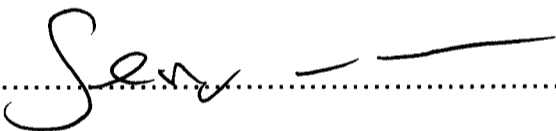


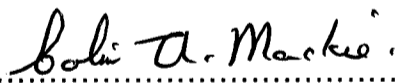
PERTH AND KINROSS COUNCIL
JOINT NEGOTIATING COMMITTEE FOR TEACHING STAFF
LOCAL AGREEMENT
“The Winding Down Scheme”

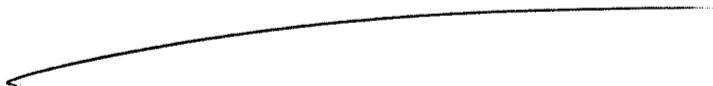
In terms of the Local Recognition and Procedure Agreement, it is accepted by all signatories acting on behalf of the Council and the recognised unions that this agreement is a binding local agreement effective from 13 November 2002. This supersedes relevant provisions within the National Agreement and constitutes a formal amendment to the terms and conditions of employment for teaching employees within Perth and Kinross Council.

G Waddell, Executive Director (Education & Children’s Services), on behalf of
Perth and Kinross Council:

.....


C Mackie (EIS), on behalf of Teachers’ Trade Unions:

.....


.....




**Joint Negotiating Committee
for Teaching Staff
Meeting of 28 October 2002**

**The McCrone Agreement:
The Winding Down Scheme**



The Winding Down Scheme

1 Background

The regulations which set out the Scottish Teachers' Superannuation Scheme have been amended by the Teachers' Superannuation (Scotland) Amendment Regulations 2002. This now introduces a Winding Down Scheme as part of the agreement "A Teaching Profession for the 21st Century".

The Winding Down Scheme is a phased retirement option which offers those members approaching retirement age the opportunity to continue in employment on a part-time basis whilst protecting their overall final retirement pension entitlement.

2 Regulations

The Scottish Public Pensions Agency sets out regulations covering potential applicants. These are:

- Applicants must be aged 56 or over.
- Applicants must have a minimum of 25 years teaching service (ie must have had a teaching contract for at least 25 years).
- The last 10 years must have been full-time reckonable service.
- A credit of up to 5 years will be allowed for a break or breaks in service.
- The part-time Winding Down contract must be at least 0.5 FTE.
- It will only be possible to remain in the Winding Down Scheme for a maximum of 4 years.
- Pensionable contributions of both employer and employee are based on actual salaries.
- The final pensionable salary at retiral will be the salary received in the 365 days (revalued using the retail price index) prior to entering the "Winding Down" contract.
- Each year of "Winding Down" counts as one full year of reckonable service.
- It is possible to "wind down" and simultaneously "step down" to a less senior job.

The Winding Down Scheme is available to all teachers who meet the eligible criteria provided that the employer has agreed to offer the part-time contracts which fit within the scheme.

3 Perth & Kinross Policy

The following policy framework will operate within Perth & Kinross -

- All teaching staff who meet the age and service criteria are eligible to apply, including those in promoted posts.
- There is no automatic entitlement to phased retirement on the Winding Down Scheme and no precedent will be set by the approval of any particular individual application.
- Each application will be considered individually against a clear set of criteria, and will take account of the exigencies of the education service at the time of application.
- There will be no cost to the Authority in permitting phased retirement on the Winding Down Scheme.
- Part-time contracts under Winding Down Scheme arrangements will be effective only once the remaining part of the job has been filled, if this is necessary.
- The number of hours to be worked in the part-time contract will be part of the request and will be taken into account in the Authority's decision. The Authority has the right to respond with phased retirement arrangements on a different number of hours.
- A phased retirement job would normally be in the existing school, although the Authority reserves the right to give approval on the basis of a job in a different school.
- Phased retirement arrangements will normally start at the beginning of a school session. Applications will be considered mainly in March in line with the annual staffing exercise. However, it will be possible to apply for phased retirement at other times of the year and these would be considered on an individual basis.
- Requests to change the level of "winding down" contract (either a further reduction in hours or an increase in hours) need annual applications.
- It will be possible for teachers on "winding down" contracts to work as casual supply teachers for the remaining time within SPPA regulations.

4 Criteria for Selecting Participants

It is essential that there is a clear set of criteria against which all applications for the Winding Down Scheme will be assessed. In Perth & Kinross the criteria which will apply will be -

- Applications will be considered in terms of the impact on the whole education service as well as on the individual school.
- Applicants in promoted posts will be expected to step down if they wish to participate in the Winding Down Scheme.
- The requested job and number of hours must be available in a school within the Authority.
- There must be no additional financial implications for the Authority (with the exception of those stepping down and the potential difference in pension contributions).

- Confirmation that there will be no loss of quality in provision as a result of the proposed Winding Down arrangement.
- Applicants must be willing to work the 0.5 FTE at the times agreed with the school management. This will be reviewed annually.
- Where applications are approved, this will be subject to the filling of the remaining part of the job where this is necessary.

5 The Role of the Head Teacher

Applications from individual teachers must be accompanied by a statement from the Head Teacher indicating knowledge of the application and giving factual information about the implications of the application in that particular school.

Head Teachers will consult with the individual teacher before completing this section of the application form, and will comment in terms of school staffing requirements only.

6 The Role of the Authority

Decisions on applications for phased retirement will be made by managers within Education & Children's Services. This will be based against the criteria outlined above.

The Authority will respond in writing to all applications for phased retirement, and explain the reasons in cases which are not approved. Teachers will be able to make repeat applications, however the Authority's decision is final in relation to each specific application.

7 How to Apply

Applications must be made by completing the Authority's application form. This should be accompanied by a statement from the Head Teacher of the school in which the applicant is located.

The Joint Negotiating Committee are asked to approve the above policy and criteria in which the Perth & Kinross Council Winding Down Scheme will operate.