

UC San Diego

Pathways to Retirement Form

Today's Date:	Projected Retirement Date, up to 2 yrs out:	Division/Unit:
Current Faculty Appointment:		
Last Name:	First Name:	MI:
Employee ID Number:	Title:	
Department:	Daytime Telephone:	
Dept. MSO/DBA:	Contact Email	
Requested Teaching Schedule Modification: (if N/A, leave blank)		
Requesting modified teaching for up to one year before retirement:	Yes	No
Reason/Details of Request:		
Department Chair Support for Request:	Yes	No
Department Chair Rationale/Endorsement:		
Requested Academic Review Deferral: (if N/A, leave blank)		
Requesting deferral of academic review due to impending retirement:	Yes	No
Last Review Effective Date, Projected Review Effective Date:		
Department Chair Support for Request:	Yes	No
Department Chair Rationale/Endorsement, if applicable:		
Requested Summer Salary for Specific Research or Assignments: (if N/A, leave blank)		
Requesting summer ninths before retirement?	Yes	No
Reason/Details of Request:		
Department Chair Support for Request:	Yes	No
Department Chair Rationale/Endorsement:		
Requested Continued Use of Office or Current Lab Space: (if N/A, leave blank)		
Requesting continued use of office or current lab?	Yes	No
Reason/Duration/Details of Request:		
Department Chair Support for Request:	Yes	No
Department Chair Rationale/Endorsement:		
Requested Pre-Retirement Recall Agreement: (if N/A, leave blank)		
Requesting Recall to Active Duty agreement?	Yes	No
AY Years/Quarters/Course Titles and Course loads of Request:		

Department Chair Support for Request:	Yes	No
Department Chair Rationale/Endorsement:		

CERTIFICATION OF PATHWAYS APPLICANT:

- I certify that I have submitted an irrevocable letter of separation, confirming the projected retirement date indicated above..
- I certify that it is my intent to perform all duties pre and post retirement this agreement stipulates to the best of my ability.
- If this box is checked, I authorize my email header accompanying this application to serve as my signature and date of application. If not, I will send a signed copy.**

Applicant Signature

Date

APPLICATION ENDORSEMENT AS PROPOSED, WITH RESTRICTIONS NOTED ABOVE:

Department Chair Signature

Date

Divisional Dean Signature

Date

If this application has chair's and dean's endorsement and requests no additional funds or space from the Associate Vice Chancellor for Resource Administration the divisional dean's office may route a copy of this ratified agreement to its Academic Personnel Services analyst for storing in the candidate's personnel file.

If additional funds or space are requested from the Office of the Executive Vice Chancellor for Academic Affairs, please fill out the below as well, submit to your analyst, and APS will submit your additional request/s for approval.

Please Detail Expense Related to Financial Support Requested:

Expense Information			
	Description of Expense	Term	Rate/Total Amount
1.			
2.			

Please Detail Descriptions of Space/Financial Support Requested from Assoc. Vice Chancellor for Resource Administration below, if any.

New Space Request Information		
	Rationale for New Space Need	Term/Duration
1.		
2.		

OUTCOME: Per review by the Associate Vice Chancellor for Resource Administration

- Request Approved Request Declined, Funding Not Available
- Request Declined Reason: _____
- Request Modified: _____

Associate Vice Chancellor for Resource Administration

Date

Pathways to Retirement Plan Approval Process

To initiate a Pathway to Retirement Agreement, a Faculty Member planning to retire:

- Expresses an interest in creating an individual Pathways to Retirement plan with their Department Chair
- Establishes a specific retirement date up to 2 years in the future
- Consults with their Department Chair to develop a plan of research, teaching and service prior to separation

Possible components of plan (contingent on department and divisional support available) may include:

- a modified teaching schedule for up to one year;
- a deferral of an upcoming review (which could otherwise entail augmented teaching or service responsibilities);
- summer ninths for specific research or assignments performed;
- office or laboratory space, or some other benefit
- if the faculty member is at least 60 years of age with at least 5 years of UCRP service credit, these conversations may also include consideration of a pre-retirement Recall agreement if department curricular needs are in alignment with such requests.

Before sending an endorsed plan forward, the Department Chair:

- Reviews, in entirety, the proposed plan with the faculty member
- Endorses the proposed plan, if agreement is in the best interest of department
- Consults with the dean to informally confirm divisional contributions

Once the chair has confirmed details, the Department/Unit AP staff:

- Completes the Pathways to Retirement Request Form for Candidate's and Chair's signature
- Secures these signatures
- Routes the signed application to the Divisional Dean's Office for review

Upon Receipt of the endorsed plan, the Divisional Dean:

- Reviews the plan and consults with the Assistant Dean regarding any requested divisional funds (e.g. TEMP FTE)
- Approves the agreement as the approval authority if no funding (e.g. TEMP FTE) or new space allocations are requested from the Associate Vice Chancellor for Resource Administration/EVC's Office
- If plan has been approved with no requests of the EVC's Office, simply forwards a final copy of form, along with a copy of the faculty member's irrevocable letter of separation to the divisional analyst at Academic Personnel Services (APS) as a Post Audit file.

When the plan is endorsed by the Divisional Dean, but additional asks are made:

- The divisional analyst at Academic Personnel Services receives and reviews the form and attachments to ensure all else is complete and routes a copy to the Associate Vice Chancellor for Resource Administration.
- The AVC-RA approves or declines any documented requests for additional support and returns a signed copy of the form to Academic Personnel Services
- Upon receipt of this, the divisional analyst at APS then provides the complete copy to the divisional dean's office for distribution to the department and faculty member and saves the final agreement in APS central office files.