, the Provost shall send to each eligible faculty member (one who will meet the age and service requirements by the following August 1) a letter announcing the phased retirement program and a summary of the UNC Phased Retirement Program. In addition, the university will provide e-mail and hardcopy announcements of two group informational meetings to be held in September of each year. Throughout the year, individual consultations will be arranged through the Office of Human Resources to explain the details, benefits, timetable and procedures for the program. Brochures and leaflets will be developed to inform faculty about the program. This

information will be available in all department offices. A committee will be established to carry out the functions of developing an agenda for and implementing the group meeting, and creating the brochures/leaflets. The membership of the committee shall consist of staff from the Office of Human Resources, selected members of the Faculty Welfare Committee of the Faculty Senate, and a representative from the Office of Academic Affairs.

Guideline 7

Procedure for Receiving, Reviewing, and Approving Applications

Eligible faculty members will be invited to attend an informational meeting on or about September 1 of each year. At this meeting the UNC Application and Release Packages for the program will be made available and will remain available to faculty for pick up in the Human Resources Office until October 1. After the informational meetings eligible faculty members should arrange to meet with their departmental chairs and deans to discuss their interest in participating in the Phased Retirement Program. During these initial meetings, eligible faculty members should discuss their intent to participate in the program, the potential limits on participation for faculty members in the program area, the formal application process, etc.

Assuming that the university's 20% program area cap has not been met, interested, eligible faculty members should discuss with their chairs and deans the initial details of their half-time work plan. Once a preliminary half-time work plan has been agreed upon, based on departmental needs and schedules, the details of the plan are to be submitted to the office of the respective dean by the chair for preparation of:

- 1) the official University of North Carolina Phased Retirement Application and Reemployment Agreement (Agreement)
- 2) the General Release (Release).

The eligible faculty member will be provided a completed Application and a completed Release to consider and sign. The faculty member will have at least forty-five (45) days to return the

Agreement and Release.

Once signed by the faculty member, the Agreement and Release must be reviewed and signed by the chair, the dean, and the Vice Chancellor for Academic Affairs. Persons electing to participate in the program also have the right to revoke the Agreement and the Release anytime within seven (7) days of the date they are fully executed by the parties. Revocation must be made in writing to the Office of the Provost and Vice Chancellor for Academic Affairs.

Guideline 8

The Half-Time Work Plan

The half-time work plan for the institution may include the complete range of faculty activities. The university is concerned about the effect of assigning non-student credit hour generating activity as the half-time work plan and has established priority work plans to be considered by eligible faculty and departments. In second, third, and fourth priority work plans, the department chair and faculty member shall detail specific tasks and deadlines.

C First Priority Work Plan (50% teaching) - teaching twelve semester hours per year with no advisement or committee responsibilities. If a class identified in the work plan should fail to materialize, another class or other duties will be assigned as determined by the department, e.g., curriculum development/review or self-study responsibilities. All activities associated with teaching, that is, office hours for student consultation, grade reports, attendance reports, student course evaluations, etc., will be required of faculty participating in this work plan.

C Second Priority Work Plan (25% university service) - special university service assignments in academic program areas, e.g., program review and assessment, developing a database of graduates, conducting follow-up studies, developing on-line courses, heading accreditation efforts, directing externally funded projects, recruitment initiatives.

C Third Priority Work Plan (25% university research) - specialized faculty/student research

initiatives such as theses, dissertations, undergraduate research council presentations, laboratory studies.

C Fourth Priority Work Plan (25% in each of two of the three plans above) - a combination of the previous priority work plans. While the committee on phased retirement will present the variety of institutional work plan options to the eligible faculty member, the department chair and the faculty member must mutually agree on the work plan and the time frame for the execution of the work plan.

If the university determines a critical need, a work plan may be allowed to include a larger percentage of university research and/or service.

Guideline 9

Institutional Officers Authorized to Answer Questions about the Program

C Mr. Leonard Covington, Office of Human Resources, 218 Collins Building, (910)672-1146

C Ms. Wilma Thorpe, Office of Human Resources, 219 Collins Building, (910)672-1146

C Dr. Marion Gillis-Olson, Office of Academic Affairs, 228 Barber Building, (910)672-1481

These persons will be authorized to provide individual consultations and answer questions about the program.

Guideline 10

List of Benefits, Privileges and Services in Which Program Participants May Continue

See attached chart