
Appendix “A” ¹

Voluntary Phased Retirement Program Notice of Intention to Participate

A signed Notice of Intention to Participate in the Voluntary Phased Retirement Program (VPRP) must be submitted to your Dean (through the Department Head in a departmentalized faculty) or the University Librarian (for Librarians and Archivists) *at least one year in advance* of the proposed commencement date (which shall be July 1).

Once you have completed YOUR information, print this form, attach any necessary documents, and have the form signed by the appropriate Dean or University Librarian (as applicable), and the Provost and Vice- Principal Academic.

1. Personnel Information

Name (First / Last)	
Employee No.	
Faculty	
Department/School	
Date of Birth (mm/dd/yyyy)	

2. Notice of Intention to Participate in the Voluntary Phased Retirement Program

Enter the starting year and ending year of your proposed VPRP below:

I wish to enter the Voluntary Phased Retirement Program for a three-year phased retirement period,
beginning July 1, 20_____ and ending on June 30, 20_____.

¹ This Appendix “A” may be amended by the Association and the University from time to time.

3. Voluntary Phased Retirement Supplement Option

(To be completed by the Faculty Member, Librarian or Archivist)

Eligibility for and determination of the amount of the VPRP retirement supplement shall be determined in accordance with the VPRP. The election below shall be applied to the amount of retirement supplement that you are eligible to receive under the VPRP. You must **choose one** of the three options below:

I wish to receive my VPRP retirement supplement as:

- (a) A supplement payable as employment income in three equal installments at the end of each year of the phased retirement period (i.e., in June).
- (b) A retiring allowance payable at the end of phased retirement period (i.e., in June).
- (c) A retiring allowance payable in two installments at the end of phased retirement period. One-half paid in the month of July after the end of the phased retirement period and the second half paid in the month of January that follows.

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4. Application for Academic Leave during Phased Retirement

(To be completed by the Faculty Member, Librarian or Archivist)

Faculty Members, Librarians and Archivists who wish to take an earned Academic Leave during VPRP must apply at the time of giving notice of intention to participate in the VPRP so that the leave can be considered and approved in the context of the planning process for the phased retirement.

Note: The workload allocation (Section 5 of this form) during the period of Academic Leave is calculated at a 100% appointment level. Appointment % is distinct from salary levels during academic leave.

Please check the box(es) of your intended Academic Leave(s), and include a copy of your Application for Academic Leave.

Year One		Year Two		Year Three	
[insert academic year]		[insert academic year]		[insert academic year]	
July to December	January to June	July to December	January to June	July to December	January to June
I wish to have my pay evenly distributed over 12-months* <input type="checkbox"/>		I wish to have my pay evenly distributed over 12-months* <input type="checkbox"/>		I wish to have my pay evenly distributed over 12-months* <input type="checkbox"/>	

*Your salary will normally be paid based on your monthly workload. If you wish to have your pay evenly distributed over twelve (12) months for any of the years in which you are taking a six-month academic leave, please check the applicable box above.

5. Allocation of Duties

(To be completed by the Unit Head in consultation with the Faculty Member, Librarian or Archivist)

A full range of normal pre-VPRP duties are to be undertaken proportionate to the percentage appointment. Please indicate **agreed percentage allocation of duties** over the duration of the appointment as assigned by the Unit Head. Academic 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%.

Academic Year	Academic Leave (6mth=50% 1yr=100%)	Teaching %	Research %	Service %	Total Workload %	Specify teaching and service commitments

TOTAL

Please specify total percentage cumulative appointment: ____% *Cumulative appointment must be at least 150% and not more than 200% of a FTE for Librarians, Archivists, or Faculty Members holding a tenured appointment over the phased retirement period. The cumulative appointment for a Continuing Adjunct must be no less than 50% and no more than 67% of their cumulative assigned FTE over the phased retirement period. The minimum appointment requirements of the VPRP must also be considered.*

6. Consistency with Academic Goals and Objectives

(To be completed by the Unit Head)

Please describe how the proposal being recommended for the phased retirement period is compatible with the interests of the Unit or the service obligations of the Library/Archives:

7. Space and Support Considerations

(To be completed by the Unit Head)

Please confirm that you have discussed issues of feasibility based on departmental resources including office space, laboratory space and other support over the duration of the phased retirement period with the applicant and that this has been clearly specified in writing.

A copy of the letter is appended ☐

8. Sign Off by Faculty Member, Librarian or Archivist and Irrevocability

I have read the foregoing and agree to the stipulations outlined above and in the letter of agreement establishing the VPRP. I understand that once accepted by the University, the VPRP will set an irrevocable retirement date of June 30, 20_____.

Applicant's Signature: _____

Date: _____

9. Sign Off and Approvals by Unit Head, Dean or University Librarian, and the Office of the Vice-Principal and Provost

I hereby accept your notice of intention to participate in the voluntary phased retirement program and notice to retire on:

Signature of Unit Head

Date:

Approved by the Dean/University Librarian

Date:

Approved by the Provost and Vice-Principal Academic

Date:

Copy: Official File, QUFA