

## City of Shakopee Human Resources Department

### Phased Retirement Request Form

This form must be completed by the manager of an employee requesting the PERA Phased Retirement option, and the employee requesting a Pera PRO. The manager should work with management, including the HR Manager, to determine whether the city will grant the employee's request. The City of Shakopee has the sole authority to determine whether a Phased Retirement request will be approved.

|                                                                                                                     |                                     |                                                                                                                                        |
|---------------------------------------------------------------------------------------------------------------------|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Employee ID Number<br><i>102013</i>                                                                                 | Employee Name<br><i>Bruce Loney</i> |                                                                                                                                        |
| Date of Birth<br><i>6/29/54</i>                                                                                     | Date of Hire<br><i>2/6/1995</i>     | Supervisor's Name<br><i>Bill Reynolds</i>                                                                                              |
| Funding String (Current position)<br><i>0411</i>                                                                    |                                     | Funding String (New position)<br><i>0411</i>                                                                                           |
| Job Code and Job Title (Position Number – if they keep the same position but change it from full time to part time) |                                     |                                                                                                                                        |
| Initial Phased Retirement Date<br><i>6/1/2017</i>                                                                   |                                     | End of Initial Period (up to 1 year following Phased Retirement Date)<br><i>5/31/2018</i>                                              |
| Phased Retirement Renewal Date<br><i>6/1/2018</i>                                                                   |                                     | End of Renewal Period (up to 1 year following renewal date)<br><i>5/31/2019</i>                                                        |
| Hours Currently Working Per Week<br><i>40</i>                                                                       |                                     | Hours Per Week During Phased Retirement (Hours must be reduced by at least 25% and no more than 1044 hrs/yr or 20 hrs/wk)<br><i>20</i> |

Department must determine if the employee's request for Phased Retirement meets a business need, such as:

- ☐ Due to department reorganization, the employee's job will be reduced to part time and the job will be eliminated at the end of the phased retirement period
- ☒ The retiring employee will be replaced and in order to train a replacement a job overlap is required for a limited period of time
- ☐ Other, please explain

Note: If request is approved, a PERA Phased Retirement Agreement and an Application for PERA Retirement Benefits must also be completed and returned to PERA.

☐ Deny

|                                                         |                      |
|---------------------------------------------------------|----------------------|
| Employee Signature: <i>Bruce Loney</i>                  | Date: <i>4/11/17</i> |
| Approved By: _____<br>(Signature of Supervisor/Manager) | Date: _____          |
| Approved By: _____<br>(Signature of HR Manager)         | Date: _____          |
| Notes:                                                  |                      |

Distribution: Original: Personnel File  
Copies: Employee, Human Resources  
Last Updated: 2/2017

## PERA PHASED RETIREMENT PROCEDURES

- 1) PERA's **Phased Retirement Option** allows eligible Coordinated Plan members to receive a pension while working on a reduced hour schedule. An employee interested in, and eligible for, the PERA Phased Retirement option should meet with his/her supervisor and the HR Manager. The supervisor and HR Manager will work with management to determine if the Phased Retirement option will be offered.
- 2) The City of Shakopee has the sole authority to determine whether an employee's request for Phased Retirement will be approved. Examples of situations where a department could approve such a request are as follows:
  - Due to department reorganization, an employee's job will be reduced to part time and the job will be eliminated at the end of the phased retirement period.
  - The retiring employee will be replaced and in order to train a replacement, a job overlap is required for a limited period of time
- 3) The HR Manager must verify that an employee requesting Phased Retirement meets the following criteria:
  - a. Is a participant in PERA's Coordinated Plan,
  - b. Has been employed for at least 1,250 hours per year for the five years immediately preceding participation in the phased retirement program, and
  - c. Is age 62 or older
- 4) The HRM and/or supervisor should meet with the employee to review:
  - a. Requirements relating to Phased Retirement, and
  - b. The effect that a transfer from full time to part time status has on the city's group insurance, paid time off and optional benefit plans.
- 5) If the employee's request is approved and the Phased Retirement date and part time schedule are determined, the city's Personal Action Form must be completed with copies distributed as appropriate. **Note: HR must receive copies of the Request form as soon as the request is approved. Send signed scanned copies to [igabbard@shakopeemn.gov](mailto:igabbard@shakopeemn.gov) and [pkent@shakopeemn.gov](mailto:pkent@shakopeemn.gov).**

**Important:** The employee must be advised to contact PERA to request a PERA Phased Retirement Agreement and an Application for PERA Retirement Benefits. These forms are also available at [www.mnpera.org](http://www.mnpera.org) (click on Members, then Phased Retirement Option). Part A of PERA's Phased Retirement Agreement form is to be completed by the employee's supervisor or Human Resource Manager.

**PERA must receive their agreement and application forms before the employee begins their Phased Retirement assignment.**

- 6) The *initial* Phased Retirement period cannot exceed one year. The city may extend the individual's employment for additional periods of up to one year each. The total period of Phased Retirement may not exceed five years.

A new City Phased Retirement Request and Personal Action Form and a new PERA Phased Retirement Agreement must be completed to extend the employees Phased Retirement status beyond the initial term.