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# THE UNIVERSITY OF BRITISH COLUMBIA



**Human Resources**  
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**Date:** September 21, 2007

**To:** Deans, Directors, Department Heads and Administrators

**From:** Linda McKnight, Director – HR, Advisory Services

**CC:** HR Networks, HR Advisory Services

**Re:** Elimination of Mandatory Retirement for Management & Professional Staff

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We are pleased to announce that as of yesterday, the University and the Association of Administrative & Professional Staff (AAPS) finalized a *Letter of Agreement* that eliminates mandatory retirement for all M&P staff effectively immediately.

The full Letter of Agreement can be found on the HR home page at [www.hr.ubc.ca](http://www.hr.ubc.ca) in PDF format, along with an online copy of this memo. Please share this information with your M & P staff.

## HIGHLIGHTS OF THE AGREEMENT

### General Provisions:

- An employee may retire on or prior to their Normal Retirement Date (i.e., the end of the month in which the employee turns 65), or an employee can work beyond their Normal Retirement Date.
- Employees working beyond the Normal Retirement Date are required to perform the full scope of their duties and responsibilities.
- Employees must provide six months of written notice in advance of their planned retirement date.

### Benefits Coverage:

- The benefit plans that will continue beyond the age of 65 (until the employee receives pension benefits, which can be no later than the end of the year in which they turn 71) include: Extended Health Plan; Dental Plan; Optional Life Insurance for Members; Medical Services Plan; Employee and Family Assistance Plan.
- The tuition fee benefit will continue without any age restriction.
- The Staff Pension Plan will continue in accordance with the terms of the Plan and applicable legislation.
- The Basic Group Life Insurance coverage is reduced to 1x annual salary beyond the employee's Normal Retirement Date.
- Optional Life Insurance coverage for spouses and the Income Replacement Plan will not be available beyond the employee's Normal Retirement Date.
- Out-of-Country Emergency Travel coverage will be limited to 60 days.
- Short-term Sick Leave provisions will continue beyond the employee's Normal Retirement Date.

### Retirement Options:

Employees will continue to have access to UBC Policy #49, "Reduced Workload/Responsibility appointment – Non-Academic staff", and they will also have two other options available to them.

- Employees who have reached the age of 55 and who have 10 years of full-time continuous service may apply to their Head/Director to take one of two retirement options.

Serious consideration must be given to all such requests in an effort to assist employees wishing to phase-in their retirement. The University will balance flexible employment arrangements with the need to manage academic planning and operations. The grievance procedure is available to employees who believe that due consideration hasn't been given to their requests.

- The Retirement Options will be implemented as a pilot project.
- Employees must give advance notice of their intention to seek reduced workload retirement options. Twelve months' notice is preferred, and six months is required.
- Retirement Options are for a maximum of 4 years (including a 12 month notice period), and notice by an employee to enter into a Retirement Option constitutes irrevocable notice to retire.
- Salary during a Retirement Option is commensurate with the percentage of workload performed, and benefits are as outlined in Policy 49, and as per the terms in Section 2.0 of the Letter of Agreement that eliminates mandatory retirement for M&P staff.

#### **Option 1 – Phased-In Retirement**

An employee's workload will decrease over three years. During the first year they might drop to 75%, for example, and then in the second or third year they might drop to 50%. This can be modified by mutual agreement between the employee and the Head/Director, but the minimum level of workload is 50%.

#### **Option 2 – Part-time Retirement**

An employee's workload will decrease to 50% for three years. Employees may explore a range of possibilities, such as full-time/partial year to part-time/full-year options.

The University will supplement current retirement counseling options to provide a more holistic approach to retirement considerations.

#### **NEXT STEPS**

Human Resources will be reviewing our communications and implementation plans for this initiative over the next few weeks. In the meantime if you have any questions with regard to the above, please contact your Human Resources Advisor.

Our thanks to the AAPS committee members who collaborated with the University to achieve this positive agreement.