

- 45.14 Salary for a NSERC UFA recipient shall be calculated in accordance with the provisions of Article 38.
- 45.15 Immediately upon conclusion of her appointment as a NSERC UFA recipient, a Member shall be subject to all of the provisions of the Collective Agreement for Full-time Faculty and none of the special conditions described above shall apply.

ARTICLE 46: RETIREMENT

- 46.1 Retirement shall normally commence 1 July; the President may accept an alternative date of retirement.
- 46.2 A member who wishes to retire shall provide at least twelve (12) months written notice of her intent to retire.
- 46.3 The notice specified in 46.2 shall be given to the President, with a copy to the Vice-President(Academic), her Dean/University Librarian, and the President of the Faculty Association. The President may accept a shorter notice of retirement. Such notice shall consist of a simple statement of the member's intention to retire and specify the effective date.
- 46.4 A decision to opt for retirement is final once notice is provided in accordance with this article.
- 46.5 A member who has given notice of her intention to retire may attend a group financial counselling session provided by the employer.
- 46.6 A member who is eligible for the voluntary early retirement or partial retirement incentives shall apply in accordance with Article 47.

ARTICLE 47: EARLY AND PARTIAL RETIREMENT INCENTIVES

- 47.1 Financial circumstances permitting, the Employer will undertake to direct savings generated by the retirement programs to the fulfilment of academic needs.
- 47.2 The provisions of the retirement programs set out in Articles 47.3 to 47.21 below shall come into effect on 1 July 2008.

Voluntary Early Retirement Incentive

- 47.3 A full-time member of the bargaining unit with tenure or permanence who has reached age 58 and who has twenty years of service at the University (including years of service at Dalhousie or Saint Mary's for Education transition faculty) but who is not beyond the age of 65 is eligible for voluntary early retirement. Once early retirement has been

granted under the terms of this Article, members are not eligible to return to employment with the University except as provided for in this article.

- 47.4 Members taking early retirement shall receive:
- 47.4.1 Annual payments to age 65 of 30% of pre-retirement salary to a maximum of 1.5 times pre-retirement salary; members retiring prior to age 60 shall receive a total of 1.5 times pre-retirement salary in equal annual instalments until age 65;
 - 47.4.2 An annual contribution to age 65 toward the cost of each member's benefits under the BeneFlex Plan of 30% of the amount described in Article 41.3;
 - 47.4.3 The following university privileges:
 - 47.4.3.1 Access to University facilities (library card, e-mail facilities, shared office space) to age 65;
 - 47.4.3.2 Eligibility for internal research funding to age 65 for members seeking or in receipt of external funding subject to review of existing policies by the Senate Research and Publications Committee. Laboratory facilities may be provided with the agreement of the Dean;
 - 47.4.3.3 Part-time teaching contracts - eligibility and issuance in accordance with CUPE 3912 Collective Agreement.
- 47.5 Members eligible for early retirement may attend an annual group financial counselling session sponsored by the Employer.
- 47.6 Early retirement shall normally commence 1 July; the President may accept an alternative date of early retirement.
- 47.7 In cases where the member's retirement would adversely affect her department's ability to offer its academic program, the Employer shall have the right to defer the effective date of retirement for up to one year. No deferral shall be for more than one year.
- 47.8 The member is expected to take any six-month or one-year sabbatical leave for which she is eligible before commencing early retirement. There shall be no compensation for unused years accumulated toward sabbatical leave.
- 47.9 By 1 January of the year preceding the date she wishes to retire, the member shall provide written notice of her intent to retire to her Dean, with a copy to her Chair/Director. In the case of librarian members, written notice of intent to retire shall be provided directly to the Vice-President (Academic), with a copy to the University Librarian.

