
NARA NOTICE

2015-

Date: September 16, 2015
To: All employees
Subject: Phased Retirement Open Season

As some of you may know, the Office of Personnel Management (OPM) introduced an arrangement for Federal employees called “phased retirement” as a tool that agencies can use in succession planning and employees can use to ease into retirement. (Phased retirement is designed to allow agencies to prevent a rapid exodus of staff with specialized knowledge.)

NARA hopes to build a phased retirement program into our succession planning, and we will begin by providing eligible employees with the opportunity to be part of our pilot program in 2016. Employees who meet the requirements set by OPM and outlined in NARA’s policy may apply to be part of the inaugural group of phased retirees at NARA.

While the intent of the program is to provide agencies with a transition tool, this is also an opportunity for employees to move to the next stage of life. Phased retirement will enable an employee to ease into retirement while sharing his/her skill set and knowledge with the next generation of agency experts.

Eligible employees will be considered for the program using a business-based criteria assessment, outlined in NARA policy. To be eligible for phased retirement, employees must:

- have worked full time continuously for the last three years prior to entering the program
- be eligible for voluntary optional retirement
- meet age and years of service requirements of the retirement system (CSRS or FERS)

Employees seeking to enter phased retirement must go through an application process. If accepted into the pilot program, you must sign an agreement with NARA and serve 20 percent of your time as a mentor, sharing your knowledge to other employees. Phased retirees will work half time schedules during the transition. For example, if you currently work 40 hours per week, you would work 20 hours per week while in phased retirement.

Beginning September 18, 2015, employees may work with the Benefits team to obtain retirement estimates for application to the program, check eligibility, and have questions answered before applying. Open season for phased retirement applications will run from September 18 through October 19, 2015.

At this time, NARA is one of only a handful of federal agencies participating in the phased retirement program. NARA is collaborating with other similar agencies, as well as AFGE Council 260 and members of management, to come up with a plan within the next year for making this an effective avenue for transition into retirement.

Contact the Benefits team for estimates and application materials at phasedretirement@nara.gov. Also, refer to the Employee Relations and Benefits Branch (HPE) webpage for more information and application materials.