English Department
Phased Retirement Guidelines
[Approved 3/4/2013]

When a faculty member retires from regular full-time (tenured) status at Marquette University, she/he must surrender tenure. When surrendering tenure, a faculty member may choose from two options: full retirement or phased retirement. If a faculty member opts for phased retirement (limited to 3 years), then the following guidelines must be followed.

University Guidelines
The intent of the policy is that a faculty member continues to work half time at the University. Information on phased retirements may be found on the Provost’s website:

College of A&S Guidelines
Currently, college guidelines are under development, with the understanding that each department has unique expectations for faculty teaching and research.

English Department Guidelines
The intent of these guidelines is to specify phased retirement policy information appropriate to the English Department.

(1) Status as Part-time Participating Faculty. When entering phased retirement, a faculty member surrenders tenure and regular tenured faculty status and assumes, instead, a status equivalent to that of part-time participating faculty.
   (a) A faculty member in phased retirement is paid at 50% of the base salary of his/her final year as a regular tenured faculty member plus $14,400.
   (b) According to department bylaws, a faculty member with part-time status cannot vote on department initiatives.
   (c) A faculty member in phased retirement may attend department meetings as he/she chooses.
   (d) Otherwise, a faculty member has the same rights, benefits, duties, and responsibilities (including regular review of teaching) as other members of the Part-Time Participating Faculty.

(2) Application Instructions: To apply and be approved for phased retirement, a faculty member is required to negotiate proposed duties and responsibilities with the department chair and then submit a written proposal to the chair. Proposed duties and requirements must be approved by both the department chair, the dean, and provost.

(3) Deadlines for Submitting Phased Retirement Proposals.
   (a) Dec. 1, 4:30 pm, is the deadline for surrendering tenure for the next academic year and, thus, for submitting a phased retirement proposal

(4) Duties & Responsibilities. Duties and responsibilities negotiated for a phased retirement agreement must include 12 hours for an academic year—i.e., according to university policy, no fewer than 6 hours of work for fall semester and 6 hours of work for spring semester. Each year, the duties and responsibilities must include teaching 2 courses (6 hours); the other 6 hours negotiated may include a combination of
continued teaching, research, supervision of graduate students, administration of programs, etc.

(5) **Presence on Campus.** A faculty member is expected to be present on campus during both semesters, teaching and performing service and/or research. This is a university guideline and not negotiable.

(6) **Teaching Load Baseline.** The baseline for the number of courses taught will normally be set relative to the last year of full–time teaching, at the 50% level. For a faculty member who during the last full year of regular teaching has a teaching load of 2-2 (as determined by the most recent round of departmental 2-2 evaluations), the phased retirement teaching load would be 1-1; for a faculty member who during the last full year of regular teaching has a teaching load of 3-2 (as determined by the most recent round of departmental 2-2 evaluations), the phased retirement must be at least 1-1 if a research agenda is proposed or at least 2-1 if no research agenda is proposed.

(7) **Teaching Assignments.**
   (a) Courses assigned to a faculty member are those that she/he would normally teach; the assignment of new courses would be exceptional.
   (b) Course assignments may include undergraduate and/or graduate level courses as well as online or hybrid courses.
   (c) Courses assigned should meet the department needs. While every effort will be made to develop the teaching schedule for a faculty member in phased retirement during the regular schedule of course assignments, courses assigned in any given year may change if department needs change.

(8) **Offices.** A faculty member will normally retain access to his/her office and computer.

(9) **Work with Graduate Students.**
   (a) A faculty member may continue to direct graduate students and serve on M.A. Exams, DQE committees, and dissertation committees.
   (b) A faculty member will not be eligible to apply for RA assistance.

(10) **Service Assignments.** Normally, significant committee assignments will not be made.

(11) **Emeritus/a Status.**
   (a) Applications for emeritus/a status should normally be made in the same academic year in which the application for Phased Retirement Benefits is made. The Chair will notify the Dean’s Office in early January, and dossiers are due early February:
   &lt;http://www.marquette.edu/provost/documents/PromotionandTenureCalendarDeadlinesfor2012-13.pdf&gt;
   (b) If granted, emeritus/a status becomes effective immediately.

(12) **Moving from Phased to Full Retirement.**
According to the present university guidelines, a faculty member in phased retirement may switch to full retirement at the end of any academic year; however, notifying the chair about the faculty member’s decision to move from phased retirement to full retirement should occur in a timely fashion, preferably in early spring so that hiring plans for the subsequent academic year may be initiated.