

## T2RP Participation Request Form

Any in-unit faculty member applying for this benefit must be instructional, E&G-funded, and eligible for retirement. Request for participation must be submitted no later than February 1 preceding the beginning of employee's desired participation in T2RP on August 8th of the next academic year. Retirement is effective at the end of T2RP year(s).

**Part 1: Employee completes top half of this form, then submits to supervisor via email by February 1**

Name: \_\_\_\_\_ Employee ID (7-digit number): \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_ Age at start of T2RP (age on August 8): \_\_\_\_\_  
 Retirement date: May 7, 20\_\_\_\_ College/Division: \_\_\_\_\_

*If applicable:*

Date of return from last paid parental leave: \_\_\_\_\_  
 Date of return from last sabbatical or last professional development leave: \_\_\_\_\_  
 Date of return from last administrative professional development leave: \_\_\_\_\_

**Employee's desired assignment distribution for T2RP (include teaching, research, and service allocation):**

T2RP Year 1 (FTE* = _____)	T2RP Year 2 (if applicable, FTE = 0.50)
Teaching: Research: Service:	Teaching: Research: Service:

*\*FTE in Year 1 must be at least 0.50 and may not exceed 0.75; FTE must be 0.50 if T2PR participation is for only 1 year.*

Name of Immediate Supervisor: \_\_\_\_\_ Date application provided to supervisor: \_\_\_\_\_

**Part 2: Supervisor completes this portion, routes to dean's office via email; copy to employee**

**Assignment distribution during T2RP. Include number of classes as well as research and service allocations per semester.**

T2RP Year 1 (FTE = _____)	T2RP Year 2 (if applicable, FTE = 0.50)
Fall 20_____   Spring 20_____ 	Fall 20_____   Spring 20_____ 

1. Dean/designee indicates acknowledgment of this document by indicating approval status (contingent upon eligibility) and forwarding supervisor's email to college HR representative.
2. College HR representative verifies with UCF HR Benefits that employee will be eligible to retire after T2RP and submits copy to [benefits@ucf.edu](mailto:benefits@ucf.edu) with copies to employee, employee's supervisor, and dean.
3. Job Change will be created in Workday and submitted through the usual process by the college. (Note that a termination action in Workday will be needed 90 days before the stated retirement date.)
4. Employee receives new employment agreement indicating end of contract (retirement date) and reduced FTE.
5. Employee must meet with a UCF HR Benefits representative at least 90 days before the stated retirement date.

## **Relevant excerpt from 2018-2021 BOT-UFF Collective Bargaining Agreement:**

**24.10 Transition-to-Retirement Program.** The UCF Transition-to-Retirement Program (T2RP) allows eligible employees to request a planned transition to retirement by reducing their assigned FTE over a period of one or two consecutive academic years while their department or unit continues to benefit from their effort and experience. The T2RP is voluntary for the employee and subject to agreement in advance with the department or unit head about assigned duties and FTE. T2RP provides reduced duties for one or two consecutive academic years with compensation each academic year commensurate with the FTE assigned for that academic year. At UCF, each academic year begins on August 8 and ends on the last day of the spring semester (either May 6 or May 7).

Participants in T2RP are not yet retired but rather are transitioning toward retirement in a planned manner that benefits the employee and the University. The period of T2RP participation is governed by all provisions of this Agreement, including Articles 12 (Non-reappointment), 15 (Tenure), 16 (Discipline), and 17 (Leaves). T2RP participants retain their tenure, if applicable, as well as most other rights and responsibilities, such as accrual of sick leave, of employees with the same FTE.

(a) Eligibility. Employees who have received notice of non-reappointment, layoff, or termination, or who have already retired, including participants in the State's Deferred Retirement Option Program (DROP) or in the PRP, are not eligible to request participation in T2RP. Employees who are returning from a leave, such as a sabbatical, professional development leave, or paid parental leave are ineligible to participate in T2RP until they have served the appropriate amount of time in a full-time appointment.

(1) Full-time, nine-month and 12-month instructional E&G employees who have been employed full-time at UCF for the previous five academic years and who would otherwise be eligible to retire in their respective retirement plan upon completion of the T2RP program are eligible to participate in T2RP.

(2) Employees who desire to participate in T2RP must concurrently submit their written request for T2RP participation and retirement/resignation paperwork. This request for participation must be submitted no later than February 1 preceding the beginning of their desired participation in T2RP for the next academic year; the retirement/resignation date specified must be the last day of the spring semester of the next academic year or of the following academic year. The employee and the department or unit head shall have three months, or until May 1, whichever occurs later, to determine whether an agreement for reducing the employee's assigned FTE can be reached. If, after a reasonable good faith consideration of all factors, an agreement cannot be reached for a reduced FTE assignment, an employee may not be eligible to participate in T2RP as requested. If an agreement cannot be reached for a reduced FTE assignment, the employee shall not be eligible to participate in T2RP as requested. However, if the employee remains employed in the same position at UCF and eligible to request participation in T2RP, their T2RP request may be resubmitted in a future year.

(3) The decision to participate in the T2RP is irrevocable after the required approval document has been executed by all parties.

(b) Program Provisions. All participants in T2RP must retire or resign at the end of their participation in T2RP. A planned date of retirement/resignation, which shall not be extended, must be submitted by the employee when requesting participation in T2RP. On the date of retirement/resignation, the employee relinquishes all rights to tenure, if applicable. Participants' retirement benefits shall be determined upon retirement, as provided under Florida Statutes and the rules of the Division of Retirement.

(1) FTE During T2RP Participation. The reduced FTE in the first academic year of participation in T2RP can be no greater than 0.75 and no less than 0.50, and the reduced FTE in the final academic year of participation in T2RP, whether the final year is the first or second year, shall be 0.50.

(2) Released Time. While participating in T2RP, employees may use released time from contracts or grants to fulfill a portion of their assigned FTE as a buyout, subject to the approval of the department or unit head. No other released time may be used to fulfill or buyout any portion of a participant's assigned FTE.

(3) Summer Appointment. Employees participating in T2RP for two consecutive academic years may be offered a supplemental summer appointment between the first and second years of their T2RP participation. Alternatively, a participant may use funds from contracts and grants for a summer contract. Regardless of the source(s) of summer funding, the total FTE for the summer appointment shall not exceed the assigned FTE in either of the two years of T2RP participation. For example, a participant with 0.65 FTE for the first year in T2RP may not have a summer appointment that exceeds 0.65 FTE.

(4) Eligibility for Leave. While participating in T2RP, an employee is not eligible to apply for nor to take a sabbatical, professional development leave, unpaid personal leave, paid parental leave, or an administrative professional development leave.

(5) Resignation/Retirement During T2RP. A T2RP participant who wishes to terminate his/her T2RP agreement by resigning or retiring prior to the agreed upon ending date has the professional obligation, whenever possible, to provide the University with sufficient notice of his/her retirement or resignation to avoid scheduling and classroom disruptions. If the participant has a funded research assignment only, he/she has a professional obligation to provide a minimum of one full semester's notice prior to their resignation or retirement.

(6) Employees are encouraged to contact HR to review potential impact to their insurance premiums during T2RP.