

MEPP Grandfathering Guidelines

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Published by Alberta Public Service Commission

Date of publication: **December, 2020**

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Overview

- The Order in Council (O.C.) [#103/2020](#) and [#413/2020](#) approved amendments to the Management Employees Pension Plan (MEPP) Regulation that extend participation in MEPP for employees as follows:
 - grandfathering of employees when their classification has changed from management to non-management based on specific policy and conditions as outlined below, and
 - inclusion of professional or opted out and excluded (OOE) classes, subject to Public Service Commissioner authority.

Eligibility

- These Guidelines apply to Government of Alberta (GoA) employees who are employed, pursuant to the *Public Service Act* (permanent, temporary salaried, and contract as described in the [Pension Membership Policy - Part-time, Temporary and Fixed Term Contract Employees](#)), in a position meeting the following criteria:
 - classified or designated as a management position,
 - not included in a bargaining unit or any other unit for the purposes of collective bargaining, and
 - the classification or designation of the position entitles the incumbent to participate in MEPP, as established by the Public Service Commissioner.

Conditions for Grandfathering

- Grandfathering applies to management employees participating in MEPP that are involuntarily moved to non-management positions as follows:
 - they receive notice, or have received notice, that their position will be, or is, reclassified to a position to which PSPP applies, or
 - they are appointed to a position under the *Public Service Act* to which PSPP applies.

- The involuntary reclassification or appointment must occur, or must have occurred, as a result of Employer initiatives such as the joint employer-union exclusions review, a reorganization, a reassignment, or the addition of a new classification stream applicable to MEPP.
- Between September 1, 2019 and January 1, 2023 (both dates inclusive), the GoA must provide, or must have provided, written notice, including the effective date, of the involuntary reclassification or appointment to the employee.
- Grandfathering in MEPP does not apply to employees reclassified or appointed to a position eligible for PSPP, due to disciplinary actions or common law duty to accommodate.

Application of Grandfathering

- Grandfathering applies to the impacted employee only; once the position is vacated newly appointed individuals to that position will not be eligible for MEPP.
- Employees impacted must remain continuously employed in the position of their last reclassification or appointment to remain eligible for participation in MEPP.
- Except for pension, all other terms and conditions of employment will align subsequent to the application of the applicable transition directives, with the non-management classification.
- Employees must be continuously employed with the GoA during the period from the date notice is given until the effective date of the reclassification or appointment.

Scenarios illustrating Eligibility for Continued Participation in MEPP

Scenario	Details	Impact
Grandfathering of Employees Impacted by Employer Initiative (Exclusions Review, Reclassification, Reassignment or New Classification)		
Joint Employer-Union Exclusions Review	Management positions are provided one year's notice prior to moving into the Bargaining Unit (BU) and require reclassification	Individuals will be grandfathered in MEPP when they move into the BU (post notice period), and will remain in MEPP until they leave the position
Department Re-organization - Reclassification	Management positions are reclassified to non-management without substantial changes to the accountabilities and responsibilities of the position	Individuals will be grandfathered in MEPP when they move into the BU or Opted Out and Excluded (OOE) classification, and will remain in MEPP until they leave the position
Department Re-organization - Reassignment	Manager incumbents are reassigned and appointed from a manager position to a non-management position with substantial changes to accountabilities and responsibilities	Individuals will be grandfathered in MEPP when they move into positions that are part of the BU or are classified as OOE, and will remain in MEPP until they leave the position
New professional or OOE Classification created	Management incumbents transition to a newly created classification which includes MEPP as part of the classification's entitlements	Upon implementation, individuals will remain in MEPP, other terms and conditions of employment to align with the newly created classification entitlements.

Resources

- Management Employees Pension Plan Regulation
- Pension Membership Policy - Part-time, Temporary and Fixed Term Contract Employees

About this Guideline

Authority: [Public Sector Pension Plans Act](#)
[Public Service Act](#)

Application: [Management Employees Pension Plan Regulation](#)

Effective Date: January 1, 2021

Contact: Strategic Services and Public Agency Secretariat, Workforce Policy, Total Compensation and Job Evaluation Policy