
NARA NOTICE

2015-

Date:
To: All Employees
Subject: Phased Retirement Open Season

As some of you may know, the Office of Personnel Management (OPM) has 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 over the next year.

Phased retirement is designed to allow agencies to prevent a rapid exodus of staff with specialized knowledge. As a result, NARA hopes to build a phased retirement program into our succession planning, and we will begin by providing eligible employees the opportunity to be part of our pilot program in calendar year 2016. NARA has collaborated 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. At this time, NARA is one of only a handful of federal agencies participating in the phased retirement program.

Employees who meet the requirements set by OPM and outlined in NARA’s guidance 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.

To be eligible for phased retirement, employees must have worked full time continuously for the last three years prior to entering the program. Also, you must be eligible for voluntary optional retirement (regular retirement), and meet age and years of service requirements of the retirement system (CSRS or FERS) you are under. Eligible employees will be considered for the program using a business-based criteria assessment, outlined in NARA policy.

Those individuals 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, and spend at least 20% of your time in a mentoring capacity.

Beginning September 18, 2015, employees may work with the [Benefits team](#) to obtain retirement estimates to see how much they will get under phased retirement, check eligibility, and have questions answered before applying. Open season for phased retirement applications will run from September 18 through October 19, 2015.

Contact the Benefits team for estimates and application materials at phasedretirement@nara.gov. Also, refer to the [HTL webpage](#) for more information and application materials.