EMPLOYEE RETIREMENT RECOGNITION
PROGRAM GUIDELINES

TOTAL REWARDS
HUMAN RESOURCES

June 2021
I. Introduction

This document and its appendices have been prepared to provide information to managers on the foundational policies, guiding principles, and procedures which support the Employee Retirement Recognition Program (the “Program”).

This Program is continuously monitored and periodically evaluated. Ongoing recommendations are made to ensure it continues to align with the university’s strategic direction and accordingly these Employee Retirement Recognition Program Guidelines will evolve as required.

The purpose of this Program is to support the recognition of retiring employees for their service to the University through a gift and event.

Please note these Guidelines apply to Support Staff (AUPE), Management and Professional Staff (MaPS), Faculty Members (TUCFA), and the Senior Leadership Team (SLT). While the University of Calgary fully intends to adhere to the policies and practices contained in this document, the statements and guidelines neither provide nor intend to establish strict procedures in all instances. Rather, they define intent and provide direction they are not and should not be considered a contract of any kind, express or implied. Although the guidelines reflect current policy, they may be changed or rescinded at any time, at the University’s sole discretion.

II. Definitions

Employee – refers to an individual who is engaged to work for the University of Calgary under a contract of service, that is, there is an employer-employee relationship between the individual and the university. For clarity, this term includes Support Staff (AUPE), Management and Professional Staff (MaPS), Faculty Members (TUCFA), and the Senior Leadership Team (SLT).

Gift – refers to a tangible item purchased for an employee in recognition of service. The item may be subsidized through University of Calgary funds.

Retiring Employee – defined as an employee who is 55 years of age or older and who has a minimum of two (2) years of service at the university.

Retirement Event – includes a reception, coffee party, buffet, luncheon or other similar social gathering to mark the retirement of an employee.

III. Retirement Gift

The University of Calgary will contribute up to a maximum of $450 (including GST) towards the cost of a gift to be given to an employee upon retirement from the university. The retiring employee’s department is responsible for the selection and purchase of the gift. The university’s contribution may be combined with voluntary donations from the retiring employee’s colleagues.

The gift should be presented to the retiring employee by the most senior leader in the faculty or department on behalf of the University of Calgary.

Expenses for the retirement gift will be submitted and/or recovered in accordance with the Gifts Expense Procedure.

Please note: University funds may not be used to provide a gift of cash to a retiring employee. Further, note that gift cards, gift certificates, and travel vouchers are considered ‘near cash’ or ‘equivalent to cash’ and are also prohibited.
IV. Retirement Event

Often a celebratory event will be held to mark the retirement of an employee(s). Although there is no restriction on the size or scale of the event, the department to which the employee(s) is affiliated is responsible for organizing the event.

The University of Calgary will provide a subsidy of up to $10 per attendee per retirement event. The department can choose to host a retirement event for more than one retiring employee; however, the contribution of $10 per attendee still applies. Expenses in excess of the available subsidy are the responsibility of the department affiliated with the employee(s). Although the format of the retirement event is discretionary, it should consider the preferences of the retiring employee(s) and include an invitation to family members or other guests as appropriate.

Expenses for the retirement event will be submitted and/or recovered in accordance with the Social Events Expense Procedure.

V. Submission of Expense Report

When submitting an Expense Report for reimbursement of a purchased gift (maximum $450) or event costs (maximum $10 per attendee per retirement event), please use the following accounting information:

<table>
<thead>
<tr>
<th>GL Unit</th>
<th>Fund</th>
<th>Dept. ID</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCALG</td>
<td>10</td>
<td>63045</td>
<td>60360</td>
</tr>
</tbody>
</table>

Receipts for event costs should include a list of the individuals in attendance. Please include the receipt as a file attachment when you submit the report online.

VI. Resources

For additional information related to Employee Retirement Recognition programs, please contact UService at 403.210.9300 or discuss with your Partner or Advisor, Human Resources.