

Summary of the main changes to the Managing Retirement guidance

The Managing Retirement guidance accompanies the Managing Retirement policy and contains the administrative procedures of related schemes (Flexible Retirement, Teachers' Phased Retirement and Teachers' Winding Down). These all required certain updates, as follows:-

Flexible Retirement Scheme procedure

Detail has been added under Stage 2 to explain what should occur if the employee's request is linked to a caring responsibility, namely that the Smarter Working guidance should be referred to on how a statutory request for flexible working is considered. Reference to this has also been included under paragraph 2 in the Flexible Retirement guidance notes at Appendix 3.

Under Stage 3(i) of the procedure, reference to the former Job Share policy (non-teaching) has been removed, as that policy is no longer in existence, with those who wish to reduce their hours to now be placed on a part-time contract. Paragraph 5 of the guidance notes at Appendix 3 of the document has also been appropriately amended to reflect this.

Under Stages 3(i) and 3(ii) of the procedure, a line has been added to state that it is the Service Manager who is now the person authorised to approve cases, rather than the manager. This is to reflect the wording of the relevant Council pension discretion.

Teachers' Phased Retirement scheme procedure

This has been updated to reflect the incorporation of an additional form to record that authority has been given by the Head of Service for the case to proceed. Other minor amendments were made to the wording to reflect the process as it currently stands.

Teachers' Winding Down scheme procedure

This has had one minor amendment at step 3 with the line about the application form being sent to the teacher having been taken out as it is now the case that the form is down loaded by the teacher from the SPPA website.

As well as changes to the related scheme procedures, there were some other minor changes made to the guidance as follows:-

Other changes

The paragraph under Section 4 in the guidance on 'Over state pension age and pension contributions, tax and national insurance', has had an update to reflect the fact that the normal retirement age in relation to the new pension schemes equates to the employee's state pension age (rather than 65) and it indicates that employees

reaching their state pension age will not pay national insurance contributions beyond that if they continue working, but will pay income tax. This applies to both pension schemes, although it is mentioned that there are still teaching employees with protection or tapered protection remaining in the previous teacher schemes (STSS), with a different retirement age.

The paragraph on 'Pension Arrangements and Benefits' under Section 4 has been amended with the up-to-date contact details of the two pension schemes.

Some other necessary minor updating has been undertaken to the document and the various appendices.