

	Employee Retirement Program	
	Document Reference: EOMS-HRMO-LD-PLN-004	Revision Number: 000
	Confidentiality Level: Internal	Approval Date: July 25, 2025
	Review Cycle: Annual	Effectivity Date: August 1, 2025

Employee Retirement Program

I. Purpose

The Retirement Program is designed to provide a structured framework that prepares DLSU-D employees for a smooth transition from active service to retirement. It aims to ensure holistic support—covering financial literacy, health and wellness, emotional well-being, and continuous engagement—anchored on the Lasallian core values of faith, service, and communion.

II. Scope and Coverage

This program applies to all full-time DLSU-D employees (faculty and staff) who are within three years of their mandatory or optional retirement age, as defined by University policies and national labor regulations. It includes:

- Employees with confirmed tenure or permanent status.
- Employees on fixed-term status but nearing retirement age.
- Provision for spouses or dependents (limited to selected sessions).

III. Objectives

1. To prepare employees for retirement through structured programs that promote financial stability, emotional readiness, and healthy living.
2. To strengthen awareness of retirement rights, benefits, and University-related retirement policies.
3. To build capacity for post-retirement engagement, including entrepreneurship, consultancy, volunteerism, or leisure.
4. To ensure a culture of gratitude and recognition for retirees' years of service.

IV. Definitions of Terms

1. Retirement Program – A structured institutional plan to prepare employees for their retirement transition.
2. Pre-Retirement Phase – Period within three years before an employee's retirement.
3. Wellness – State of holistic health, covering physical, emotional, social, and spiritual aspects.

V. Policy Statements

- DLSU-D commits to implementing a sustainable retirement program consistent with its mission of holistic formation.
- The program shall be implemented collaboratively by the Human Resource Management Office (HRMO), Finance and Accounting Office, University Health Services, and other support units.

VI. Program Framework and Phased Implementation

The Retirement Program is organized into four (4) phases, implemented within one year. Each phase addresses a core dimension of retirement preparation, culminating in the Retirees' Send-Off Ceremony.

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Phase 1: Orientation and Launch

Activities:

- Kick-off seminar: *“Navigating the Retirement Journey”*
 - Orientation on University retirement policies and government-mandated benefits (SSS, GSIS, Pag-IBIG, PhilHealth)
 - Distribution of the Retirement Transition Handbook
 - Introduction of program mentors (retired alumni, HR advisors)
 - Baseline assessment of health, lifestyle, and retirement readiness
- Output: Individual Pre-Retirement Plan (IPRP) established for each participant.

Phase 2: Financial Wellness

Activities:

- Pension and benefits briefing (SSS, Pag-IBIG, PhilHealth)
 - Financial literacy seminars (investment, pension planning, estate planning)
 - Budgeting for fixed income and healthcare costs
- Output: Strengthened financial planning and security roadmap for retirement.

Phase 3: Psychosocial and Health Preparedness

Activities:

- Group counseling sessions with licensed psychologists
 - Workshops on identity, purpose, and mental health in retirement
 - Peer-sharing circles with recent retirees
 - Medical check-up packages and personalized wellness planning
 - Fitness, nutrition, stress management, and mindfulness sessions
- Output: Enhanced psychosocial readiness and health portfolio for sustainable living.

Phase 4: Post-Retirement Engagement and Legacy

Activities:

- Exploring consultancy, teaching, or volunteer roles
 - Entrepreneurship and passion project incubation
 - Community service and alumni involvement pathways
 - Mentorship and knowledge-sharing with younger employees
 - Endorsement to the DLSU-D Retirees’ Association
 - “Celebrating the Journey” Send-Off Ceremony with awarding of retirement plaque, messages from administrators, retirees’ response, and fellowship
- Output: Completion of Retirement Transition Portfolio and formal recognition through the Retirees’ Send-Off Ceremony.

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VI Timeline of Implementation

Schedule	Activities	In-Charge/Partners
Phase 1- Orientation and Launch First Quarter January -March	Navigating the Retirement Journey: Understanding Policies, Benefits, and Building Your Personal Roadmap	HRMO
Phase 2: Financial Wellness Second Quarter April-June	Securing Your Financial Future: Practical Strategies on Pensions, Investments, and Managing Life on Fixed Income	HRMO CBAA
Phase 3: Psychosocial and Health Preparedness Third Quarter July-September	Sustaining Well-Being Beyond Work: Emotional Resilience, Healthy Living, and Finding Purpose in Retirement	HRMO DCAP SWC SHWO
Phase 4: Post-Retirement Engagement and Legacy Fourth Quarter October-December	Living with Purpose, leaving a Legacy: Opportunities for Engagement, Service, and Celebrating Milestones Celebrating the Journey-recognition ceremony (Send-Off)	HRMO HMD ABD BED-TESDA

VII. Retirement Send-Off Ceremony

The Retirees' Send-Off Ceremony is the culminating activity of the three-year Retirement Program of DLSU-D. It is a meaningful occasion that not only celebrates the transition of employees into retirement but also honors their loyalty, dedication, and contributions that have shaped the University's growth and success. Organized by the Human Resource Management Office in partnership with the Office of the Chancellor, the ceremony is designed to highlight traditions that make the send-off both memorable and dignified.

These include the formal recognition of service, the awarding of the retirement plaque, messages of gratitude from administrators, and the endorsement to the DLSU-D Retirees' Association. By bringing together the University community in a celebratory gathering, the ceremony ensures that retirees are honored with respect while remaining connected to DLSU-D as they embark on a new chapter of their lives.

