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EMCC Active Retirement Role Reference Guide

Employee	Supervisor/ Division Chair	Vice President	President	Human Resources
Notify supervisor/division chair by 1 st Friday in October	Review survey and forward to Vice President during October	Include requests in division budget proposal	Approve or deny assignments by 1 st Friday in December	Poll employees annually on 2 nd Friday in September
Complete Interest Survey and forward to HR by 1 st Friday in October	Forward copy of official notification to retire in writing	Forward recommendations to President by 1 st Friday in November		Acknowledge employee’s receipt of survey & provide timelines by 2 nd Friday in October
Submit official notification in writing by 1 st Friday in February	Forward a copy of submitted evaluation to HR	VP Administrative Services reports on Active Retirement Program at February Leadership Council Meeting		Forward surveys to supervisor/ division chair for review in October
Approved assignments submit evaluation to supervisor/ division chair by April 15 th of following fiscal year				Complete MCCCCD “Notification of Retirement Form” or “Notification of Active Retirement Form” and forward to College President for approval

*This tool is to be used in conjunction with the Active Retirement Process & Timelines

EMCC Active Retirement Program

EMCC Active Retirement Consideration Process

Rationale: This process provides structure and transparency to the Estrella Mountain Community College active retirement process; with established guidelines and timeframes for consideration to participate and notifications of processes.

Process:

1. College employees will be polled annually and asked to notify their supervisor if they intend to retire and whether they are interested in participating in active retirement within an established timeframe.
2. Potential active retirement participants will complete and submit the *EMCC Active Retirement Interest Survey* to Human Resources Department declaring their interest to participate in the active retirement program within the established timeframe.
3. Human Resources will notify employee and supervisor/division chair via email acknowledging receipt of the employee's interest survey. The email will include process timelines and key contacts.
4. Human Resources will forward the requests (interest surveys) via intercampus mail to the reporting supervisor/division chair for consideration.
5. Supervisors/Division Chairs will review and forward requests to their appropriate Vice President for further consideration.
6. Active retirement assignment requests will be included in the division budget proposal and submitted through BDST. Funding will be provided in the following fiscal year.
7. Discussion of all potential active retirement assignments will be held among all the Vice Presidents with consideration of:
 - a. Resources
 - b. College needs
 - c. Assignments identified
8. Vice Presidents recommendations and support of assignments will be forwarded for approval to the College President.
9. All active retirement assignments must have the College President's approval.
10. All potential active retirement participants will receive notification to the status of their request.
11. Employees electing to participate in the active retirement program will submit official notification to retire (in writing) to their supervisor/division chair.
12. Supervisor/division chair will forward copy of official notification to retire to Human Resources.
13. Human Resources will complete MCCCCD "Notification of Retirement Form" and/or "Notification of Active Retirement Form" and forward to District Benefits Retirement Coordinator along with official retirement letter.

EMCC Active Retirement Program

14. Vice President of Administrative Services will generate a report capturing data such as:
 - a. Number of applicants
 - b. Number of accepted proposals
 - c. % requested by applicants
 - d. Source of funds (divisional or district/college)
15. All *approved* active retirement assignments will submit an evaluation to their supervisor/division chair at the end of each active retirement assignment year within the established timeframe.
16. Renewals only: The evaluation will be considered part of the request to continue an active retirement assignment the following year.

EMCC Active Retirement Program

EMCC Active Retirement Process Timeline

2nd Friday in September: Human Resources will send invitation to all regular employees:

- a. To submit their interest to retire within the next 5 years
- b. To indicate their interest in participating in the active retirement program for the following fiscal year to their supervisor by the **1st Friday in October**

1st Friday in October: Deadline for potential active retirement participants to submit their interest survey to Human Resources

(Active Retirement Forms are located under the “Procedures” link at EMCC Human Resources Website www.estrellamountain.edu/hr/)

2nd Friday in October: Human Resources send employee correspondence confirming receipt of interest survey

October: Human Resources forwards interest survey to supervisor/division chair for their review/consideration

October: Supervisor/division chair shares participants’ interest survey with their appropriate Vice President

October: The Vice Presidents will collectively decide and provide recommendation of active retirement assignments for approval to the College President based on resources and college needs. The list of college needs identified in the BDST process may be considered to identify the needs for active retirement assignments.

