

Bargaining Backgrounder Retiree Benefits

One of the highest priorities identified in the pre-bargaining survey of members was an improvement in retiree benefits. Such benefits can be categorized in two broad areas: support and encouragement for faculty and librarians who want to maintain active participation in scholarly/creative activities after leaving full-time employment; and payment of health and dental expenses. We believe the University benefits from the continuing scholarly/creative activity of emeriti, and we think maintaining the health of retired members is a fitting recognition of the contribution they made to the University when they were full-time employees.

Members have told us that the low level of retiree benefits coverage has caused them to consider delaying retirement. In the first area (continued support for scholarship), YUFA is seeking to ensure that the payment for post-retirement teaching, currently tied to the CUPE 3903 Unit 2 Course Director rate, rises with negotiated increases in that rate, regardless of when a member retired. We have also proposed that principal supervisors of Masters major research papers or MSc projects be compensated in the same way as principal supervisors of Masters theses. Principal supervisors of Masters theses (or PhD dissertations) are compensated 1/6 of a CD for each year of supervision, though such supervision is counted against the entitlement to post-retirement teaching (See Article 14.02.e) of the current [Collective Agreement](#)). Moreover, we propose that retirees who serve on thesis or dissertation supervisory committees also be eligible for compensation at a slightly lower rate (1/8 of a CD) than that of principal supervisors. We note that many retirees continue teaching and supervisory activity of value to the University for some time after leaving their full-time post, and we believe they should be fairly compensated for such contributions.

We know that many emeriti continue to be active researchers in retirement, and for that reason they elect designation as "Senior Scholars," a position that carries certain entitlements, including professional expense reimbursement (PER). We propose that such reimbursement be at the same rate as for full-time faculty, since most goods and services eligible for reimbursement are not provided to retirees at a discount. At present, PER is limited to a maximum of fifteen years ending no later than the tenth year after normal retirement date, and some retirees, depending on when they retired, have an even shorter period of entitlement. We believe it is in the interest of the University to allow an extension

of said entitlement for Senior Scholars who can demonstrate continued scholarly activity, and we propose that application for such an extension be permitted and extensions not be unreasonably denied.

Since retired scholars who continue to pursue research may not have the same access to external funding as active full-time faculty, we propose that the University increase its internal research funding with a \$75,000 fund for Senior Scholars, with grants awarded on a competitive basis.

In the area of health and dental benefits, we observe that at present the Employer covers the full costs of eligible health and dental benefits for full-time employees. However, when faculty and librarians retire, they receive limited coverage that includes a premium, a deductible of \$130 per person per year for most of the health coverage, and a co-payment 15% for many items. In addition, dental benefits are capped at \$1250 per annum, despite rising costs of dental treatment, well below the cap of \$7000 for current members. A number of other Ontario universities maintain the same health and dental coverage for employees after retirement. We believe York should do the same.

Finally, we propose that the funds made available for pre-retirement financial consulting through the Retirement Planning Centre be increased to reflect increased costs, and that unused financial advising funds be transferred to a surviving spouse or other beneficiary of a YUFA member who dies, up to a period of twelve months after the member's death.

Simple fairness, and the University's own interests, suggest these proposals should receive positive consideration.