

2024-2027 UNC Phased Retirement Program (PRP) Department Guidelines

In a memo dated Nov. 22, 2023, the Provost provided information on the UNC-Chapel Hill 2024-2027 Phased Retirement Program (PRP) to full-time tenured faculty who appear to meet PRP age and service eligibility requirements. The PRP materials can be found on the [Phased Retirement page](#) of the HR at UNC website web.

What constitutes a Phased Retirement (PRP) application?

After receiving notification of eligibility to participate in the PRP, it is an individual faculty member's responsibility to determine whether to apply for participation in the PRP.

The application review period for faculty to apply for the 2024-2027 PRP term is Nov. 22, 2023, through Feb. 16, 2024. A faculty member is considered to have applied for the PRP when a [UNC Phased Retirement Program Application and Reemployment Agreement](#) (the "Agreement") has been submitted to the department head. This form contains:

- a. General information about the faculty member.
- b. Section to include specific work duties the faculty member will perform as a .5 FTE (half-time) Phased Retirement Program participant.
- c. Section for required approvals (the faculty requesting PRP does NOT sign the agreement at this point).

PRP Application Process

The faculty member formally applies to the PRP by submitting an unsigned UNC Phased Retirement Program Application and Reemployment Agreement (the "Agreement") directly to the department head. The department head, after conferring with the faculty member, proposes the duties for a half-time work plan during the three-year PRP term.

Development of the PRP Work Plan

An eligible PRP applicant must meet with their department head and negotiate the terms for half-time employment. A typical work plan includes services rendered over two regular-term semesters of an academic year. The work must be split over the two regular-term semesters in some percentage. Examples of effort could be 50/50, 75/25, etc. No work plan may include duties incident to summer school curricula.

The assigned duties during the PRP should be consistent with the skills and abilities of the faculty member and the objective needs of the department. The full range of faculty activities should be considered and may include teaching (undergraduate or graduate), research, creative activities, academic advising, writing of grants, publications, public service, etc. The percent of time involved will be negotiated between the faculty member and the department head as they create the PRP work plan.

The Office of Faculty Affairs reviews all PRP work plans prior to recommending them for the Provost's approval. The Office of Faculty Affairs may return any work plan for additional details. The most common reason a work plan is returned to an applicant is that it is unclear whether the effort described is half-time effort, as required. Ideal work plans include a brief description of the applicant's current responsibilities as important context for evaluating the reasonableness of the PRP work plan.

Signing the PRP Reemployment Agreement and Release

After the faculty member and department head agree upon the half-time work plan, the department head will prepare and sign the Agreement, and pass it to the dean for consideration. If approved, the dean will sign the Agreement and submit the form to the UNC Benefits Office via Senior Director Joe Williams (joe_williams@unc.edu), who will forward the form to the Office of Faculty Affairs for review and then on to the Provost for approval.

If approved by the Provost, the faculty member will receive two documents via email:

- a. Finalized and signed (by department head, dean and Provost) version of the Agreement.
- b. UNC Phased Retirement Program General Release (the "Release") to consider and sign in the presence of a Notary Public.

As required by the Age Discrimination in Employment Act (ADEA), the faculty member shall be allowed at least forty-five (45) calendar days to execute and return the Agreement and the Release. The forty-five-day period begins on the date of delivery to the faculty member, as evidenced by the date the email is sent to the faculty member.

The faculty member shall then submit the original signed Agreement and Release to the UNC Benefits Team via Joe Williams, senior director, at joe_williams@unc.edu. The final original Agreement and Release documents will be retained with the UNC Benefits Team and home HR department.

Faculty Member Option for Revocation of PRP Agreement and Release:

A faculty member electing to participate in the PRP has the right under the ADEA to revoke the Agreement and the Release anytime within seven (7) calendar days of the date both documents are fully executed by all parties. Once an application is fully executed, the commitment to enter the PRP becomes irreversible unless written revocation is initiated.

Should a faculty member wish to revoke their PRP application, a written, signed statement of intent must be submitted to the department head. The date of revocation is the date on which the faculty member physically delivers the revocation, the date on which the revocation is posted, or the post mark date. The date of receipt for postal handling shall be prima facie evidence of the date of the revocation.

If the Agreement and the Release are effectively revoked, the Agreement is void. The eligible faculty member will continue in their same full-time employment status as held immediately prior to the execution of the Agreement and the Release. The faculty member may apply for the Program in subsequent years.

Changes or Renegotiations of the PRP Work Plan

A PRP faculty member may seek to renegotiate their work plan duties with the department head. Resulting changes must be in writing and signed by the PRP participant, department head, dean, and the Provost with an effective date. A PRP participant who seeks to renegotiate their work plan is encouraged to do so at least one semester in advance of the effective date of the desired change(s).

During PRP participation, the department head retains the right to make reasonable changes in assignments to address the needs of the department that are consistent with the participant's abilities.

PRP Rights, Responsibilities, and Evaluation

Tenure

A faculty member who enters the PRP retains their professorial rank and the full range of responsibilities and rights associated with it, except for the status of permanent tenure.

Performance Reviews and Salary Increases

A PRP participant is subject to annual performance reviews and is eligible for salary increases and merit pay based on annual evaluations after the first year of PRP participation (salary increases are prohibited during the first year). In Program years two and three, a PRP faculty member in the Teachers & State Employees Retirement program (TSERS) is responsible for monitoring annual earnings limits as provided by the State Retirement System. Optional Retirement Program (ORP) retirees are not subject to earnings limitations.

A PRP participant will continue to be subject to policies, regulations, and The Code of The University of North Carolina and UNC-Chapel Hill. Participating faculty members may be placed on administrative leave with pay and/or have duties reassigned during or as a result of an investigation or disciplinary action.

Participation in this Program shall not provide a faculty member with greater rights, claims, or privileges against UNC-Chapel Hill or the University of North Carolina regarding continued employment than otherwise provided in the policies, regulations, and The Code of The University of North Carolina and UNC-Chapel Hill.

PRP Application Periods and Deadlines

The application period begins Nov. 22, 2023, and ends Feb. 16, 2024. **Friday, Feb. 16, 2024, at 5 p.m.** is the deadline for submitting the PRP Agreement signed through the department head and dean levels for Provost consideration.

For questions, reach out to Joe Williams, senior director of benefits, leave administration and Total WellBeing, at joe_williams@unc.edu.