

WINDING DOWN SCHEME

POLICY ON PHASED RETIREMENT OPTION FOR TEACHERS

(IN TERMS OF THE SCOTTISH PUBLIC PENSIONS AGENCY 'S (SPPA'S) WINDING DOWN SCHEME)

1 DESCRIPTION

The Agreement "A Teaching Profession for the 21st Century" (also referred to as the McCrone Agreement) introduced a Winding Down Scheme, to which teachers who meet the criteria could apply. It is a phased retirement option, which allows teachers to continue in employment on a part-time basis and receive the corresponding salary on a pro rata basis, while protecting their overall final retirement pension entitlement.

Aberdeenshire Council's policy on Phased Retirement has been drafted to fit within the Winding Down Scheme, and will be referred to as the "Phased Retirement Policy".

2 REGULATIONS

Scottish Public Pensions Agency Regulations

- Applicants must be aged 56 or over.
- Applicants must have a minimum of 25 years service (of which the last 10 years must have been full-time reckonable service). It should be noted that a credit of up to 5 years' service for breaks in service will count as qualifying service.
- The part-time "winding down" contract must be at least 0.5 FTE.
- It will only be possible to remain in "winding down" employment for a maximum of 4 years. If you return to full time teaching, it will not be possible to retain the full time service credit awarded whilst in winding down employment.
- Pension contributions of both employer and employee are based on the actual salaries on a "winding down" contract.
- The final pensionable salary at retiral will be the salary received in the 365 days (re-valued 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 post of lesser responsibility.

Please note that this is a summary of the regulations at time of writing, and applicants should consult the actual regulations (available in each school or from the SPPA) for detailed information. Individual queries should be directed to SPPA.

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

Aberdeenshire Council’s Policy on Phased Retirement

- All teaching staff who meet the age and service criteria are eligible to apply, including those in promoted posts.
- Applications for phased retirement should be lodged no later than the end of January for implementation in August of the following session.
- Teachers are entitled to apply for phased retirement, although there can be no guarantee that applications will be approved. Each application will be considered on its own merits and in light of the circumstances current at the likely date of implementation, and will take account of the exigencies of the education service at the time of application. No phased retirement arrangement will begin until such time as the arrangements are in place to cover the remaining portion of the job. The Authority will make every effort to fill the post by advertising up to a maximum of three times per school session. However if the recruitment process is unsuccessful the teacher will be obliged to re-apply for phased retirement in the following session.
- It is possible to apply to “step down” to another job e.g. teacher, simultaneously with phased retirement, provided that there is a suitable vacancy and no financial implications for the Authority.
- Part-time phased retirement contracts under these arrangements will be effective only once the remaining part of the job has been filled, where 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. Applicants should apply to work between a minimum of 0.5 FTE and a maximum of 0.8 FTE. The Authority has the right to respond with phased retirement arrangements on a different number of hours.
- A phased retirement post would normally be in the existing school.
- Practical arrangements reflecting good practice in terms of liaison and communication will be made and are a matter for agreement within schools.
- It will be possible for teachers on phased retirement contracts to work as casual relief teachers for the remaining time within SPPA regulations.

3 ROLE OF HEAD TEACHER AND AUTHORITY IN PROCESS

- Applications from individual teachers must be accompanied by a statement from the Head Teacher indicating knowledge of application, and giving factual information about the staffing 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.

4 HOW TO APPLY

Applications must be made by completing the Authority's application form, a copy of which is attached to this policy.

5 DECISION

- Decisions on applications for phased retirement will be made by Area Senior Education and Recreation Officers, in the context of the staffing requirements of the establishment and of the service.
- Decisions may include an offer of phased retirement with a different number of hours.
- The Authority will communicate its decision on each application for phased retirement in writing.
- Offers of phased retirement will require written confirmation from teachers within 14 days of the date of the offer letter that they wish to proceed.
- Offers will be subject to recruiting a suitable replacement for the remainder of the post.
- The Authority's decision on each application is final, but teachers can re-apply in the following session.