

Lethbridge College Phased Retirement Program Instructions for Completing an Application

The phased retirement program uses a two part form – section 1 for faculty applying for consideration and Section 2 for College leadership approval process. To ensure accurate completion of the form, the following is offered for assistance.

- 1) Applicant Information
 - a) Name – include full name
 - b) Employee # - Lethbridge College employee number
 - c) School – include full name of school (example School of Media & Design)
 - d) Work Unit – include name of program area (example Fashion Design & Marketing)
 - e) Age/Service – criteria of the program require applicants to be at least 55 years of age and have completed at least 10 years of continuous service with the College
- 2) Duration – the duration of the phased retirement period shall be a minimum of one (1) and a maximum of three (3) years.
- 3) Dates
 - a) Last day of full-time employment – as faculty this will normally be the last day of the academic year which is June 30th, although participants age 60 or older, planning on taking early CPP benefits will need to consult CPP requirements to determine eligibility.
 - b) Commencement of LAPP benefits – normally the next calendar day following last day of full-time employment.
 - c) Commencement of phased retirement period – normally, the commencement date will coincide with the start of the fall semester of an academic year.
 - d) End of phased retirement period – normally the last pay period of the academic year which would be June 30th.
- 4) Requested percent (%) workload – the part-time percentage shall not be less than 50% nor greater than 75%. This supports the goal of the program of offering a managed transition to retirement.
- 5) Applicant's signature – must be signed and forwarded to Chair/Supervisor.
- 6) Dean recommendation – must indicate "Support" or "Do Not Support"
- 7) Rationale – rationale must be provided for not supporting the application (example: Two other faculty members from the program area are applying for the phased retirement program this year. I cannot afford to lose this much expertise at the same time.)

- 8) Recommended Priority – should there be several applications for participation in the program from the same program area, indicate the recommended priority, should only one be accepted (example – priority one of the two applications received).
- 9) Chair signature – must be signed prior to forwarding to the appropriate Dean.
- 10) Dean recommendation – must indicate “Support” or “Do Not Support”.
- 11) Dean signature – must be signed prior to forwarding to Director Human Resources.

Deadlines for applications and processing:

Deadline for applications to be submitted to Chair – November 15th

Recommendations completed by Chair – November 20th

Recommendations completed by Dean – December 7th

Recommendations received by Director Human Resources – December 9th

Applications to be approved finalized by the Dean and the VP Academic and Chief

Learning Officer appropriately informed – January 15th

Notification from Human Resources sent to applicants by January 31st

Phased Retirement Application for Faculty

Section 1

1. Applicant Information

a) Name: _____ Employee #: _____

b) School: _____

c) Program: _____

d) I meet Age/Service Requirements: Yes _____ No _____
(minimum age 55 with 10 years of LC service)

2. Duration of requested phased retirement period 1 year ____ 2 year ____ 3 year ____

3. Last day of full-time employment: _____
(normally last day of academic year – June 30th)

4. Commencement of LAPP benefits: _____
(normally day following last day of full-time employment)

5. Commencement of phased retirement: _____
(normally first day of academic year - July 1st)

6. End of phased retirement period: _____
(normally last day of academic year – June 30th)

7. Proposed workload percentage Year 1 ____ % Year 2 ____ % Year 3 ____ %

I hereby acknowledge that I have sought advice on and understand the financial and pension implications to me of retiring from Lethbridge College and undertaking the phased retirement program offered by the College. I am prepared to mentor, assist with orientation, and share instructional expertise and wisdom with any faculty engaged as my replacement. I also understand that once I have formally resigned and been re-hired by the College as a result of my participation in this program, this decision is irrevocable.

Signature: _____ Date: _____

NOTE: application must be submitted to your Chair by November 15th.

Phased Retirement Application for Faculty

Section 2

(To be completed by Program Chair and Dean for the applicable Centre)

Name: _____ Employee #: _____

8. Chair Recommendation: Support _____ Do Not Support _____

9. Rationale if not supported:

10. Recommended priority of this program application compared to other applications from within the area for the same period of time.

Number _____ of _____

11. Chair Signature: _____ Date: _____

12. Dean Approval: Support _____ Do Not Support _____

13. Dean Signature: _____ Date: _____

Completed forms are to be forwarded to Director, Human Resources by December 9th.