Illinois Human Resources
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN

Application Form for Faculty Phased Retirement Program

Employee Information	
First Name:	Last Name:
UIN:	Email Address:
Faculty Rank:	Faculty Administrative Title (ex: Head or Director):
College Name:	Department Name:
Current Effort: Please complete the following fields to describe your overall current effort as it relates to teaching, research, service, or other duties. The percentages should total 100% and be based on the full-time position.	
Teaching Effort %: [XX%]	[description - # courses per semester, advising load, etc.]
Research Effort %: [XX%]	[description - # research projects, size of research group, expected deliverables, project dates, etc.]
Service Effort %: [XX%]	[description – committee work, mentoring, professional organizations, etc.]
Other Effort %: [XX%]	[description – other applicable activities as a faculty member]
Phased Retirement Request	
How does this phased retirement proposal benefit the institution?	
Proposed Duration (maximum up to 3 years for tenured faculty and 1 year for specialized faculty):	
Will there be summer effort performed during the phased retirement period? If so, please specify.	
Proposed Reduced FTE (by academic year, if applicable):	

Year 1: Year 2: Year 3:	
Proposed Start Date:	
Proposed End Date (suggest the 15th of the month or later due to benefit nuances):	
Proposed Reduced Effort Year 1: Please complete the following fields to propose your overall effort as it relates to teaching, research, service, or other duties during the phased retirement period. The percentages should total 100%, but the effort will be equivalent to the proposed reduced FTE level during the phased retirement period.	
Teaching Effort %: [XX%] (by year if applicable)	[description - # courses per semester, advising load, etc.]
Research Effort %: [XX%] (by year if applicable)	[description - # research projects, size of research group, expected deliverables, project dates, etc.]
Service Effort %: [XX%] (by year if applicable)	[description – committee work, mentoring, professional organizations, etc.]
Other Effort %: [XX%] (by year if applicable)	[description – other applicable activities as a faculty member]
Proposed Reduced Effort Year 2: Please complete the following fields to propose your overall effort as it relates to teaching, research, service, or other duties during the phased retirement period. The percentages should total 100%, but the effort will be equivalent to the proposed reduced FTE level during the phased retirement period.	
Teaching Effort %: [XX%] (by year if applicable)	[description - # courses per semester, advising load, etc.]
Research Effort %: [XX%] (by year if applicable)	[description - # research projects, size of research group, expected deliverables, project dates, etc.]
Service Effort %: [XX%] (by year if applicable)	[description – committee work, mentoring, professional organizations, etc.]
Other Effort %: [XX%] (by year if applicable)	[description – other applicable activities as a faculty member]
Proposed Reduced Effort Year 3: Please complete the following fields to propose your overall effort as it relates to teaching, research, service, or other duties during the phased retirement period. The	

percentages should total 100%, but the effort will be equivalent to the proposed reduced FTE level during the phased retirement period.	
Teaching Effort %: [XX%] (by year if applicable)	[description - # courses per semester, advising load, etc.]
Research Effort %: [XX%] (by year if applicable)	[description - # research projects, size of research group, expected deliverables, project dates, etc.]
Service Effort %: [XX%] (by year if applicable)	[description – committee work, mentoring, professional organizations, etc.]
Other Effort %: [XX%] (by year if applicable)	[description – other applicable activities as a faculty member]

Signatures & Approvals

Employee Signature: By voluntarily signing and submitting this application, the Employee understands and will be bound by the terms and conditions of the Faculty Phased Retirement Program for the University of Illinois upon entering an agreement, if accepted by the University. Upon approval, faculty member will be expected to provide benefits documentation to the unit HR contact.

Department & College Approval: By approving this application, the department and college indicate endorsement of the proposed phased retirement plan and that:

- It will not interfere with the ability of the unit to meet its obligations.
- The activities specified are appropriate for the level of proposed effort.
- The unit, as well as the employee, will benefit from this phased retirement plan.

If the faculty member has proposed/committed effort on sponsored funding, approval from the Office of Sponsored Programs Administration (SPA) must be secured and attached to the application.

Completed and department and college approved applications are forwarded to campus for final review. The employee will receive a Phased Retirement Agreement that formalizes the terms outlined in this application, which will be a binding agreement and will need final signatures, including Provost and IHR.

_____

Employee Name, Title Date

_____

Department Head Name, Title, Dept Date

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Dean Name, Title, College Date

In addition to the signatories above, please send a copy of this fully signed agreement to the following:

UNIT:	Names
COLLEGE/MAU:	Names
PROVOST:	Names
IHR:	Names