1st Friday in November: Recommendations for active retirement assignments will move from the Vice Presidents to the College President for final consideration and approval.

1st Friday in December: Active retirement assignments will be determined. Human Resources will notify employees selected to participate in the active retirement program.

1st Friday in February: Employees electing to participate in the active retirement program will submit an official notification to retire (in writing) to their Supervisor/Division Chair. Supervisor/Division Chair will forward a copy to Human Resources.

Note: If the employee chooses not to submit an official notification to retire by the established due date, the college will cease further consideration of the employee's request to participate in the active retirement program.

February: Human Resources will complete MCCCCD “Notification of Retirement Form” and/or “Notification of Active Retirement Form” and forward to College President for approval. Human Resources will forward official retirement letter and required forms to District Benefits Retirement Coordinator.

February Leadership Council Meeting: Vice President of Administrative Services will report on the active retirement program

April 15th of the Following Fiscal Year: Active retirement participants submit the *EMCC Active Retirement Assignment Evaluation* to their supervisor/division chair. Supervisor/Division Chair will forward a copy to Human Resources.

* Exceptions to these requirements will only be accepted under special circumstances and will be evaluated based on funding availability and college needs.

EMCC Active Retirement Program

EMCC Active Retirement Interest Survey

Please note: Responding to this survey does not guarantee you an active retirement assignment or obligate you to retire on a specific date or within a specific year.

Name: _____

Department: _____

Date: _____

RFP Faculty MAT Crafts M&O PSA Active Retiree

1) I tentatively plan to retire in the next 5 years (FY 2010-11 to FY 2014-15)

FY 2010-11 FY 2011-12 FY 2012-13 FY 2013-14 FY 2014-15

2) I would like to Enter the Active Retirement Program for FY 2010 -11:

No 49% Less than 49%

3) I am an Active Retiree and I would like to Continue in the program for FY 2010 -11:

Yes No

4) In what area (dept. /division) do you prefer to work during your active retirement?

***Please provide the details of your requested active retirement assignment on the following page.**

EMCC Active Retirement Interest Survey (Continued)

- 5) Please provide a summary of your proposed job description during your requested active retirement assignment. For non-faculty positions, please attach the description to this form.

- 6) What is the primary benefit to the college of having you perform the duties described above?

- 7) To which of the college's strategic direction(s) does this assignment link?

- 8) What is the proposed length of this assignment? (For the upcoming fiscal year, please indicate the proposed start and end date of the assignment you are requesting).

***Please note that active retirement assignments must be approved and renewed on a yearly basis and that approval/continuation of your assignment will be evaluated on annual basis.**

Please return this confidential survey to EMCC Human Resources by the 1st Friday in October

EMCC Active Retirement Program

**EMCC Active Retirement Program
Participation Notification**

Name: _____

Department: _____

On behalf of the Active Retirement Committee, we would like to thank you for your interest to participate in the Active Retirement Program for FY _____.

- Yes, your request to participate in the Active Retirement Program has been approved.
- Yes, your request to participate in the Active Retirement Program has been approved with modification.
- No, your request to participate in the Active Retirement Program has NOT been approved.

Resources

College Needs

Assignments

Best Regards,

 X

President Dr. Ernest Lara or designee

EMCC Active Retirement Program

EMCC Active Retirement Assignment Evaluation

Name: _____

Department: _____

Date: _____

Questions 1 through 3 correspond to the original questions on the *EMCC Active Retirement Interest Survey*. This form will be reviewed for consideration of renewing a current active retirement assignment.

- 1) Please provide a summary of the performed duties during your last active retirement assignment which occurred in Fiscal Year _____.

- 2) What were the primary benefits to the college of having you perform the duties described above?

- 3) To which of the college's strategic direction(s) and institutional priorities did this assignment link?

Please return this confidential evaluation to your Supervisor by April 15th

Your Supervisor/Division Chair will forward a copy to Human Resources