Retired Annuitant Expectations

This document serves as an understanding between **(Retired Annuitant’s name and classification)** and **(supervisor’s name and classification)** that s/he is expected to provide knowledge transfer, mentoring, and/or training to the (insert unit)’s staff. **(Insert Retired Annuitant’s name)** agrees to fulfill the following role(s) and adhere to the following standards in accordance with these expectations.

 Purpose of the Assignment

As outlined through this document, **(insert Retired Annuitant’s name)** agrees to provide the following specific services to assist with workforce and succession planning:

* (Include specific tasks and goals of the assignment and how staff members can benefit. Consider what the Retired Annuitant can offer in terms of experience, knowledge, advice, and what would be of most value for the unit to gain as a result).

While it is understood that **(insert Retired Annuitant’s name)’s** services will be required to assist with other situations outside of providing knowledge transfer from time to time, it is expected that the majority of **(insert Retired Annuitant’s name)** be used for this function.

 Schedule

Based on **(insert Retired Annuitant’s name)’s** preferences, s/he agrees to work **(insert number of hours)** per week over the next **(insert number of months)** unless s/he wishes to conclude the assignment.

 Status Reports

In order to keep **(insert supervisor’s name)** informed of **(insert Retired Annuitant’s name)’s** progress in providing knowledge transfer to the unit, s/he agrees to meet **(weekly? bi-weekly?)** with **(insert** **supervisor’s name)** to provide status updates and to alert **(insert supervisor’s name)** of any difficulties or challenges s/he is experiencing.

 Conclusion of Assignment

If **(insert supervisor’s name**) determines that the **(insert Retired Annuitant’s name)** is not functioning in the capacity outlined above, his/her assignment will be concluded within the unit.

**The parties below agree to the terms of this agreement:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor’s Name Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Retired Annuitant’s Name Date