



Pre-Retirement Contract Procedure

IMPLEMENTATION

Aim

This procedure prescribes the responsibilities and actions required for a staff member to make an application for a Pre-Retirement Contract of Employment consistent with the [Workforce Management Policy](#) and clause 2.3 of the [University of Adelaide Enterprise Agreement](#).

1 Objectives

- 1.1 To ensure that all pre-retirement contract applications have been approved in accordance with this procedure.

2 Scope and Application

2.1 Inclusions

This procedure only applies to continuing staff members who intend to retire.

2.3 Application

A pre-retirement contract will not exceed three (3) years and the minimum loading payable will be 10% (in accordance with 2.3.1.7(c) of the [University of Adelaide Enterprise Agreement](#).)

The pre-retirement loading:

- will be superannuable.
- forms part of the staff member's gross taxable salary.

Any unused leave balance at the conclusion of the pre-retirement contract will be paid out at an hourly rate inclusive of the pre-retirement loading.

If a staff member accepts a pre-retirement contract they will not be entitled to a redundancy payment or a severance payment.

At the conclusion of a pre-retirement contract the staff member is not to be re-engaged by the University in paid employment for a period of two years from the final date of the pre-retirement contract (other than casual employment).

Workforce Management Handbook	Pre-retirement Contract Procedure	Effective Date:	5 February 2016	Version 1.0
Authorised by	Chief Operating Officer and Vice-President (Services and Resources)	Review Date:	5 February 2019	Page 1 of 4
Warning	This process is uncontrolled when printed. The current version of this document is available on the HR Website.			

3 Process: Negotiating a Pre-Retirement Contract

Person Responsible		Actions
3.1	Staff member and Supervisor	<p>a) Discuss the intention to retire negotiate and discuss the possible terms of a pre-retirement contract.</p> <p>Where the application is to proceed for consideration:</p> <p>b) Apply in writing using the Pre-Retirement Contract Application Form (Appendix A) and forward to the Head of School/Branch for consideration and recommendation (if applicable).</p>
3.2	Head of School/Branch	<p>a) Review the application and if supported, make a recommendation to the Area Manager for consideration ensuring that the recommendation for a contract is in line with the objectives of the Faculty/School/Branch.</p> <p>Note: The respective School/Branch is responsible for the cost of the loading. Loadings will be charged to the same cost centre to which the staff member's salary is charged.</p>
3.3	Area Manager	<p>a) Review the application for pre-retirement contract and the recommendation from the Head of School/Branch, including determination of loading payment.</p>

4 Process: Approving or declining a Pre-Retirement Contract

Person Responsible		Actions
4.1	Area Manager	<p>a) Approve or decline the recommendation with respect to the pre-retirement contract application for professional staff or academic staff; or</p> <p>b) Review the recommendation and make further recommendation to the Vice-Chancellor and President for any pre-retirement contract where the loading and/or ex-gratia payment exceeds 25%.</p> <p>c) Advise the staff member if approval is granted, and forward to the Human Resources Branch to process. If not approved, ensure feedback and reasons for non-approval are given to the staff member.</p> <p>Note: The terms and conditions of the staff member's existing continuing contract of employment will remain unchanged, if the request for a pre-retirement contract is not approved.</p>
4.2	Vice-Chancellor and President	<p>a) Review and approve or decline the application for a pre-retirement contract for a staff member where the loading and/or ex-gratia payment exceeds 25%.</p>

5 Definitions

Area Manager

Area Manager means Deputy Vice-Chancellors, Vice Presidents, Pro Vice-Chancellors, Executive Deans, Director Human Resources, (and a person acting in these positions), and Institute Directors.

6 Useful information and resources

6.1	University related documents and policies University of Adelaide Enterprise Agreement 2014-2017 (as amended) Recruitment Policy Workforce Management Policy Health, Safety and Wellbeing Policy
6.2	Related legislation Age Discrimination Act 2004 (Cth) Disability Discrimination Act 1992 (Cth) Equal Opportunity Act 1984 (SA) Fair Work Act 2009 (Cth) Privacy Act 1988 (Cth) Racial Discrimination Act 1975 (Cth) Sex Discrimination Act 1984 (Cth) Work Health and Safety Act 2012 (SA) Work Health and Safety Regulations 2012 (SA)
6.3	Useful Web-links HR Service Centre

PRE-RETIREMENT CONTRACT APPLICATION FORM

Please complete, SCAN and [EMAIL](#) to Human Resources Branch, Division of Services and Resources

This form is to be used by a staff member to apply for a pre-retirement contract.

STAFF MEMBER DETAILS

Staff ID		School/Branch	
Title	Family name	Given names	
Position Title			Position no. (if known)
Current hours of work	<input type="checkbox"/> Full time <input type="checkbox"/> Part Time		If part-time, indicate weekly hrs (Note – Full time = 36.75 hrs)
			hrs

PROPOSED PRE-RETIREMENT CONTRACT DETAILS

Proposed loading (Min = 10%)	<input type="checkbox"/> 10 % (minimum) or %											
Proposed commencement date	Proposed end date											
Weekly hours												
Will the weekly hours change as part of the pre-retirement contract?	<input type="checkbox"/> No <input type="checkbox"/> Yes (If yes, complete the Work pattern table below. Standard hrs per day = 7hrs 21 mins											
	Work pattern week 1 (Proposed)											
	Mon	Tues	Wed	Thur	Fri	Total hrs	Work pattern week 2 (Pay week)					
							Mon	Tues	Wed	Thur	Fri	Total hrs
Hrs											Pay day	
Mins												
Other conditions (attach documentation if applicable)												

Staff member signature		Date	
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Supervisor recommendation			
Supervisor	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended		
Comments to support application			
Name			
Signature		Date	

Head of School/Branch	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended		
Comments to support application			
Name			
Signature		Date	

Area Manager authorisation	<input type="checkbox"/> Approved <input type="checkbox"/> Not approved		
Comments (If not approved)			
Name			
Signature		Date	

For Level E only

Vice-Chancellor & President	<input type="checkbox"/> Approved <input type="checkbox"/> Not approved		
Comments (If not approved)			
Name			
Signature		Date	