

Article 43: Economic Benefits

General

43.1 Participation in all benefit plans (except Accidental Death and/or Dismemberment Insurance, Basic Life Insurance, Long Term Disability, Pension and Travel Accident Insurance) requires the employee to make application to Human Resources.

Definitions

43.2 “Dependent” means any unmarried child under 21 years of age who is living with and is financially dependent on the employee or spouse; any unmarried child under 25 years of age in full-time attendance at a recognized educational institution; any unmarried handicapped child of any age who is living with and is financially dependent on the employee and/or spouse and is incapable of self-sustaining employment. Child means a person born to the employee or spouse or a stepchild, legally adopted child, or legal ward, but not a foster child.

43.3 “Faculty” means full-time and part-time employees in the following categories, including professional practice appointments: Laboratory Instructors, Instructors, Assistant Professors, Associate Professors, Professors, Lecturers, Senior Lecturers, University Lecturers, Librarians and Archivists.

43.4 “Long Term” means full-time and part-time employees in the following categories, including professional practice appointments: Instructors, Assistant Professors, Associate Professors, Professors, Laboratory Instructors, Lecturers, Senior Lecturers, University Lecturers, Librarians and Archivists on continuing or probationary appointments; Limited Term Faculty, Librarians, Archivists and Laboratory Instructors who have an appointment of more than one year.

43.5 “Post Retirement Contract Employees” means Association Members on post retirement contracts.

43.6 “Recurring Limited Term” (RLT) means full-time and part-time employees who have held Association bargaining unit appointments totaling at least one year over a four-year period. RLT status will be maintained during any subsequent appointment, except if more than four years have elapsed since the end of the last appointment. For one year after the end of an appointment, RLT employees will be eligible to maintain their membership in medical, extended health and dental plans at their own expense. Appropriate prepayment arrangements will need to be made prior to the end of their employment.

43.7 “Retirees” means former Members of the Association who have retired.

43.8 Short-Term means full-time and part-time employees in the following categories: Limited Term Faculty, Librarians and Laboratory Instructors, any of whom are on appointment of one year or less. In the event that an employee originally appointed for a term of one year or less in any of the above categories is reappointed so that the total length of continuous appointment is more than one year, the employee will start receiving the benefits as though they were a long term employee when they have completed one year's service, but this will not be retroactive to the initial year of service.

43.9 “Spouse” means either an employee's legally married spouse or a person with whom the employee has co-habited for 12 months in a common-law relationship and who is known in the community as the employee's spouse or partner.

Medical

- 43.10 Employees who are not immediately eligible to participate in the Medical Services Plan (MSP) and require coverage may obtain private medical and hospital insurance and the costs of the premiums will be paid according to the arrangements detailed in Article 43.11 and 43.12.
- 43.11 Long term and Recurring Limited Term employees: Employer pays 40% of the current premium rate for employee and dependents (private equivalent to MSP).
- 43.12 Short-term employees: The University and employee share the premium for employee and dependents (private equivalent to MSP) 50:50.
- ~~43.13~~ Omit.

Extended Health Benefits

- 43.14 All employees are entitled to participate in the Extended Health Benefits plan after the required waiting period.
- 43.15 Long term and Recurring Limited Term employees: The University pays 100% of the premium for employee and dependents.
- 43.16 Short-term employees: The University and employee share the premium for employee and dependent 50:50.
- 43.17 Retirees with 10 years' service hired prior to September 1, 2001 pay 50% of the premium. All other retirees pay 100% of the premium.

Dental Plan

- 43.18 After the required three month waiting period, employees and dependents are entitled to participate in the dental plan which provides coverage for the following services:
Plan A: Basic diagnostic, preventative and restorative services
Plan B: Crown and bridge procedures and prosthetic appliances
Plan C: Orthodontia
- 43.19 Reimbursement for Plan A is 90% and for Plan B is 70% according to the BC College of Dental Surgeons Schedule of Fee Allowances. Reimbursement for Plan C is 85% with a life-time maximum of \$5,000 per Member or dependent.
- 43.20 Long term and Recurring Limited Term employees: The University pays 100% of the premium for employees and dependents.
- 43.21 Short-term employees are not eligible for dental benefits.
- 43.22 Retirees with 10 years' service hired prior to September 1, 2001 pay 50% of the premium. All other individuals pay 100% of the premium.
- 43.23 Reimbursement for eligible retirees is as follows: Plan A is 70%, Plan B is 50% and Plan C is 0%, according to the BC College of Dental Surgeons Schedule of Fee Allowances.
- 43.24 Spouses who are both employed by the University are entitled to independent coverage.

Basic Life Insurance and Optional Life Insurance

- 43.25 The University provides life insurance at two times the annual salary (rounded to the next highest thousand) for long term employees until their normal retirement date. Thereafter, the University provides life insurance at the annual salary rate (rounded to the next highest thousand).
- 43.26 Long term employees are eligible for additional optional life insurance in units of \$25,000 up to \$400,000 for themselves. Prior to their normal retirement date, they are also eligible for additional optional life insurance in units of \$25,000 up to \$240,000 for

their spouses. Proof of insurability is required for optional life insurance amounts between \$25,000 and \$400,000.

- 43.27 Long term and Recurring Limited Term employees: The University pays 100% of the premium for basic life insurance. The employee pays 100% of the premium for optional life insurance.
- 43.28 Short-term employees: This plan is not available to these employees.
- 43.29 The University will notify the designated beneficiaries/trustees of deceased Members that, on request, the University will arrange, as quickly as possible, for a partial prepayment of \$15,000 of the Group Life Insurance benefits due. The \$15,000 figure will be subject to biennial review.

Business Travel, Accidental Death and Dismemberment

- 43.30 All employees are covered by this insurance for the duration of their employment. The University pays 100% of the premium.
- 43.31 Business-related travel coverage during teaching and research semesters with a principal payment of \$150,000 in the event of death, and smaller sums in the event of dismemberment.

Employee and Family Assistance Plan

- 43.32 The Employee and Family Assistance Plan provides confidential, professional assistance to help faculty and staff, and their spouses and dependents, resolve problems that affect their personal lives or work performance. Participation in the program is voluntary, although it may be recommended when work performance problems exist.
- 43.33 The cost of the initial problem assessment, referral and follow-up treatment to a maximum of 12 visits annually per family is covered by the Employee and Family Assistance Plan. If further counseling is necessary, the client is responsible for the costs. Regular health insurance and/or other benefits may be applicable. If services that are not covered by insurance are necessary, the program counselor will endeavor to help minimize the costs by making referrals to the most appropriate agency. Normal procedures or leave policies apply to faculty or staff attending appointments. Sick leave may apply for residential treatment.

Vacation

- 43.34 Please refer to Article 45: Vacation.

Pension

- 43.x The parties have signed a letter of agreement regarding changes to the pension benefits available to Association Members, which is appended to this Agreement as Letter of Agreement X re: Pension.
- ~~43.35~~ Omit.
- ~~43.36~~ Omit.
- ~~43.37~~ Omit.
- ~~43.38~~ Omit.

Tuition Waiver

- 43.39 Full-time or part-time long term employees or recurring limited term employees, their

spouses, and children under 25 years of age will be exempt from the payment of tuition fees for any academic courses taken at Simon Fraser University.

- 43.40 Exemption from tuition fees does not imply exemption from any other fees which students may be required to pay, nor from any other requirements students are expected to fulfill.
- 43.41 The eligibility of a Member's spouse or child for admission to any academic course or program at Simon Fraser University is not affected in any way by the provisions of this exemption.
- 43.42 The tuition fee exemption will be prorated for the spouse and children of any employee whose appointment is less than full-time.
- 43.43 Subject to the limitations contained in this article, an employee's spouse and children will retain their eligibility for tuition fee exemption in the event of the employee's death.
- 43.44 Applications for tuition exemption pursuant to this Article will be made in accordance with procedures developed and amended from time to time by the University.
- 43.45 If the eligibility for this benefit is terminated during an academic semester in which a beneficiary is enrolled as a student at the University, the benefit will be deemed to expire at the end of that semester.

Tuition Reimbursement

- 43.46 Long term and recurring limited term employees are eligible during their appointment for 100% reimbursement of the tuition fees for completed job-related non-credit Simon Fraser University courses or job-related courses taken elsewhere. Prior approval of the Dean on advice of the Chair is required.
- 43.47 Short-term employees are not entitled to tuition reimbursement.

Professional Development Reimbursement

- 43.48 Faculty members are required to pursue professional development activities in order to remain at the forefront of their respective disciplines. These activities may vary by discipline but may include the purchase of books, periodicals and subscriptions; memberships in learned societies and professional organizations; the purchase of equipment and intangibles associated therewith; travel expenses for study leave, conferences or other related activities; and other expenses related to teaching, scholarship, and/or related academic activities.
- 43.49 Employees will be reimbursed for eligible professional development expenses which relate solely to those activities which enhance an individual's performance, ability or effectiveness in their employment at the University.

Eligibility

- 43.50 Long term full-time Members who are employed at the University during the 12 month period January 1st to the following December are eligible for reimbursement of accountable professional development expenses of \$1910 per year.
- 43.51 Recurring limited term Members and long term Members with part-time appointments who are employed at the University during the 12 month period January 1st to the following December are eligible for reimbursement of accountable professional development expenses on a prorated basis.
- 43.52 Members on leave of absence without pay or long term disability for an entire calendar

- year are not eligible for reimbursement of professional development expenses.
- 43.53 Members may submit a claim for reimbursement of professional development expenses once per year for expenses incurred in the current and immediately preceding calendar year. If a Member's expenses exceed the balance of their professional development account in any given calendar year, the excess portion of expenses may be resubmitted by the Member for reimbursement at the end of the subsequent calendar year. Members who retire, resign or are otherwise terminated, may submit a claim for reimbursement of professional development expenses in the last month of their appointment.
- 43.54 Any unused balance in a Member's professional development entitlement account at the end of each calendar year will be carried forward into a subsequent calendar year. A maximum of four years' entitlement may be accumulated in this manner.
- 43.55 Members may be reimbursed for their professional development expenses only. Expenses of other individuals are not eligible for reimbursement.
- 43.56 Any unused balance in a Member's professional development entitlement account at the end of a particular calendar year may not be paid to the Member as salary.
- 43.57 No claim may be submitted, regardless of the date at which the expense was incurred, after the Member has resigned, retired, or otherwise been terminated from the University.
- 43.58 Any unused balance in a Member's professional development entitlement account at the time of the Member's retirement, resignation or termination as an employee of the University will revert to the University's general operating budget.

Prorating Schedule

- 43.59 For part-time Members, the entitlement will be prorated according to the employment status.
- 43.60 For recurring limited term Members, the entitlement is prorated based on the proportion of the appointment during the calendar year

Eligible Expenses

- 43.61 Expenses incurred by the Member on their own behalf for professional development purposes are eligible to be reimbursed upon the presentation of receipts and the approval of the Director, Faculty Relations. Such expenses include but are not limited to the following:
- 43.61.1 Travel and associated expenses related to meetings, conferences, study leave or other similar professional activities
 - 43.61.2 Registration fees and other expenses for meetings of learned societies, other professional organizations, workshops, seminars and similar activities
 - 43.61.3 Membership fees in learned societies and professional organizations
 - 43.61.4 Fees and subscriptions for scholarly journals and books
 - 43.61.5 Expenses directly associated with teaching responsibilities or current active research or professional programs which includes equipment such as computer hardware and software
- 43.62 As non-taxable benefits, all goods purchased through the Professional Development Expense Account remain the property of the University. After three calendar years from the date of purchase, the Member has the option of purchasing these items from the University at fair market value. If the Member retires, resigns, or is terminated as an employee of the University prior to the expiration of this three-year period, the Member

will have the option of purchasing these items from the University at fair market value as at the date of such retirement or termination of employment.

43.63 The Professional Development Reimbursement is subject to Canada Revenue Agency approval.

Gym Membership

43.64 All Members and retired Members are entitled to a free gym membership allowing access to various Simon Fraser University facilities during recreational hours.

Relocation Expenses

43.65 At the time of appointment the University will assist new employees with the cost of relocation of domicile or travel to the Greater Vancouver Area (unless the faculty member's domicile is already within 50 kilometers of Simon Fraser University). The reimbursement schedule will be maintained by Faculty Relations and will be updated annually.

Benefits Past Normal Retirement Date

43.66 The following benefits will be altered or suspended for Members working beyond their normal retirement date:

43.66.1 Accidental Death and Dismemberment coverage is discontinued.

43.66.2 Basic Life Insurance is reduced to 1x normal annual salary.

43.66.3 Long Term Disability is discontinued. A Member who is unable to return to work following the exhaustion of his or her sick leave may elect to retire or may remain on unpaid leave of absence for a maximum of 24 months.

43.66.4 Optional Life Insurance may be continued until the age of 70.

43.66.5 Pension contributions will be discontinued when an employee retires or on November 30th of the year they turn age 71, whichever is earlier.

Benefits for Post Retirement Contracts

43.67 Employees on post retirement contracts must choose either the applicable retiree benefits package or to receive the following health benefits:

~~43.67.1 Omit.~~

43.67.2 Extended health: University pays 100%

43.67.3 Dental plan: University pays 100%

43.67.4 Optional life insurance: Employee pays 100%

43.67.5 Accidental death and dismemberment: The University pays 100%

43.67.6 Optional accidental death and dismemberment: Employee pays 100%

43.67.7 Sick leave of up to six months or the end of the contract, whichever is earlier

43.68 The following benefits are not available to employees on post retirement contracts:

43.68.1 Basic Life Insurance

43.68.2 Long term disability

43.68.3 Parental leave

43.68.4 Study leave

43.68.5 Relocation expenses

43.69 Members on post retirement contracts who are in receipt of pension benefits will not earn additional pension contributions. Employees who have not begun to receive pension benefits will continue to earn pension contributions.

43.70 All other benefits are unchanged for Members on post retirement contracts.

Post Retirement Benefits

43.71 Retirees hired prior to September 1, 2001, with more than 10 years of service are entitled to retiree benefits on the following basis:

43.71.1 Omit.

43.71.2 Extended health premiums paid 50% by the University and 50% by the employee

43.71.3 Dental plan premiums paid 50% by the University and 50% by the employee

43.72 Retirees hired after September 1, 2001 with more than 10 years of service are entitled to retiree benefits on the following basis:

43.72.1 Extended health premiums paid 100% by the employee

43.72.2 Dental plan premiums paid 100% by the employee

Benefits on Death

43.73 Upon the death of an employee, spouses and dependents will continue to receive applicable health, extended health and dental benefits for a period of 12 months.

Benefits for Part-Time Members

43.74 Part-time employees will be eligible to participate in all the benefit plans available to their full-time colleagues except that:

43.74.1 tuition-reimbursement/waiver, study leave and the professional development reimbursement are prorated in accordance with the percentage of the appointment;

43.74.2 those with an appointment of 25% or less are ineligible for Basic Life Insurance and Long Term Disability insurance.

This article is agreed to by the parties on this ____ day of _____, 2020.

Jennifer Perry, for SFU

David Broun, for SFUFA