The Plant Operations Phased Retirement is based on the University of Michigan Standard Practice Guide (SPG) number 201.83 Section III-Regulations, Letter B-Phased Retirement. This policy is designed to ensure that this University benefit is administered fairly and equitably to all eligible employees, and that the Executive Director reviews and approves Phased Retirement Plan requests. To be eligible for a Phased Retirement Plan, the following criteria must be met:

- A written request must be submitted one year prior to the start date.
- The request should be for at least a 40% appointment unless otherwise approved by department Associate Director/Manager and the Executive Director.
- Agreements shall not be made for more than one year at a time. The agreement can be renewed annually through a new written request and must have the approval of the department Associate Director/Manager and the Executive Director.
- An employee must be in good standing before consideration for Phased Retirement.
  a) The supervisor will review the requestor's attendance record for the previous two years. (An acceptable level of absence for purposes of this procedure is defined as less than 12 days taken during the preceding 12-month period for a FTE and a prorated 12 days for an individual on partial assignment, for example, less than 6 absences for a 50% appointment. Vacation should not be considered in the evaluation of absences. Special circumstances may be considered.
  b) Requestor cannot have any disciplinary actions on file against him/her for the two years prior to the date of submission.
- Requester cannot be on Worker’s Compensation, but may request consideration after fully returning to work.

The items above represent the minimum required criteria to be met by the Plant Operations’ employee for consideration of a Phased Retirement plan. Additionally, prior to approval of the Phased Retirement request, the department supervisor must submit a justification letter in writing on behalf of the requestor to the Associate Director/Manager outlining the following:

- A description of the economic benefit and/or disadvantage to the department/shop for the granting of the approval of the request. If disadvantages are identified, a management plan addressing these issues must be included with the formal request.
- A description of items such as overlap with new employees for training, the difficulty of finding acceptable replacements, short-term increases in workload, etc.
- Attach a signed copy of the agreement outlining the requestor’s specific plan.
- Attach copies of FMS attendance reports showing all absenteeism for the previous two years to verify that all attendance requirements are met.
- Send the Phased Retirement request packet to the Executive Director’s office for final review and approval.

For more information on retirement, log on to the SPG website at: http://spg.umich.edu/