



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:	December 20, 2023
Next Mandatory Review Date:	December 20, 2028
Frequency of Review:	Every 5 years

1. POLICY OBJECTIVE

This policy provides guidance for the administration of a voluntary phased retirement program.

2. POLICY SCOPE

This policy applies to eligible full-time regular MHC faculty, AUPE and management/excluded employees.

3. PRINCIPLES

MHC values their employees and the knowledge, experience, and expertise they bring. A phased retirement program provides eligible employees the opportunity to voluntarily pass these resources on to new employees by participating in a managed transition to retirement.

4. DIRECTIVES

- 4.1 This program does not apply to employees in full-time positions who want to have their position reduced to part-time for an indefinite period.
- 4.2 In order to qualify, employees must be a minimum of 55 years of age and have a minimum of 10 continuous years of service with MHC at the commencement of their proposed phased retirement period.
- 4.3 Employees approved for phased retirement remain subject to the provisions of redundancy and termination as per their respective terms of employment, collective agreements, and legislation.
- 4.4 Unless 4.3 applies, an approved phased retirement application is irrevocable by all parties.
- 4.5 Termination of employment at the end of the phased retirement period does not prevent the employee from entering an employment relationship with the college in the future.

- 4.6 The college reserves the right to approve or decline an application based upon operational requirements and is conditional upon the successful hiring of a suitable replacement.
- 4.7 Applications must be submitted to Human Resources with Section 1 and Section 2 completed by November 1 of the year prior to commencement of phased retirement (i.e., apply by November 1, 2023 if phased retirement commencement is July 1, 2024).
- 4.8 The phased retirement period must be a minimum of one and a maximum of three years.
- 4.9 The phased retirement period normally commences July 1, to coincide with the start of the fiscal year.
- 4.10 The phased retirement period normally ends in the last pay period of the fiscal year, June 30.
- 4.11 During the phased retirement period, the employee maintains full-time status with existing benefits and cost-sharing arrangements. These benefits will be reported as if the employee were receiving 100 percent of their salary. This arrangement is subject to leave limits as per the Local Authorities Pension Plan (LAPP) regulations.
- 4.12 Workload
 - (a) 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.
 - (b) Employees approved for phased retirement work a reduced workload for the full year. The part-time workload percentage falls between 50 and 75 percent of an annual full-time workload maximum, and a reduced salary is calculated to reflect actual workload or contact hours for faculty.
 - (c) Once approved, annual changes to the agreed upon reduced workload must be submitted to Human Resources by May 1, prior to the next fiscal year.

5. RESPONSIBILITIES

- 5.1 **Supervisor** is responsible for
 - (a) reviewing and supporting/not supporting employee applications, and
 - (b) reviewing and approving annual changes to workload.
- 5.2 **Human Resources** is responsible for
 - (a) reviewing application in consultation with applicable supervisor.
- 5.3 **President and CEO** is responsible for
 - (a) approving or declining finalized applications.

6. RELATED POLICIES

7.6: Local Authorities Pension Participation

7. RELATED INFORMATION

MHC Faculty Association Collective Agreement
MHC AUPE Collective Agreement
Terms of Employment for Management and Excluded Employees
Phased Retirement Application Form

ORIGINAL COPY SIGNED

Kevin Shufflebotham
President and CEO

Date: December 20, 2023

ORIGINAL COPY SIGNED

Wayne Resch
Vice-President, Administration and Finance

Date: December 20, 2023

DOCUMENT HISTORY

March 2018	Policy approved
December 2023	Revised policy approved