



## 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](#).
- 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	<input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/>	Project/ grant	<input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/>	Account	<input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/>	%	<input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/>
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### 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

Details of the allowance(s)

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**SECTION 3 - PRE-RETIREMENT CONTRACT DETAILS (continued)**

**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="text"/>
<input type="checkbox"/>	Part-time for all or part of the contract <i>(please specify periods and FTE)</i>	<input type="text"/>
<input type="checkbox"/>	Work reduced hours with no proportional reduction in salary <i>(please specify the future FTE)</i>	<input type="text"/>
<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 <i>(please specify periods and FTE)</i>	<input type="text"/>

**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 \$  gross

**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:

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**SECTION 4 - LEAVE CLEARANCE**

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"/>	

Leave balances as at       (dd/mm/yy)

Leave Type	Total (hours/days)
Annual Recreation Leave balance	
Accessible <i>pro rata</i> Long Service Leave balance (if eligible)	
Accessible Accrued Long Service Leave balance	
Purchased Leave balance	
Deferred Salary Scheme balance	
TOIL/Flexi balance	
<b>Total Leave balance</b>	

**LEAVE PLAN**

Leave Type	From (dd/mm/yy)	To (dd/mm/yy)	Subtotal (hours/days)
<b>Total leave to be taken</b>			
<b>Total leave remaining at completion of agreed leave plan</b>			

Signature (Employee)

Date (dd/mm/yy)

     

Ext

Name (Employee) (please print)

Signature (Employee Supervisor)

Date (dd/mm/yy)

     

Ext

Name (Employee Supervisor) (please print)

Signature (Approved Delegate) (Head of School, Director 5a)

Date (dd/mm/yy)

     

Ext

Name (Approved Delegate) (please print)

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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

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**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 (*Executive Dean or Director*)

Date (*dd/mm/yy*)

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Name (*Executive Dean or Director*) (*please print*)

**SECTION 7 - HR REVIEW**

Signature (*Employee Relations Adviser*)

Date (*dd/mm/yy*)

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Reviewed by (*Employee Relations Adviser*) (*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*)