VIII. Highlights and Features of the Ceremony

- **Recognition of Service** – Formal acknowledgment of retirees' loyalty, commitment, and years of service.
- **Awarding of Retirement Plaque** – Presentation of a plaque as a symbol of gratitude and appreciation.
- **Messages of Gratitude** – Heartfelt testimonials from selected administrators.
- **Retirees' Response** – Reflections and words of gratitude shared by the retirees.
- **Endorsement to Retirees' Association** – Official integration into the DLSU-D Retirees' Association for continued engagement.

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- **Celebratory Gathering** – Fellowship that provides space for the University community to celebrate this milestone together.

IX. Membership to the Retirees Association

Upon retirement, a staff member automatically becomes a member of the DLSU-D Retirees Association. This provision reflects the University's commitment to sustaining a meaningful connection with its retirees, recognizing their years of dedicated service, and ensuring that they continue to feel valued within the Lasallian community. Membership provides opportunities for continued engagement, access to selected University resources, and participation in activities that nurture a sense of belonging even beyond active employment.

As members of the Association, retirees shall enjoy the following privileges:

1. **Identification Card** – Issuance of a DLSU-D Retirees Association identification card, which serves as proof of membership and access to privileges.
2. **Access to University Facilities** – Continued use of the University Clinic, counseling services, library (on-site reading and research only), gymnasium, sports facilities, and function hall for retirees' association related activities)
3. **University Publications** – Access to University publications, provided upon request, to keep retirees informed and connected to institutional developments.
4. **Invitations to University Activities** – Inclusion in invitations to selected University events such as colloquia, concerts, programs, and sports fests, with applicable ticket discounts where available.

Through these privileges, the DLSU-D Retirees Association not only preserves the connection of retirees to the University but also affirms their continuing role as part of the broader Lasallian family. It ensures that retirement is not an end, but a transition into a new phase of engagement marked by fellowship, recognition, and sustained ties with the community they helped build.

X Individual Pre-Retirement Plan (IPRP) Form

The Individual Pre-Retirement Plan (IPRP) Form is a structured document designed to guide employees as they prepare for a smooth and meaningful transition from active service to retirement. It captures the participant's personal goals, action steps, and reflections across four major areas of retirement readiness: orientation and planning, financial wellness, psychosocial and health preparedness, and post-retirement engagement.

The IPRP serves a dual purpose:

1. For the retiree: It is a personal workbook that encourages reflection, planning, and proactive action for retirement readiness.
2. For the University and HRMO: It provides a documented reference to monitor the progress of employees in the Retirement Transition Program and ensure holistic support is provided.

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When to Fill Out the IPRP Form

1. **Initial Completion – Phase 1 (Orientation and Launch):**
 - Right after the orientation seminar and baseline assessment, retirees complete the first part of the IPRP.
 - This includes personal retirement goals, current financial/health status, and initial expectations.
2. **Progress Updates – End of Each Phase:**
 - After completing the activities in Phases 2, 3, and 4, participants update their IPRP to reflect new learnings, action steps, and adjustments.
 - For example, after the financial wellness sessions, they may update their budgeting plan or retirement savings strategies; after psychosocial workshops, they may record their wellness plan or coping mechanisms.
3. **Final Completion – Phase 4 (Post-Retirement Engagement and Legacy):**
 - Before the **Send-Off Ceremony**, participants finalize their IPRP.
 - At this stage, the document becomes part of their **Retirement Transition Portfolio**, summarizing their financial, health, and psychosocial readiness, as well as their engagement plans after retirement.

Purpose of Timely Filling Out

By completing the IPRP form progressively, retirees are able to:

- Track their development throughout the one-year program.
- Align personal goals with available resources and opportunities.
- Ensure that by the end of the program, they have a clear **roadmap for retirement living** that addresses financial stability, health, psychosocial well-being, and purposeful engagement.

XI. Roles and Responsibilities

- **HRMO:** Provides overall program oversight, manages orientation, and coordinates training activities.
- **Accounting and Treasury Office:** Handles retirement benefit computations and related financial matters.
- **CBAA (College of Business Administration and Accountancy):** Leads financial literacy programs to support sound financial planning and decision-making.
- **University Health Services:** Conducts health monitoring and implements wellness activities.
- **Safety, Health, and Wellness Office:** Ensures workplace safety standards and promotes holistic well-being initiatives.
- **DLSU-D Center for Applied Psychology (D-CAP):** Offers psychological assessments and counseling support.
- **Student Wellness Center (SWC):** Provides mental health and wellness programs to support life transitions.
- **Sports Development Office (SDO):** Promotes active lifestyles through sports, fitness programs, and physical well-being activities.
- **Hospitality Management Department:** Extends services for event support, wellness-related activities, and community engagement.

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- **Allied Business Department:** Shares expertise in entrepreneurial skills and applied business practices for livelihood opportunities.
- **BED–TESDA Center:** Facilitates skills-based livelihood training and alternative career pathways.
- **Colleges/Departments:** Encourage mentorship, foster professional growth, and support knowledge transfer opportunities.

XII. Monitoring and Evaluation

- Annual evaluation of program effectiveness through surveys, focus group discussions, and retirement readiness assessments.
- Submission of program progress reports to University administrators.
- Continuous improvement based on employee feedback.

XIII. Resources

- Budget allocation from HRMO and University central fund.
- Resource persons (internal and external).
- Facilities for training, workshops, and recognition events.

XIV. Documentation and Records

- Individual Pre-Retirement Plans (IPRPs).
- Attendance and completion certificates for trainings.
- Evaluation and feedback forms.
- Annual reports on program outcomes.

Prepared by:	Reviewed by:	Approved by:
DR. ROWELL R. PARAS Associate Director, L&D-HRMO	DR. EPITACIO B. MENDIOLA JR. Director, HRMO	DR. SONIA M. GEMENTIZA Chief Administrative Officer