**Faculty Application for Phased Retirement (12 Month Appointments)**

Procedure: Complete the application and forward to the department chair and dean for their review and endorsement.

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Department\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phased Retirement FTE Requested (minimum = 25%; maximum = 50%):\_\_\_\_\_\_\_\_\_\_\_

Phased Retirement Length Requested (maximum of three years): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phased Retirement Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phased Retirement End Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**I. Current Allocation of Effort and Responsibilities**

A. Specify how your current 1.0 FTE is allocated to teaching, research, and service.

Teaching FTE\_\_\_\_\_\_\_\_ Research FTE:\_\_\_\_\_\_\_\_ Service FTE:\_\_\_\_\_\_\_\_\_\_

B. Provide a description of the activities that you currently complete in teaching, research, and service to meet your 1.0 FTE. Address the number of courses taught each semester, research projects and output, and service activities (e.g., department, school, university, professional).

Teaching:

Research:

Service:

**II. Phased Retirement FTE and Responsibilities**

Describe how your proposed FTE will be allocated to teaching, research, and service during the fall and spring semesters each year of your period of phased retirement. The effort allocated to teaching, research and service may be different in each semester as long as the total semester effort meets your phased retirement FTE. A sample plan for .50 phased retirement FTE is provided below for a faculty member whose .40 teaching effort on a full-time appointment (40% teaching, 40% research, 20% service) involves teaching two classes each semester:

**Sample Plan for .50 FTE each semester:**

Fall Semester Allocation of Effort and Description of Plan: Year 1

Teaching FTE: 40% Research FTE: 5% Service FTE: 5%.

Teaching: I will teach two courses, one required undergraduate course and a graduate seminar. I will also continue to advise graduate students, serve on committees, etc. Research: I will revise a completed manuscript and prepare for my presentations at a national conference. Service: My service effort will include participation in faculty meetings, service on department committees, and my ongoing professional service on a journal editorial board and to my professional organizations.

Spring Semester Allocation of Effort and Description of Plan: Year 1

Teaching FTE: 5% Research FTE: 40% Service FTE: 5%

Teaching: I will work one-on-one with graduate students on independent studies, dissertations, etc., and serve on graduate student examination and dissertation committees. Research: The majority of my time in the spring semesters will be devoted to my ongoing research project on XXXX, including collection of new data, data analysis, and preparation of manuscripts. Service: My service in the spring semesters will be similar to my service in the fall semesters.

### Proposed Plan for Phased Retirement:

### Fall Semester Allocation of Effort and Description of Plan: Year 1

### Teaching FTE:\_\_\_\_\_\_\_ Research FTE: \_\_\_\_\_\_\_\_\_ Service FTE:\_\_\_\_\_\_\_\_

### Spring Semester Allocation of Effort and Description of Plan: Year 1

### Teaching FTE:\_\_\_\_\_\_\_ Research FTE: \_\_\_\_\_\_\_\_\_ Service FTE:\_\_\_\_\_\_\_\_

### Fall Semester Allocation of Effort and Description of Plan: Year 2

### Teaching FTE:\_\_\_\_\_\_\_ Research FTE: \_\_\_\_\_\_\_\_\_ Service FTE:\_\_\_\_\_\_\_\_

### Spring Semester Allocation of Effort and Description of Plan: Year 2

### Teaching FTE:\_\_\_\_\_\_\_ Research FTE: \_\_\_\_\_\_\_\_\_ Service FTE:\_\_\_\_\_\_\_\_

### Fall Semester Allocation of Effort and Description of Plan: Year 3

### Teaching FTE:\_\_\_\_\_\_\_ Research FTE: \_\_\_\_\_\_\_\_\_ Service FTE:\_\_\_\_\_\_\_\_

### Spring Semester Allocation of Effort and Description of Plan: Year 3

### Teaching FTE:\_\_\_\_\_\_\_ Research FTE: \_\_\_\_\_\_\_\_\_ Service FTE:\_\_\_\_\_\_\_\_

Applicant Signature

### \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

### Signature Date

**Phased Retirement Application Review and Endorsements**

**Chair Review:**

I have reviewed this phased retirement plan. By my signature, I indicate my endorsement of the plan and that:

1. It will not interfere with the ability of the department to meet its obligations to students.
2. The activities specified are appropriate for the level of effort.
3. The department as well as the faculty member will benefit from the phased retirement.

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Signature Date

Name (please print)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Dean Review:**

I have reviewed this phased retirement plan. By my signature, I indicate my endorsement of the plan and that:

1. It will not interfere with the ability of the department and school/college to meet its obligations to students.
2. The activities specified are appropriate for the level of effort.
3. The department and school/college as well as the faculty member will benefit from the phased retirement.

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Signature Date

Name (please print)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Forward the completed forms to:

Office of the Provost

Vice Provost for Faculty Development

Campus

Or email facultydev@ku.edu

After review and approval by the Vice Provost, applicants will receive a Phased Retirement Agreement that formalizes the terms of the phased retirement as outlined in this application.