

<p>University of Dallas</p>	<p>Human Resources</p> <p>Tenured Faculty Phased Retirement Policy</p>	<p>POLICY HR-TFPR</p> <p>Responsible Office: Human Resources</p> <p>Responsible Officer: Chief Human Resources Officer</p> <p>Approved by: President</p> <p>Issued: April 2, 2024</p> <p>Revised:</p>
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4. ELIGIBILITY

- 4.1 **Tenure status** - The faculty member must hold a tenured faculty status at the University as defined within the Faculty Handbook.
- 4.2 **Years of Service** - The faculty member must have completed no less than ten (10) years of continuous full-time employment with the University prior and up to the date of application for phased retirement.
- 4.3 **Age Limit** - The faculty member must be at least 61 years of age at the time of application to the phased retirement program.
- 4.4 **Good Standing** - The faculty member must be in good employment standing, having no pending complaints or investigations relative to violations of employment or other University policies as defined in the Faculty Handbook or Employee Handbook or as published otherwise by the University, at the time of application for phased retirement. Good standing must be maintained throughout the period of phased retirement.
- 4.5

The Provost shall develop a consultative process to review applications and shall make a recommendation to the President, who shall make the decision regarding selection.

- 5.5 **Duties** - During the transitional phasing period, the balance of duties shall shift in emphasis from teaching to scholarly and service duties. Your scholarly and service expectation will be determined collaboratively between you and your dean and will be proportional to a 75% full time equivalent (FTE) designation during the phasing period. For individuals on the one-year phase-out, the annual teaching requirement shall be 3 courses (approximately 9 credit hours). For individuals who are awarded a second year in the phase-out program, the FTE designation will remain 75%

between the two parties. Except in extraordinary circumstances, the retiree will not be eligible for full-time regular employment with the University, and in no circumstance will be eligible to regain a tenured faculty status.

8. EQUAL EMPLOYMENT

The phased retirement program is a term and condition of employment; as such, it is subject to all of the rights, duties, and responsibilities defined by the University's policy on equal employment. The provisions and requirements of that policy are incorporated herein and are applicable to all aspects of access, selection, and conduct of the phased retirement program.

9. RESPONSIBILITIES

Faculty Member	Submit application for Phased Retirement to the Provost's Office within specified application period.
Provost Office	Review application and notify faculty member of decision to approve or deny. Issue contract to a faculty member whose application was approved.
Office of Human Resources	Process new employment terms for faculty member during phase-out year(s).
Office of General Counsel	Monitor compliance with policy, in conjunction with the Provost Office.

10. POLICY ENFORCEMENT

Enforcement	The Office of the General Counsel, in concert with the Provost Office and the Office of Human Resources, will advise regarding appropriate enforcement action in accordance with University policy.
Reporting Violations	Report suspected violations of this policy to the Office of Human Resources.

11. RELATED DOCUMENTS

Policy or Document	Web Address
Faculty Handbook	https://udallas.edu/about/university-policies/index.php

12. CONTACTS

Subject	Office or Position	Telephone Number	Office Email or URL
Policy Clarification	Office of General Counsel	(972) 721-5363	hlachenauer@udallas.edu

Web Address for this Policy