

SAMPLE PHASED STAFF RETIREMENT PROPOSAL

A well written proposal lays out a plan for Phased Retirement implementation that should be acceptable to all affected parties (supervisor, staff member and colleagues).

To: Supervisor's name
From: Your name
Re: Proposal for Phased Retirement
Date: Date

As a staff member of (name of division or department) for (X) years, I propose adjusting my work plan to incorporate Phased Retirement. I have considered the needs of our (department/office/unit/etc.) and the expectations of my position and have identified several potential benefits to this arrangement:

- Highlight opportunities for improved cost effectiveness and customer satisfaction, where possible.

I believe that this will be a successful arrangement because:

- Describe aspects of the job that make this option feasible
- Describe the way this arrangement will meet the needs of the organization, supervisor, colleagues, and customers.

This arrangement will be most successful if we:

- List opportunities for enhanced communication and management of work.

I feel that my work record as a (personal characteristic(s)* needed to implement arrangement) staff member will support this arrangement. To further ensure success, I plan to:

- Discuss specific plans for implementation.

(*i.e.: self-directed, goal oriented, self-disciplined, reliable, independent, hard-working, etc.)

I'm proposing a period of Phased Retirement that begins on (begin date) and ends on (end date).

I would like to discuss this proposal with you further and address any concerns that you may have. I understand that you are responsible for the success of this organization and must determine whether or not this plan fits appropriately within the goals for the (department/office/unit/etc.).