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Message to Retirees, April 17, 2024

Dear colleagues,

I am writing to provide an update on the status of negotiations with respect to retiree access to Microsoft 365. You may recall that in the summer of 2022, the University Administration announced, without warning or consultation, that retirees would no longer have access to Microsoft 365, except for those who were actively engaged with the university. Active engagement was defined to be involvement in teaching or research or some special project consistent with the university's academic mission. What constitutes involvement was left to the retiree's local unit to determine. Definitions of “active engagement” varied considerably in practice and were sometimes applied without any direct input from the individual retirees about whom decisions were being made. This was hugely problematic for many retirees. UTFA raised the issue with the Administration and the Microsoft 365 access was extended until April 2023. Since then, only retirees with an active engagement with the university as determined by local units continue to have access to the full suite of Microsoft 365 licensed at the university. Retirees not deemed to be actively engaged only have access to Outlook and Calendar, allowing them to get email but little else.

When a new round of salaries, benefits, and workload bargaining started in September 2023, UTFA had identified retiree access to Microsoft 365 as one of the items it would pursue for improvement. The Administration admitted that it had not managed the process well but insisted that the software is a tool of work and not a benefit. Hence, if a retiree is not actively engaged with the university, they would not have access. During several exchanges across the table, the UTFA bargaining team closely examined the current contract with Microsoft, and in a letter to the Administration, pointed out the commitment that Governing Council made to retirees encouraging their continual involvement with the University. During the last bargaining session before a temporary pause, the Administration moved away somewhat from its present arrangement and tabled an offer to UTFA. In the following, I will summarize the salient features of the Administration's proposal (and you can read the proposal here).

1. For the five-year period from July 1, 2024 to June 30, 2029, all 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 package with a perpetual license for one computer. This will be offered regardless of whether the retiring faculty member or librarian will continue to be actively engaged in

activities at the University.

2. The University Administration agrees to provide support for the transition from an existing University of Toronto Microsoft 365 license to a personal Microsoft Office license when a faculty member or librarian retires.

3. The arrangements outlined in item 1 may be renewed or extended beyond June 30, 2029, by mutual agreement between the Administration and UTFA.

4. Retirees who continue to be actively engaged will continue to have access to Microsoft 365 until their active engagement ends. They can choose at any time prior to the end of their active engagement to purchase a personal license and receive full reimbursement in accordance with item 1.

For faculty members and librarians retiring during the next 5 years, this offer provides improved access to Microsoft Office software. One detail missing about which the Administration promised to get back to UTFA is a list of the software programs included in the proposed personal Microsoft Office package. It will include Word, Excel, PowerPoint, and Outlook, but the Administration was unable to provide a definitive statement about other potential inclusions before the pause in bargaining. Some programs such as OneNote and Teams can be downloaded from Microsoft and used for free.

The Administration's offer is on the table, but UTFA has not yet accepted it. On behalf of the team, I would like to ask for your feedback on the adequacy of the Administration's offer. Please send me your response by email to kwong@utfa.org or preferably by submitting this Google form whether the offer will meet your needs, or you see issues with respect to your retirement situation. ***Please be as broad or specific and detailed as you see fit.*** Your feedback will guide the bargaining team in terms of future negotiations related to this issue. Note that the Administration has not moved from its position that Microsoft 365 is a tool of work and not a benefit. UTFA does not agree that such access is a tool and not a benefit since retirees play an important and beneficial role in advancing the mission of the university. UTFA's arguments are also based on criticisms of the current practice and its implementation. Your feedback will help the bargaining team see whether we should press even stronger with the moral suasion arguments or whether there are unexplored viewpoints that can be fruitfully presented.

The bargaining team will be meeting with the Administration on April 30, 2024. To allow us time to go through your opinions and formulate our position for that meeting, I would ask you to **send your feedback to me no later than April 23, 2024.**

This is a long email. Thank you for reading it and thank you in advance for your feedback.

Raymond Kwong
Council Representative for Retired Members
Member of the UTFA Bargaining Team

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