

THE UNIVERSITY OF BRITISH COLUMBIA



Human Resources
Room 350 - 2075 Wesbrook Mall
Vancouver, BC
Canada V6T 1Z1
<http://www.hr.ubc.ca>

Date: February 17, 2009

To: Deans, Directors, Department Heads, Administrators

From: Michelle Berner, Director, HR – Total Compensation
Linda McKnight, Director, HR – Advisory Services

CC: HR Advisory Services

Re: President's Letter for Retiring Staff

[FOR INFORMATION –THOSE RESPONSIBLE FOR STAFF HUMAN RESOURCES MATTERS]

Please share this information with those in your department who are responsible for Staff Human Resources matters.

This provides an update on a current University practice of sending UBC Faculty and Staff a congratulatory letter signed by the University's President upon their retirement from UBC. We request your assistance in identifying sensitive cases to ensure the positive reception of the letters/program.

While this is a UBC practice for both Faculty and Staff who are retiring, this memo focuses on the process related to President's letters for Staff.

Background

The President's letter of congratulations for retiring Staff members is meant to recognize and thank Staff members for their service with UBC, and to wish them well in their retirement. The practice of the President sending these letters has been ongoing for a number of years.

The letters have been prepared based on a list generated by the Staff Pension Plan office. The list includes all Staff members who are leaving the employment of UBC and taking a pension (either by lump sum or as a monthly pension payment).

This practice was recently reviewed by the Focus on People Recognition Committee that has been formed to review and provide recommendations on UBC's Staff recognition practices. The committee's initial review of the President's letter for retiring Staff resulted in an acknowledgment that the letters continue to be valued by most retiring Staff members who receive them. However, in some cases these letters are not valued or welcomed, as in situations when a Staff member retired under less than optimal circumstances. Because there have been some negative reactions to the letters, a more rigorous process of identifying those who are eligible for a letter is being undertaken.

New Process

The new process for identifying Staff members who are eligible for the President's letter is outlined below.

1. HRMS-Generated List. The new process involves generating a list of eligible Staff members from HRMS, rather than relying solely on the Staff Pension Plan database. This is because not every Staff member that retires is part of the Staff Pension Plan (e.g., hourly CUPE 116 employees are not part of the UBC Staff Pension Plan).

The HRMS list includes all employees whose reason for leaving UBC is coded in HRMS as "retirement". "Retirement" is indicated in HRMS as the reason for leaving UBC when this was indicated on the *Transfer and Severance Notice* form completed by the faculty/department (see page 2 for additional information about this form).

Please advise your HR Advisor/Associate if you are aware of Staff members who are coded as leaving UBC due to "retirement", but for whom a President's letter *may not be appropriate or welcomed* (e.g., those who left under less than optimal circumstances).

Letters are generated monthly, so this is an ongoing requirement.

2. Staff Pension Plan Office Review. Next, the Staff Pension Plan office reviews the HRMS-generated list to identify any eligible Staff members who were missed, based on a cross-check with the Staff Pension Plan database.

3. List is Forwarded to the President's Office. The list that results from Steps 1 and 2, above, is forwarded to the President's office, where the letters are generated, signed, and distributed.

Thank you for your assistance in making this recognition initiative meaningful to those retiring.

Transfer and Severance Notice Form

The new process relies heavily on the "type of severance" being accurately recorded on the *Transfer and Severance Notice* form, which is completed when an employee leaves UBC – see the drop down box on the form below.

The screenshot shows the 'TRANSFER & SEVERANCE NOTICE' form. The 'SEVERANCE' section is titled 'Complete this section if the faculty/staff member is severing employment completely from UBC'. It contains several fields: 'TYPE OF SEVERANCE - Select one, plus reason', 'SEVERANCE DATES (YYYYMMDD)', 'DISPOSITION OF BALANCES', 'NOTICE', and 'SEVERANCE PAY'. The 'TYPE OF SEVERANCE' dropdown menu is open, showing options: 'Type: Resignation', 'Other: Retirement', 'Reason: Layoff With Recall Rights (CUPE)', 'Term Appt Ended', 'Termination w/o Pay', 'Termination With Pay', and 'Death'. The 'Retirement' option is circled in red. Below the dropdown, there are fields for 'Last day physically at work' and 'Last day paid'.

If an employee is retiring, the "Type" box should state "Retirement", as opposed to other types of severance, such as "resignation".

Next Steps

Over the next several months, the Staff Recognition committee will be reviewing UBC's Staff recognition practices and programs, and will make recommendations for changes. It's possible that the committee will recommend additional changes to the current President's letter of congratulations for retiring Staff. Until that time, however, the process detailed above will be in effect.

If you have any questions about the President's letter of congratulations for retiring Staff, please contact Shannon Charney at 604-822-8985 or shcharney@hr.ubc.ca. Thank you.