

Administrative Procedure 428 - Retirement Transition Strategy Program

Background

The Transition to Retirement Program (TRP) is designed to help qualified certificated employees access pension benefits in the final few months of their employment. This program applies to situations where the teacher retires in order to collect a pension or retires in order to withdraw their pension from the Alberta Teachers Retirement Fund (ATRF).

Procedures

1. General Practices
 - 1.1. The TRP is available to certificated employees who hold continuing contracts, are covered by the ATRF, and who are actively working at the time of the application to the TRP.
 - 1.2. Questions regarding the TRP are to be directed to the Assistant Superintendent of Human Services.
 - 1.3. It is the sole responsibility of the teacher to obtain all information, estimations and advice from ATRF prior to making an application for this retirement transition opportunity. It is strongly advised that applicants contact their pension plan representative to discuss:
 - 1.3.1. Pension eligibility,
 - 1.3.2. Personal impact of this program, and
 - 1.3.3. Benefit entitlement under this program.
 - 1.4. Any staff who are considering retirement through the TRP are encouraged to contact their local ATA Pension Officer.
 - 1.5. Effective the first day following the retirement effective date, the Early Retiree Teacher is enrolled back into the ASEBP benefit plan with full benefits (where available) as a condition of employment.
 - 1.6. Approved TRP participants shall resign from their continuing teacher contract by completing the Transition to Retirement Application Form and shall be re-hired on a contract that ends no later than the end of the school year and/or no later than one school year as determined by mutual agreement.
 - 1.7. TRP participants shall maintain previously banked leaves and be entitled to their full sick leave provision.

2. Collecting Pension While Working

- 2.1. Applicants shall be at least 55 years of age in order to collect pension.
- 2.2. To apply, the teacher shall complete the Teacher Retirement Transition Application.
- 2.3. TRC Applicants shall submit their application to the Superintendent and Assistant Superintendent of Human Services by:
 - 2.3.1. March 31 if choosing to teach up to 0.6 FTE the following school year (resignation date June 30 of the current year), or
 - 2.3.2. November 30 if choosing to teach to full-time for the remainder of that school year to June 30 (resignation/retirement date December 31 of the current year), or
 - 2.3.3. At a reasonable date for less than a 0.6 FTE assignment to the end of a school year, where the retirement date is after January 1 and before June 30 of a particular year.
- 2.4. Approval of TRP requests shall be at the sole discretion of the Superintendent in consultation with the Principal/Supervisor.
 - 2.4.1. If seeking a part-time assignment in the following school year, this will only be considered if in the best interests of the school and students, and can be reasonably accommodated; it is not the intent to create two (2) part-time assignments in exchange for one (1) full-time assignment.
- 2.5. Once approved for the TRP, the participant shall receive a teaching contract with an agreed-upon end date evidenced by a resignation letter.
- 2.6. Generally, a retirement agreement will not extend past one (1) school year and must include a letter of resignation with the final date of employment.

3. Withdrawing Pension from ATRF

- 3.1. Applicants shall be younger than 55 years of age in order to withdraw their pension from ATRF.
- 3.2. To apply, the teacher shall complete the Teacher Retirement Transition Application.
- 3.3. TRC Applicants shall submit their application at least thirty (30) days prior to the applicant's 55 birthday to the Superintendent and Assistant Superintendent of Human Services.

- 3.4. Approval of TRP requests shall be at the discretion of the Superintendent in consultation with the Principal/Supervisor.
- 3.5. Once approved for the TRP, the participant shall receive a contract with an agreed-upon end date that ends no later than the end of the current school year, and evidenced by a resignation letter with the final date of employment.
- 3.6. Generally, a retirement agreement will not extend past one (1) school year.

Reference: Section 18, 33, 52, 53, 68, 196, 197, 204, 222, 225 Education Act

Certification of Teachers Regulation 84/2019)
Practice Review of Teachers Regulation 92/2019)
Ministerial Order 028/2020 – Student Learning
Teaching Quality Standard
Guide to Education ECS to Grade 12
Practice Review Bylaws
Collective Agreements

Effective: 2010-03-17

Amended: 2020-08-30; 2022-01-01; 2022-02-08