



HUMAN RESOURCES PROPOSAL FOR A PRE-RETIREMENT CONTRACT

- This form must be completed by a business unit when a Pre-retirement Contract is to be created.
- Please become familiar with the University's policy on [Pre-retirement Contracts](#) (including the flow diagram *Process of creating and negotiating a pre-retirement contract*) before completing the form.
- It is important that the business unit seek advice and assistance from Human Resources in all aspects of negotiating and creating a pre-retirement contract.

School/Admin dept

Enquiries to Extension

SECTION 1 - EMPLOYEE DETAILS

Title Family name Given names

Employee No. DOB (dd/mm/yy) Age

SECTION 2 - POSITION DETAILS

Existing position Yes ☐ No ☐ Position No. Position Title

Level of Appointment TRIM Ref No.

Work Function (please tick the appropriate box) Academic: Teaching Only ☐ Research Only ☐ Teaching and Research ☐
Professional & General: Research Only ☐ Other ☐

Business Unit (C Level) MBDP Supervisor Name

Accounts to be charged

Business unit Project/grant Account %

SECTION 3 - PRE-RETIREMENT CONTRACT DETAILS

Contract commencement date (dd/mm/yy) Contract end date (dd/mm/yy)

Length of contract: years and months.

3.1 Salary Level Level Step

3.2 Is there an existing allowance? ☐ No ☐ Yes → If yes, is the allowance to continue? ☐ No ☐ Yes

3.3 Hours/Work Arrangements

Tick one	Arrangement	FTE
<input type="checkbox"/>	Work at current FTE (full-time or part-time) for the entire term of the contract	<input type="text"/>
<input type="checkbox"/>	Semester time only for all or part of the contract	
<input type="checkbox"/>	Part-time for all or part of the contract (please specify periods and FTE)	<input type="text"/>
<input type="checkbox"/>	Work reduced hours with no proportional reduction in salary	
<input type="checkbox"/>	Work reduced hours with Superannuation contributions maintained at the full-time level	
<input type="checkbox"/>	Other – e.g. phased reduction, job-share (please specify periods and FTE)	<input type="text"/>

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SECTION 3 - PRE-RETIREMENT CONTRACT DETAILS (continued)

3.4 Pre-Retirement Loading (Note: loadings do not apply to leave paid out on termination)

No ☐ Yes ☐ → Percentage of base salary %

Period loading will apply

- ☐ For the entire contract, or
- ☐ From to

Superannuation on loading

- ☐ Superannuation contributions will be paid at the SGC rate of 9.5%, or
- ☐ Exceptional circumstances exist and the loading is to attract the employee's normal superannuation contributions (Note: The employee is strongly encouraged to seek professional financial and taxation advice) — HR Superannuation are to be notified.

3.5 Ex-gratia payment (note that an ex-gratia payment will not normally be approved as well as a pre-retirement loading)

No ☐ Yes ☐ → Amount \$

Superannuation on ex-gratia payment

Where an ex-gratia payment is paid in relation to a pre-retirement contract in lieu of a loading, superannuation at the SGC rate of 9.5% will apply to the ex-gratia.

Taxation on ex-gratia payments

(Professional taxation advice must be sought)

The payment will be taxed, according to ATO guidelines on Eligible Termination Payments (ETP).

3.6 Duties

If duties to be carried out are to be stipulated in the contract, please provide details.
E.g. specific projects, mentoring, succession planning activities etc.

3.7 Sabbatical

Tick box if eligibility for sabbatical is to be retained ☐

Justification:

SECTION 4 - LEAVE CLEARANCE

Current leave liability: Recreation Leave Hours Long Service Leave Hours

Tick the box which applies in regard to recreation leave:

- ☐ Accrued recreation leave is not considerable or will be cleared prior to the contract commencing
- ☐ Considerable recreation leave is to be carried forward into the contract period and a leave plan has been agreed. Complete the following:

	Requirement has been met	Check (HR use only)
Leave clearance plan completed	<input type="checkbox"/>	
ESS Leave requests submitted	<input type="checkbox"/>	

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SECTION 5 - POST EMPLOYMENT ARRANGEMENTS

Tick if applicable

Post employment arrangements negotiated

☐

Senior Honorary (Research) Fellow status * – Head of School to support employee's proposal

☐

Honorary title * – Head of School to recommend the award of the title:

☐

Emeritus Professor * - nomination to be made by the Dean

☐

Use of facilities, resources, equipment and other support services post-retirement negotiated
(please specify nature and time period)

☐

Other (please specify)

* **Note:** must be in accordance with the relevant policy

SECTION 6 - APPROVALS AND/OR ACKNOWLEDGEMENT OF ACCEPTANCE

Signature (Head of School or equivalent)

Date (dd/mm/yy)

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Name (Head of School or equivalent) (please print)

Signature (Employee)

Date (dd/mm/yy)

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Name (Employee) (please print)

Signature (Dean or Director)

Date (dd/mm/yy)

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Name (Dean or Director) (please print)

SECTION 7 - HR REVIEW

Signature (Employee Relations Officer)

Date (dd/mm/yy)

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Reviewed by (Employee Relations Officer) (please print)

SECTION 8 - FINAL UNIVERSITY APPROVAL – HR DELEGATION

Signature (HR Director)

Date (dd/mm/yy)

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Name (HR Director) (please print)