

SUPPLEMENT 2015-02

Between the

U.S. Department of Housing & Urban Development

Region IX

And

National Federation of Federal Employees

Local 1450

SUBJECT: PHASED RETIREMENT PILOT PROGRAM (PRP)

1. Non-temporary, retirement eligible BUES who meet all of the following CSRS or FERS requirements for retirement benefits may request to enter the phased retirement pilot program:
 - a. Must have been employed, on a full-time basis at HUD for not less than the 3-year period preceding the effective date of his or her entry into phased retirement status as stated in 5 CFR §848.201.
 - b. Must be an employee in the Civil Service Retirement System (CSRS) or the Federal Employees Retirement System (FERS), who is eligible for immediate retirement AND meet the provisions of the implementing regulations. This program limits participation to:
 - i. CSRS employees who have at least 30 years of service and have attained at least age 55 or have at least 20 years of service and have attained at least age 60 (5 U.S.C. 8336a(a)(9)).
 - ii. FERS employees who have at least 30 years of service and have attained at least their Minimum Retirement Age (MRA), between ages 55-57, or have at least 20 years of service and have attained at least age 60 5 U.S.C. 8412a(a)(9).

2. A denial of an employee's application for phased retirement may be grieved under Article 9 of the LMA.
3. Approval authority is delegated to the General Deputy Assistant Secretary (GDAS) or equivalent position for the program office. However, all requests must be submitted to the immediate supervisor. Approval is determined individually according to the facts of the particular situation. The approving official will approve or disapprove the employee's participation in the program in writing, within 10 business days of receipt of a complete application package, unless extenuating circumstances preclude processing within this period. An employee will be notified in writing of any delay in processing due to extenuating circumstances (e.g., the supervisor is on leave, travel, and/or higher management level approval of the request is required). Provide written explanation to the employee, if the request to participate is denied.
4. Consideration of an employee's request to enter the phased retirement program will be based on the merits of the application. The criteria for approval for the PRP are as follows:
 - a. The employee must have achieved a minimum rating of fully successful on their most recent annual performance evaluation.
 - b. The requesting employee must submit a completed, signed agency time limit and mentoring agreement.
 - c. The operational needs of the unit do not require the employee to work in excess of a part-time (50%) work schedule.
 - d. The staffing level is sufficient to accommodate the part-time work schedule of the phased retiree.
 - e. The employee has expert knowledge and/or skills essential to the organization and mission that need to be conveyed to others.
 - f. The employee is capable and willing to be a mentor.

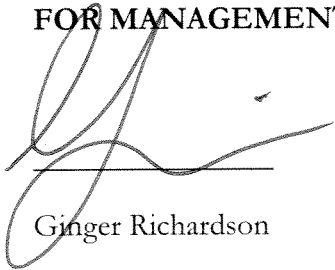
- g. The employee has not previously entered phased retirement. (**Note:** An individual may only enter phased retirement once.)

If more participants in the program area apply for the PRP than can be accommodated, applications will be considered in the order they are received. In the case where employees in a program area apply to participate in the PRP at the same time, and not all employees can be accommodated, then the Federal SCD seniority shall determine the order of consideration.

5. Employees in PRP may be eligible for flexitour or maxiflex work schedules as per Article 20. Employees in PRP are eligible to work compressed work schedules and may earn credit hours, subject to the statutory limit of $\frac{1}{4}$ of the work schedule (10 hours per pay period).
6. It is the responsibility of the supervisor to confer with the employee and establish the official work schedule, which may include telework as per Article 7.
7. Mentoring activities must be clearly defined in the employee's performance standards.
8. Performance requirements must be measurable and results-oriented based on a PRP work schedule. Employees' EPPES must be adjusted to reflect their half-time tour of duty.
9. Union dues will be withheld in accordance with Article 5 of the LMA.

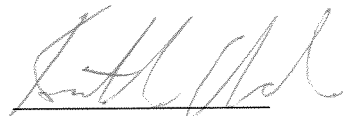
10. The PRP policies and procedures handbook shall be the information and procedures guide for the PRP where not inconsistent with this article.

FOR MANAGEMENT:

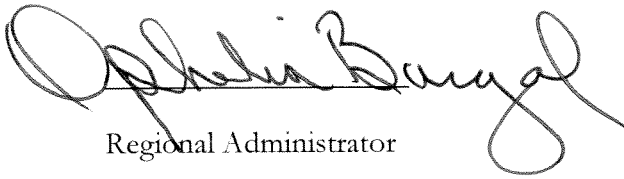


Ginger Richardson 8/12/15
Date
Chief Negotiator

FOR THE UNION:



Kenneth Einbinder 8/18/2015
Date
Chief Negotiator



Regional Administrator
Ophelia Basgal

NFFE 1450 President
Liz McDargh