



TOWN OF CHAPEL HILL
Human Resource Development

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MEMORANDUM

To: Senior Leadership Team

From: Cliff Turner, HRD Director and Ken Pennoyer, Director of BMD

Date: January 13, 2017

Subject Retiree Return to Work Procedures

The Human Resource Development (HRD) and Business Management Department (BMD) in conjunction with the Manager's Office are reviewing our processes and practices to ensure they reflect our values and Council goals. We are discovering inconsistencies in how we administer some processes that make it difficult to monitor budgetary and equity impacts.

One such situation is the Retiree return to work process. There is a lack of consistency across the organization in how these situations are administered. Many times retirees are being brought back because there is no one on staff who has the skills and/or knowledge to handle the job responsibilities of the retiree. This raises concerns about the effectiveness of our succession planning and how we share institutional and professional knowledge among employees.

How we, as an organization, pass on institutional knowledge and plan for continuity of services as personnel retire, is an important factor for achieving our long-term goals. The values of professionalism, communications and teamwork are also involved in how we handle these important transitions.

Our interests are to:

- * To facilitate the timely and orderly exchange of job duties and responsibilities as employees prepare to retire from Town service
- * To safeguard institution knowledge and history during these transitions
- * To take the opportunity to evaluate and update positions before they are filled
- * To create a consistent set of practices and guidelines for retiree's that return to work

In order to ensure that we apply our practices consistently, monitor budgetary impacts and address how we develop staff, we are implementing the following process effective February 1, 2017:

Any Department that needs to bring a retiree back to work, after their retirement system mandatory 30 day break in service, will submit a vacancy pool form through the normal process. The form should indicate:

- a. The source of funds used to pay the retiree
- b. The business need (including specific projects, tasks, etc.) for bringing the retiree back
- c. Special skills the retiree brings that are needed to accomplish the project, etc.
- d. The length of time the retiree is expected to work up to a maximum of 6 months.
- e. A plan for how the Department will transition the retirees job responsibilities to either a new employee or current staff.

HRD and BMD will review the requests and make a recommendation to the Town Manager. Approval of the request is at the Manager's discretion.

If the Department needs an extension of time, beyond 6 months, they will need to submit a request for extension through the Vacancy Pool process at least 30 days in advance.

If you have any further questions do not hesitate to contact your HRD Partner or BMD.