

Some tips about the actual process of retiring from DoE

Jacqueline Koob

Retirement will have multiple impacts on your life, mostly very positive. However, despite having given advice on it to other staff for years, some of us can still reach the final stages of our career without quite knowing what actually happens and in what order etc. As a recent retiree, I will try to fill in some of those gaps and apologise in advance for spelling out what may be very obvious to everyone.

1. Accessing your super

Surprisingly it seems that some teachers still harbour the misconception that retirement from the Department automatically triggers the beginning of their superannuation payment and that they will move seamlessly from one income source to the next. Knowing this is incorrect, I hope you will have spoken with your super fund and taken financial advice in the five years leading up to retirement. This is essential not only to ensure that you are maximising your benefits but they will also guide you through and carry out most of the steps in moving you from the status of super contributor to super receiver.

Apart from a general exhortation to make the most of these advisors, as early as possible, I offer only one piece of financial advice. *Be aware that there will be a gap of 4-6 weeks between the cessation of your salary and the first inflow from your super income stream* (mine came through in five weeks). So do ensure that you have sufficient accessible funds in your bank to tide you over. SASS cannot actually release the money and start setting up your accounts until the DoE confirms that you have finished.

2. Submitting your Notice of Retirement

Once the big decision is made, you need to complete a Notice of Retirement Form. As always, this is well buried in the intranet, so for your quick reference go to: *Staff Portal Home page → Inside the Department A-Z → Human Resources → Quick Links – For School Teachers → Pay Leave & Benefits → Employee Forms → Notice of Resignation/Retirement.*

The form contains some fairly clear instructions on

- When to submit it (at least one month's notice)
- Who to submit it to (Director, Public Schools or supervisor)
- Advising your Super fund
- How to apply for casual teaching approval etc.

3. Relinquishing your position

Information on this has been added to the Notice of Resignation/Retirement form since I submitted mine, which is a great step forward. There is a link to a fact sheet. It can also be found on the *Pay Leave and Benefits* page as identified above, under *Leave Prior to Retirement.*

In brief, if you are certain you won't be returning to your Principal position but wish to use the benefit of your accrued LSL before dropping off the payroll, you can free up your position by writing an email or letter stating that you wish to relinquish it from a certain date. This written notice is now to be submitted to your Director (rather than to HR in general, as previously required).

4. When to tell people you are going?

This will depend entirely on your own circumstances. Some people talk about their plans for many years before, while others may make a late decision due to a change in their health or circumstances. There will be no perfect time. However, you may wish to consider whether a long lead-in will unsettle the student and parent body and parents of prospective students, as they worry about changes of direction in the school. On the other hand, community and staff usually appreciate the news being shared at least a couple of months in advance, which also allows the opportunity to offer some reassurances and information about who will take over.

4. Farewells

Again, the amount and nature of these will be a very individual question. Like most rituals it can be helpful both to you and the school body to have some formal recognition of the change process, an acknowledgement of your contribution and achievements, and a form of closure. Your Director should arrange for your medal – but if you take leave it can't be presented until your actual retirement has taken effect.

5. Preparing for handover

The more of this you can do the better. As a minimum try to ensure that all your financial processes are clear and transparent, that there is a clear 'map' of where all school information, policies etc can be found, and that you arrange as far as possible that access to all the websites you use is transferred or passwords securely passed on. If there will be a Relieving or Acting Principal from within your school for a while this process may be much easier. I spent an intensive term trying to pass on everything I knew to my Deputy. If it is possible to meet with your replacement to pass on info and insights that you may not wish to set down in writing, it is well worth doing.

6. Communication with NESAs

NESA will continue sending you all their emails until the DoE informs them of a new Principal. Communication between DoE and NESAs may be slow so you may be forwarding a bit. The new (or relieving) principal can also request access if they know what to ask for.

7. What happens on the day?

Probably NOTHING that you notice. You may go out with a brass band on the actual date of retirement, but for many of us the farewells and handovers are well past as school holidays and long service leave etc intervene. While HR may be processing your retirement in the background, you may experience the day as an absence of something to do. Being away on a holiday or having a celebration of some kind helps to emphasise the positives.

8. Email and access

Shortly after your retirement date you will receive a letter from DoE telling you that your retirement has been accepted and that your application for casual teaching is being assessed (if you applied). It also tells you that access to the DoE's IT services will cease 12 weeks after leaving the Department. There is no guarantee you will get the same email address and access if you reactivate later as a casual. As a result you really need to do some casual work in the first 12 weeks if you want to retain the same access details. What they don't tell you is that you also have to work at least *once every three months* to keep it. However, if this does lapse, contact EdConnect to request a Reset.

9. Accreditation

Principals will by now have received accreditation as 'Proficient Teachers', but if you intend to continue to work for DoE at all, you will need to maintain it. Bear in mind though that if you work casually you can ask NESAs to extend your maintenance period to seven years, so for most of us the maintenance process will not be a big issue. I suggest you send them an email with a copy of your first casual payslip. However, to work in schools don't forget you will also need to maintain currency of your Child Protection Training, e-emergency, CPR and anaphylaxis training.

Good luck and enjoy your retirement!

Contributor details

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Jacqueline was Principal of Concord High School from 2008-2017. Since retiring she has enjoyed being able to spend more time with her family and travelling. These interests fortunately coincide well as her children live overseas. She has also continued her love of languages, taking up the learning of Spanish, and renewing her love of music. She has also done some mentoring.