



Medicine Hat College Policy PHASED RETIREMENT

Policy #:	HR-07
Policy Authority:	Director, Human Resources
Executive Sponsor:	Vice-President, Administration and Finance
Approved by:	President
Effective Date:	March 29, 2018
Next Mandatory Review Date:	March 29, 2023
Frequency of Review:	every 5 years

1. POLICY OBJECTIVE

The purpose of this policy is to provide guidance for the administration of a voluntary phased retirement program aimed at providing eligible employees with an opportunity to participate in a managed transition to retirement.

The College believes that a phased retirement program would be of significant benefit in that it could provide a managed transition to retirement for eligible employees while facilitating the transfer of experience and expertise to new employees.

2. POLICY SCOPE

This policy applies to eligible faculty, excluded management and AUPE members employed by Medicine Hat College (MHC).

3. PRINCIPLES

- 3.1 This policy facilitates planning and accommodates requests for reduced workload leading to retirement and will be referred to as “phased retirement”.
- 3.2 This program does not apply to employees in full-time positions who may want to have their position reduced to continuing part-time for an indefinite period.
- 3.3 In order to have an application for phased retirement considered, a continuing full-time employee must
 - (a) be 55 years of age or older;
 - (b) have a minimum of 10 years continuous MHC service;
 - (c) work a reduced workload (as established in advance and agreed upon with Manager/Dean via the Reduced Work Agreement - Attachment B);
 - (d) mentor, share positional expertise and wisdom with any employee engaged as a replacement if required; and
 - (e) agree to the terms and conditions of the phased retirement policy.

- 3.4 The phased retirement period shall be a minimum of one and a maximum of three academic years. Normally, the period shall start at the beginning of the academic year on July 1 and end at the completion of the academic year on June 30.
- 3.5 Faculty and staff approved for phased retirement will continue as a full-time employee with a reduction in pay to reflect actual workload, or contact hours for faculty. Once the Phased Retirement Application (Attachment A) and Reduced Workload Agreement (Attachment B) has been agreed to and signed off, the phased retirement is irrevocable.
- 3.6 For the phased retirement period the reduced workload assignment shall be as follows
- workload between 50 and 75 percent of a full-time workload maximum; and
 - the employee will work for a full academic year, but less than normal hours (i.e. reduced workload). The workload is established based upon various factors including the operational requirements of the service area or program, or the personal circumstances of the employee.
- 3.7 During the phased retirement period, the employee will continue with their current benefits and cost sharing and the benefits will be based on 100 percent salary throughout the phased retirement period, subject to leave limits as per the Local Authorities Pension Plan (LAPP). For example, the employer will report salary, service and contributions at 100 percent even though the employee is paid on a partial salary. This does not apply where the employee has accessed five years of leave credit from the LAPP.
- 3.8 Employees approved for phased retirement will remain subject to the provisions of redundancy in their respective terms of employment and collective agreements.
- 3.9 Termination of employment at the end of the phased retirement period does not prevent the employee from entering into an employment relationship with the College in the future.
- 3.10 The College reserves the right to accept or deny an application based upon operational requirements and is conditional upon sourcing of a suitable replacement.

4. RESPONSIBILITIES

- 4.1 **Human Resources** is responsible for receiving and reviewing applications in consultation with applicable manager.
- 4.2 **Manager/Dean** is responsible for
- (a) approving or denying applications for phased retirement; and
 - (b) approving Reduced Workload Agreements.
- 4.3 **President or designate** is responsible for final approval of applications.

5. RELATED POLICIES

7.6: Local Authorities Pension Participation

6. RELATED PROCEDURES

PR-HR-07-01: Phased Retirement

7. RELATED INFORMATION

Faculty Contract

AUPE Agreement

Management and Excluded Employees Terms of Employment

Attachment A: Phased Retirement Application Form

Attachment B: Reduced Workload Agreement

ORIGINAL COPY SIGNED

Wayne Resch

Acting President and CEO

Vice-President, Administration and Finance

Date: March 29, 2018

DOCUMENT HISTORY

March 2018 Policy approved