



Vice Provost for Academic Personnel  
900 University Avenue  
Riverside CA 92521  
951-827-3541

November 12, 2025

To: Ken Barish, Chair of Riverside Division

From: Elizabeth Watkins  
Provost and Executive Vice Chancellor

Daniel Jeske  
Vice Provost of Academic Personnel

Via: Cherysa Cortez, Executive Director of Riverside Division

RE: Pathway to Retirement Program

Dear Ken,

Enclosed for Senate review and comment is a proposed Pathway to Retirement Program designed to support Senate faculty members as they plan and transition from active service to retirement. The motivation for developing this program, which follows a similar program at [UC Santa Cruz](#), stems from a recognition that retirement is both a personal decision and an institutional transition point. Many faculty wish to conclude their active service in a manner that allows them to complete scholarly projects, mentor students, and prepare their departments for leadership and curricular continuity. The proposed pathway provides a means to formalize such arrangements, allowing faculty and administrators to craft individualized, pre-approved agreements that clearly outline expectations and commitments during the final phase of service.

The program envisions two categories of provisions:

- **Pre-retirement provisions** that may include waivers of mandatory reviews, modified teaching or service assignments, or targeted research support to assist in the completion of ongoing work.
- **Post-retirement provisions** that may, where appropriate, include recall appointments for teaching or research, continued access to office or laboratory space, or limited research support to sustain scholarly activity and connection to the academic community.

As is described in the attached proposal, each Pathway to Retirement Agreement would be jointly approved by the faculty member, department chair, and dean, with all financial and programmatic commitments explicitly defined. Agreements would specify a separation date no more than two years from approval and would constitute a binding commitment by both parties. Faculty participants would remain responsible for completing the formal steps necessary to elect retirement and initiate benefits under the University of California Retirement Program.

We invite the Senate's review and feedback on this proposal to help refine and strengthen the proposed program.

Attachments:

Pathway to Retirement Program Guidelines and Template Agreement

## **Guidance for Establishing a Pathway to Retirement Agreement<sup>1</sup>**

### **Definition**

A formal agreement between a Senate faculty member and the University of California that includes pre- and post- retirement provisions.

### **Pre-retirement Provisions**

When a faculty member has made a commitment to retire, it can be appropriate for the University to make special provisions during the transition to retirement while they are still in active service. These could include, among other things:

- Waiver of mandatory academic reviews for up to one year preceding the separation date. For example, a mandatory quinquennial review that would ordinarily have to be processed in the final year of service that precedes the retirement date could be waived.
- Modified duties in the final year of service that precedes the retirement date. For example, a portion of teaching duties may be relieved in exchange for additional service. An agreement of this type should take care to emphasize that duties are being modified and not reduced.
- Research support may be offered to help complete research tasks. Illustrative examples are conference travel, field work, and graduate student support.

### **Post-retirement Provisions**

Post-retirement provisions may not be part of a pathway to retirement agreement if nothing in particular is desired after the retirement date. On the other hand, provisions of this type can help ensure that emeriti are connected to their academic community and might include the following:

- A faculty recall agreement (provided the faculty member is 65+ years of age) for teaching that is based on programmatic need, budgetary capacity, and continued successful duties. The provisions should specify which course(s) are to be taught (including quarters and years). Recall agreements can also be for research or administrative service, which should similarly be described in detail. APM-205 provides the guidelines for setting up recall appointments, including time restrictions and salary rate.
- Review for Professor of Graduate Division (PGD) title. The PGD title requires Department, Dean, CAP, VPAP, and Provost review, with the Provost being the final

---

<sup>1</sup> Drawn heavily from the policy at UC Santa Cruz.

decision-maker. A pathway to retirement agreement can only include support for initiating the review process, with no guarantee of the outcome.

- Office and/or lab space can be provided when and where it is available for faculty who need space to continue their scholarly or creative work.
- Research funds may be provided, subject to availability, for faculty to complete ongoing projects.

### **Key Concepts**

- The faculty member's department chair and dean must agree to any and all of the pre- and post-retirement provisions and are responsible for providing any funding that is included in the agreement.
- The agreed upon separation date must be no more than two years after the date of the pathway to retirement agreement.
- Once approved, the pathway to retirement agreement cannot be modified or withdrawn, as it is a binding contract. The faculty will have tendered their future resignation, and the University will have accepted an obligation to adhere to the terms listed in the agreement.
- The pathway to retirement agreement is about transitioning out of a full-time active faculty position. There are additional steps needed to elect retirement and to receive retiree health benefits and pension benefits, which need to be pursued independently of the agreement.

## **Template for a Pathway to Retirement Agreement**

### **Acknowledgement**

Prior to the final approval of the Agreement below, the faculty member must read and initial the following four statements:

\_\_\_\_ I understand that when this Agreement has been finalized, I am irrevocably bound to separate no later than the date indicated in the agreement.

\_\_\_\_ I understand that when this Agreement has been finalized, the University is obliged to fulfill the provisions set forth below.

\_\_\_\_ I understand that while my separation on the named date is self-executing when this Agreement has been finalized, I must take further steps in order to retire and receive retiree health care benefits and benefits under the University of California Retirement Program.

\_\_\_\_ I understand that, in the event of a future finding of substantiated misconduct, the University is not precluded from imposing disciplinary sanctions pursuant to APM 015 and 016, even if by doing so the terms of this Agreement are altered. In such a case, the unaltered terms of the Agreement remain in effect.

## **Agreement**

On or about \_\_\_\_\_, at their/her/his own initiation, \_\_\_\_\_ expressed an interest in developing a Pathway to Retirement, including negotiation of a specific date for separation from University employment. In response, the parties negotiated this Agreement.

As of the date of the Dean's approval of this Agreement, \_\_\_\_\_ irrevocably resigns from University employment, with a separation date of \_\_\_\_\_. This resignation and separation are self-executing and require no further act of either party for full force or effect. The University hereby accepts the resignation as of the date of the Dean's approval. The retiring faculty member understands the need to complete additional paperwork to retire and to receive benefits under the University of California Retirement Program.

In reliance of this irrevocable resignation, the University agrees that \_\_\_\_\_ shall be provided with the following:

[Insert list of terms here]

This Agreement is contingent upon the written approval of the Dean and will have no force and effect without that approval. Once approved, this Agreement cannot be modified / withdrawn as it is a binding contract.

## **Signatures**

Requesting Faculty

Department Chair

Dean

Signature:

Date:

Name:

Title: