

Retiree Microsoft Office LOU

PREAMBLE

WHEREAS the University Administration and the University of Toronto Faculty Association wish to recognize the contributions of retired faculty and librarians;

NOW THEREFORE the parties agree as follows:

If the parties reach agreement, they agree to jointly announce this Retiree Microsoft Office LOU

THE NOTICE OF INTENT TO RETIRE

Faculty members and librarians can indicate their level of involvement in university business after retirement, if known, at the time of submitting their Notice of Intent to Retire form normally submitted 12 months in advance of retirement. All retired faculty members & librarians, regardless of their engagement with the University, have access to the web version of email and calendaring in the normal course.

1. ALL RETIREES

For the six-year period from July 1, 2023 to June 30, 2029, faculty members and librarians will be offered upon their retirement, full reimbursement by the University for the one-time purchase of a personal Microsoft Office perpetual package for one computer (currently valued at approximately \$170.00), subject to submitting a receipt for this purchase to their departmental business officer and completing any reimbursement forms to be provided by the University within six months of the commencement of their retirement or six months after the date of the joint announcement of this Retiree Microsoft Office LoU, whichever comes later. For clarity, this entitlement will be offered to all faculty members and librarians upon their retirement from the University, regardless of whether they will continue to be actively engaged in activities at the University following their retirement. Access to the full suite of Microsoft Office will be continued for a six-month grace period past the retiring faculty member or librarian's effective date of retirement to assist in transitioning their files to a personal device. The University agrees to provide IT support for the transition from an existing University of Toronto Microsoft Office 365 license to a personal Microsoft Office license as part of faculty member and librarian offboarding and during this six-month grace period.

2. RETIREES ACTIVELY ENGAGED

In certain cases, retirees may continue to be engaged in University business into retirement, necessitating access to further University resources in support of this official engagement. To have access to the full suite of Microsoft Office, they must be "actively engaged" in one or more of the following activities associated with the University:

- (a) Teaching;
- (b) Supervision of graduate students;
- (c) Research (including creative professional activity)
- (d) Service
- (e) Some other special project requiring access to full MS Office license beyond email.

The respective academic units will designate retirees active for a defined period by confirming the retiree continues to be engaged per the criteria above. This active engagement will be audited every 3 years by confirming with each academic unit that the retiree continues to be actively engaged as per (a), (b), (c), (d), and (e) above. Should the University determine a retiree is no longer actively engaged, this will be communicated to the retiree and their active engagement designation will end January 1 or July 1

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depending on their retirement date. Access to the full suite of Microsoft Office will continue for a six-month grace period past this date to assist in transitioning their files to a personal device. During this six-month period, they will continue to have access to IT support.

These actively engaged individuals can choose at any time to purchase a personal license and access reimbursement for a personal license as per the provision in section 1 above. Access to the University Microsoft Office 365 license will continue until the end of the period of active engagement.

3. FACULTY MEMBERS AND LIBRARIANS WHO RETIRED PRIOR TO JULY 1, 2023 AND CONTINUE TO BE ACTIVELY ENGAGED

Faculty members and librarians who retired prior to July 1, 2023, who were designated as “actively engaged” and remain so at the time this agreement is signed, and who are notified at any time between the date this agreement is signed and June 30, 2029 that they are no longer designated to be “actively engaged” will be offered reimbursement by the University for the one-time purchase of a personal Microsoft Office perpetual package for one computer (currently valued at approximately \$170) as set out in Paragraph 1. Each individual will be provided with a six-month grace period following the end of their designation as “actively engaged” to seek this reimbursement. Access to the full suite of Microsoft Office will continue for this grace period to assist in transitioning their files to a personal device. During this grace period, they will continue to have access to IT support.

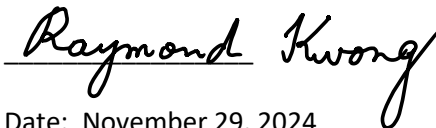
The arrangements set out above may be renewed or extended beyond June 30, 2029 by the mutual agreement of the parties.

Nothing in this letter of understanding will preclude the University from providing retirees actively engaged in University activities with additional software necessary for the performance of their duties and responsibilities.

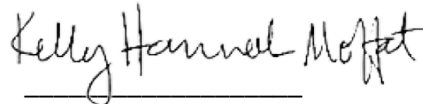


For the Association

Date: November 29, 2024



Date: November 29, 2024



For the Administration

Date: Dec 11, 2024



Date: Dec 11, 2024