- 47.10 The Dean shall consult with the Chair/Director regarding the Department's ability to meet its academic requirements in the event of the member's retirement. By 15 February, the Dean shall provide the Vice-President (Academic) with a recommendation regarding the member's early retirement, with copies to the Chair/Director and the member. In the case of librarian members, the Vice-President (Academic) shall consult with the University Librarian, and shall copy her recommendation to the President, the member, and the University Librarian by 1 April.
- 47.11 The Vice-President (Academic) shall provide the President with a recommendation regarding the member's early retirement by 1 April.
- 47.12 The President shall advise the member in writing of her decision by 1 May, with copies to the President of the Faculty Association and the Vice-President (Academic).
- 47.13 In cases where there is significant change in the member's personal or financial circumstances, a member who has elected to retire early may apply to the Joint Committee for the Administration of the Agreement for permission to reverse the decision. Such applications may be made no later than 12 months prior to the intended date of retirement.

Voluntary Partial Retirement Incentive

- 47.14 A full-time member of the bargaining unit with tenure or permanence who is between the ages 60 and 65 is eligible for a partial retirement incentive for a period of up to four years, or until age 65, whichever is the shorter.
- 47.14.1 If a member completes the partial retirement period before age 65, she will be eligible for the "Voluntary Early Retirement" program for one year only.
- 47.14.2 Once partial retirement has been granted, members are not eligible for post-retirement term appointments as outlined in Article 47A.
- 47.15 The workload of a member taking partial retirement shall be:
- 47.15.1 2/3 of the workload outlined in Articles 23 or 24; or
- 47.15.2 50% of the workload outlined in Articles 23 or 24; or
- 47.15.3 Full workload in accordance with Articles 23 or 24 for six months of the year commencing either 1 July or 1 January each year.
- 47.16 A member taking partial retirement shall receive:
- 47.16.1 75% of the reference salary for partial retirement under Article 47.15.1; or

55% of the reference salary for partial retirement under Articles 47.15.2 or 47.15.3.

- 47.16.2 Continued Employer contributions to the BeneFlex Plan, pro-rated to 67% for partial retirement under Article 47.15.1, and to 50% for partial retirement under Articles 47.15.2 or 47.15.3, except where precluded by an insurance contract;
- 47.16.3 Continued Employer contributions to pension based on 67% salary for partial retirement under Article 47.15.1, and on 50% salary for partial retirement under articles 47.15.2 or 47.15.3. The member shall have the option of making additional contributions in order to maintain pension contributions at reference salary level.
- 47.17 A member taking partial retirement may opt to change her workload from that outlined in Article 47.15.1 to that outlined in Articles 47.15.2 or 47.15.3. The member must notify her Chair/Director and Dean of her intention to make this change no later than the July 1 preceding the academic year in which the change is to occur. That change shall only occur once and shall be permanent.
- 47.18 The member is expected to take any six-month or one-year sabbatical leave for which she is eligible before commencing partial retirement. There shall be no compensation for unused years accumulated toward sabbatical leave. No further credit toward sabbatical leave is accumulated by members having commenced partial retirement.
- 47.19 The procedures governing a member's notification of intent to take partial retirement shall be in accordance with those laid down in Articles 47.9 to 47.13 above.
- 47.20 Partial retirement shall normally commence 1 July; the President may accept an alternative date of partial retirement.
- 47.21 A decision to opt for partial retirement is final, and the member may not return to full-time employment.

ARTICLE 47A**POST-RETIREMENT TERM APPOINTMENTS**

- 47A.1 A member who is already on a post-retirement contract and is applying for a subsequent post-retirement appointment shall apply to her Department/Faculty of Education no later than 1 November of the academic year preceding that in which the appointment is scheduled to begin.
- 47A.2 Upon recommendation of the Department/Faculty of Education and the Dean (or University Librarian), the Vice-President (Academic) may recommend to the President that the member be re-appointed to a post-retirement term appointment. Such applications shall not unreasonably be denied. The maximum number of post-retirement term appointments the President may approve for a member shall be three.
- 47A.3 47.3 The member shall retain her earned rank at her retirement date except that the pre-retirement salary shall be pro-rated for the nine-month term.
- 47A.4 Such members are not eligible for Employer contributions to the Pension Plan or to participate in the BeneFlex plan, nor are they eligible for sabbatical leaves.