

**PHASED RETIREMENT PROGRAM
FOR FACULTY**

**LETHBRIDGE COLLEGE
Dated: February 1, 2013**

1. The College believes that a Phased Retirement Program would be of significant benefit to the college in that it could provide a managed transition to retirement for interested faculty while facilitating the transfer of experience and expertise to new faculty members.

Faculty has also expressed interest in a program through which their hours of work and/or the physical demands on them can be reduced as they approach a retirement date.

This program has been developed to facilitate planning and accommodate requests for reduced workload leading to retirement and will be referred to as the “phased retirement program”.

2. This program does not apply to faculty in continuing full time positions who may want to have their position reduced to continuing part time for an indefinite period of time.
3. In order to have an application for phased retirement considered, a continuing faculty member must:
 - 3.1. Be fifty-five (55) years of age, or older,
 - 3.2. Have a minimum of ten (10) years Lethbridge College service,
 - 3.3. Be prepared to work part-time in a term certain capacity,
 - 3.4. Be prepared to mentor, share instructional expertise and wisdom with any faculty engaged as replacements, and
 - 3.5. Be agreeable to the terms and conditions of the phased retirement program.
4. The phased retirement period shall be a minimum of one (1) and a maximum of three (3) academic years. The period of phased retirement shall be agreed between the college and the faculty member prior to approval of the application. Normally, the period shall start at the beginning of the academic year on July 1st and end at the completion of the academic year on June 30th.
5. The faculty member will be required to resign from the college once approval for phased retirement has been received. The faculty member will then be re-hired into a new position. It is this change of status which makes an approved faculty member eligible to apply for LAPP benefits. During the phased retirement period the faculty member changes status from continuing full-time to part-time term certain. Recognition of full College service and seniority will be maintained upon re-hire.
6. The faculty member approved for phased retirement will continue to receive salary as a part-time term certain (as per Article 12 of the collective agreement) but effectively has a predetermined, irrevocable end date to their continuing employment with the college.

7. Termination of employment at the end of the phased retirement period does not prevent the faculty member from entering into an employment relationship with the college as a casual employee for further academic years.
8. For the phased retirement period the reduced workload assignment shall be as follows:
 - 8.1. Part-time term certain working between fifty (50) and seventy five (75) percent of a full-time instructional load.
 - 8.2. Part-time faculty members are normally hired to work for a full academic year, but less than normal hours (i.e. part-time). The instructional load is established based upon various factors including the operational requirements of the program, and the courses assigned (the anticipated class and student contact periods), or the personal circumstances of the faculty member.
 - 8.3. A part-time workload request for only the fall or winter term will only be considered where it meets the operational requirements of the Academic Centre, however, the restriction of workload to either the fall or winter semesters cannot be guaranteed. In cases where this is approved, the faculty member will be required to take an unpaid leave of absence in the term that they are absent.
 - 8.4. If the part-time workload is restricted to either the fall or winter semester the other provisions of the collective agreement between the Board of Governors of Lethbridge College and the Faculty Association will be applied consistent with other part-time term certain faculty members for the non-teaching semester.
9. During the phased retirement period, the faculty member will have their normal benefit plans adjusted effective the commencement date of phased retirement. Benefits available will be as per Article 15 of the Collective Agreement available to part-time faculty and in effect during the phased retirement period. Where a workload request requires an unpaid leave of absence, benefit coverage will be subject to the provisions of Article 16.2.3 of the collective agreement in that the faculty member will be responsible for 100% of the premium costs.
10. Faculty approved for phased retirement are exempt from all provisions of Article 6 – Termination or Redundancy of Faculty Members except for disciplinary reasons.
11. The college reserves the right to accept or deny an application based upon operational requirements.
12. Other provisions of the collective agreement between the Board of Governors of Lethbridge College and the Faculty Association will be applied consistent with other part-time term certain faculty members and as outlined in Article 7 – Application of Agreement.
13. The application process will be as outlined in the attached “Appendix A” and may be modified from time to time by administration when operationally necessary.

Appendix "A" Phased Retirement Process

Application Process

1. The application deadline is November 15th for the following academic year.
2. An application form must be completed in full, indicating preferred end date and preferences for partial workload during the phased retirement period. The partial workload shall not be less than 50% or greater than 75% of a normal faculty workload for the program area.
3. The application shall be submitted to the faculty member's Chair (or applicable supervisor) by November 15th or the first business day thereafter, who shall add a recommendation to the application and forward to the Dean by November 20th. The Dean shall add any comments and forward to the Director of Human Resources on or about December 7th.

Evaluation Process

4. Applications received within each Academic Centre will be reviewed and approved by the Dean responsible for the Centre with input as needed from the respective Chair, Human Resource Consultant, and Business Analyst. The Vice-President Academic and Chief Learning Officer will be appropriately advised prior to January 15th.
5. Human Resources shall notify all applicants of the disposition of their application by January 31st. Such notice shall be copied to the respective Deans, Chairs, Human Resource Consultants and Specialists, and Payroll so that appropriate processing, budgeting and planning can be implemented.

Other

6. As the decision to participate in phased retirement is irrevocable once it has commenced, faculty are encouraged to fully consider the financial, pension and lifestyle implications of their decision. Should a major life event occur prior to commencement of phased retirement but after approval for participation, consideration may be given to cancelling a faculty member's application.
7. At the conclusion of the phased retirement period the faculty member ceases to be an employee on the date specified in the application form.
8. Termination of employment at this point does not prevent the faculty member from entering into an employment relationship with the College as a casual employee for future academic years.

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 – normally the first day of academic year July 1st.
 - 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 last day of 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 7th.