



**A signed notice of intention to participate in the three-year phased retirement program (PRP) must be submitted to your unit head *at least one year in advance* of the proposed commencement date (which shall be July 1).**

Portions of this form can be completed on the screen. Once you have completed YOUR information, print this form, attach any necessary documents and have the form signed by the appropriate Unit Head, Dean and Provost.

**1. Personnel Information**

**Name:**

**Personnel No:**

**Faculty:**

**Department/Division:**

**Salary at June 30<sup>th</sup> prior to entering PRP:**

**Date of Birth (mm/dd/yyyy):**

**2. Notice of Intention to Enter Phased Retirement Program**

**Enter the starting year and ending year of your PRP below:**

I wish to enter the Phased Retirement Program with a three-year cumulative appointment, beginning July 1, \_\_\_\_\_ and ending on June 30, \_\_\_\_\_.

**Please specify total percentage appointment: \_\_\_\_\_ %**

***Cumulative appointment must be at least 150% and not more than 200%***

**3. Phased Retirement Supplement Options**

(To be completed by the faculty member or librarian)

Faculty members or librarians who elect to participate in the PRP receive 75% of their salary as of June 30 immediately prior to commencement of phased retirement as a supplement. You must **choose one** of the three options below:

**I wish to receive my PRP salary supplement as:**

- a) A supplement payable at the end of the three-year period as a Retiring Allowance sheltered to the extent possible under retiring allowance transfer rules (\$2000 for each year of service with University prior to 1996 plus \$1,500 for each year of service prior to 1989 when not a member of the pension plan)
- b) A retiring allowance payable at the end of three-year period in an amount equal to the maximum amount payable to an RRSP under above retiring allowance transfer rules, with balance paid as T4 income in three equal installments at the beginning of each year (i.e., in July).
- c) A supplement payable as T4 income in three equal installments at the beginning of each year (i.e., in July).

#### 4. Application for Research and Study Leave during Phased Retirement

(To be completed by the faculty member or librarian)

Faculty members and librarians who wish to take an earned research and study leave during PRP must apply at the time of giving notice of entering into the phased retirement so that the leave can be considered and approved in the context of the planning process for the phased retirement.

Those who wish to take an earned research and study leave during PRP are required to submit a research and study leave proposal for approval in accordance with existing policies and procedures and must submit a written report to the unit head or Chief Librarian at the end of the leave.

Please **choose one** of the three options below:

I wish to apply for the following research and study leave to be taken during PRP. A copy of my research leave proposal and a *Request for Leave Form* are attached:

Option	From (mm/dd/yyyy)	To (mm/dd/yyyy)
(a) 6-month leave at 100% of salary to be taken from:		
(b) 12-month leave at 82.5% of salary to be taken from:		
(c) 12-month split leave at 82.5% of salary		
the first 6 months to be taken from:		
the second 6 months to be taken:		

#### Notes:

(1) Every request for research and study leave to be taken during PRP requires the approval of the Provost. A copy of the leave proposal should be included with the *Request for Leave Form* for review by the Provost.

(2) Requests for split leave must be based on an academic rationale for the timing of the leaves and require departmental, decanal and provostial approval to ensure consistency with the academic priorities of the unit.

#### 5. Allocation of Duties

(To be completed by the head of the academic unit in consultation with the faculty member or librarian)

A full range of normal pre-PRP duties are to be undertaken. Please indicate **agreed percentage allocation of duties** over the duration of the appointment as assigned by the unit head of the academic unit. Research and study leaves should be included in the total percentage of appointment.

Note: Actual teaching and service commitments should be specified. In determining total appointment, a 6-month leave is considered equivalent to 50%; a 12-month leave is considered equivalent to 100%; a 12-month split leave is considered two 50% leaves.

Academic Year	Annual Appointment %	Teaching %	Research %	Service %	Specify teaching and service commitments
					<b>TOTAL</b>

This total should be the same as the total on page 1, "2. Notice of Intention to Enter the Phased Retirement Program".

**6. Consistency with Academic Goals and Objectives**

(To be completed by the head of the academic unit)

Please describe how the proposal being recommended for the three year phased retirement is consistent with the academic goals and objectives of the academic unit:

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**7. Space and Support Considerations**

(To be completed by the Head of the Academic Unit)

Please confirm that you have discussed issues of office space, laboratory space and other support over the duration of the appointment with the applicant and that this has been clearly specified in writing.

A copy of the letter is appended.

## 8. Appointment as Emeritus / Emerita

If eligible, I wish to be appointed to rank of Emeritus/Emerita in accordance with the Policy on Emeritus/Emerita Status. I understand that eligibility will be confirmed by the Office of the Vice-President & Provost.

No                      Yes                      If "Yes", my title will be \_\_\_\_\_

## 9. Sign Off by Faculty Member or Librarian and the Irrevocability of the Agreement

- A. I have read the foregoing and agree to the stipulations outlined above. I understand that entering into the phased retirement program will set a retirement date of June 30, \_\_\_\_\_.
- B. I understand that this notice can only be revoked by giving my Unit Head written notice of revocation within one month of the date I gave notice of intention to retire to my Unit Head.
- C. I gave notice of my intention to retire to my Unit Head on: \_\_\_\_\_  
and the one month period during which I may revoke that intention ends on: \_\_\_\_\_.
- D. If I do not revoke my notice of intention to retire within the one month period the above retirement becomes irrevocable. Notices of intention which are accepted with less than 12 months notice of such intention are irrevocable.

\_\_\_\_\_  
**Applicant's Signature:**

\_\_\_\_\_  
**Date:**

**NOTE:** Information on the process and procedures for appointment to the rank of Professor Emeritus can be found at <http://www.utoronto.ca/govcncl/pap/policies/emeritus.html>

## 9. Sign Off and Approvals by Unit Head, Dean in multi-departmental division and the Office of the Provost

I hereby accept your notice of intention to enter the three-year phased retirement program and notice to retire on:

\_\_\_\_\_  
**Signature of Unit Head**

\_\_\_\_\_  
**Date:**

**For Multi departmental divisions:**

\_\_\_\_\_  
**Approved by the Dean**

\_\_\_\_\_  
**Date:**

\_\_\_\_\_  
**Approved by the Provost**

\_\_\_\_\_  
**Date:**

## 10. Information Sharing

- 1. The Academic Retiree Centre at the University of Toronto will be provided with your institutional email address. If you do NOT want your institutional email address provided to the Academic Retiree Centre, Please check here.
- 2. The University of Toronto Faculty Association (UTFA) will be notified that you have given notice of your intent to enter phased retirement. If you do NOT want UTFA to be notified that you have given notice of your intent to enter phased retirement, please check here.
- 3. The Retired Academics and Librarians at the University of Toronto (RALUT) will be provided with your institutional email address. If you do NOT want your institutional email address provided to RALUT, please check here.