

VOLUNTARY EARLY RETIREMENT AUTHORITY (VERA)

Agency:		
Date of Agency Request:		VERA Approval Authority Number:
Time Period for VERA	Open Date:	Expiration Date:

References: VERA: 5 U.S.C 8336(d)(2) and 8414(b)(1); 5 CFR 831.114 and 842.213

Instructions: Use this worksheet for voluntary early retirements.

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Y	N	Review Item	Comments
		Agency obtained approval from OPM to offer voluntary early retirements. (5 CFR 831.114 and 5 CFR 842.213)	
		<p>Agency offered voluntary retirement to employees who meet all eligibility requirements and consistent with the authority approved by OPM [5 CFR 831.114(k) and 5 CFR 842.213(k)]</p> <ul style="list-style-type: none"> • Serving in a position covered by the voluntary early retirement offer (i.e., in the specific geographic area, organization, series, and grade) • Employed continuously by the agency for at least the 31-day period ending on the date agency requested VERA • Has 25 years of service or at least age 50 with 20 years of service • Serving in appointment without time limit • Not received a decision notice of involuntary separation for misconduct or poor performance • Separated voluntarily during the open period of the authority • Employees on Active Duty in the Armed Forces 	
		Agency notified OPM of any changes in the conditions that served as the basis for the approval of the voluntary early retirement authority. (5 CFR 831.114 (g) and 5 CFR 842.213(g))	
		Agency ensured employees are not coerced into voluntary early retirement. Any instances of coercion was appropriately addressed with corrective action(s). (5 CFR 831.114 (l) and 5 CFR 842.213(l))	

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Effectiveness and Efficiency Items – Relates to Focus Area 1 – Workforce Planning: Agency leadership identifies the human capital required to meet organizational goals, conducts analyses to identify competency and skill gaps, develops strategies to address workforce needs and close competency and skill gaps, and ensures the organization is structured effectively.			
Y	N	Review Item	Comments
		The agency has a workforce plan that links directly to its VERA implementation plan. The workforce plan identifies current and future human capital needs, and delayering, reorganization, reduction in force, transfer of function, or other workforce restructuring or reshaping, consistent with agency human capital goals; (Sources: Agency’s Strategic Plan, HCOP, etc.)	
		Leadership strategies are in place to ensure a balance between VERA implementation and employee engagement. For instance, there should be evidence of communication and support from leadership to assist employees through the transition while maintaining their performance culture, productivity, and long-term goals.	
		The agency monitors the implementation of its VERA and communicates the status, which includes human capital data, measures, and milestones, with key stakeholders and business partners.	
		The Agency assessed its VERA usage to determine the impact of involuntary reductions, whether it has voided or lessened the impact on the Agency from budgetary shortfalls, and addressed positions no longer needed due to mission changes or different skill requirements.	
Case File Summary/Comments:			

Reviewer/Title: _____ **Date:** _____