

News Summer '07

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For more information on any of the articles in your TP News log on to www.teacherspensions.co.uk

Effective workforce management

As an employer of teachers or lecturers who are members of the Teachers' Pension Scheme (TPS), you should ensure that your employees are well informed of the pension options available to them. You should also consider how these options can support your own effective management of your workforce.

It is important that TPS members have relevant and timely information to enable them to make informed decisions about their retirement plans. The recent changes to the TPS mean that there are now new options available to members to draw some of their pension whilst working (known as phased retirement); wind down in the years leading up to retirement while protecting their pension benefits; buy Additional Pension Benefits (APB) up to a maximum of £5,000 annual pension whilst in pensionable employment and under normal pension age; and an option to increase the amount of lump sum they take at retirement.

Employers can contribute towards APB on behalf of teachers or lecturers and could use this option, for example, as an incentive to encourage retention or to enhance the pension benefits of those whose employment is being terminated early but to whom the employer does not want to award premature retirement benefits under the TPS.

Local authority employers also have a real interest in ensuring that schools (in particular leadership teams, bursars and governing bodies) also understand how the TPS can help support flexible workforce planning.

More detail about the additional pension arrangements can be found in the fact sheet **Additional Pension**. The **Employer Guide** describes the various retirement options for scheme members. It also outlines the application process and the employer role in this.

Premature Retirement

The Premature Retirement Compensation arrangements remain available to scheme members aged 50 or over and whose employment has been terminated on the grounds of redundancy or organisational efficiency. The APB facility may be used by employers in addition to, or as an alternative to, an award of premature retirement compensation under Part V of the Teachers (Compensation for Redundancy and Premature Retirement) Regulations 1997.

Information for **HE Institutions** can be found on the TPS website bulletin board.



Retirement applications - Commutation

Employers are reminded that the pension to lump sum commutation option does not apply to premature retirement compensation benefits.

How are we doing?

The Teachers' Pension User Group meets every six months and allows employer representatives to raise with TP issues or concerns about the administration of the scheme - and to discuss with us how we can improve the service. We are now merging this group with the Communications Group to form a new **Teachers' Pensions Administration Forum (TPAF)**. The TPAF will have a strategic role to consider new administration initiatives proposed by the DfES and TP, to discuss and raise issues on scheme administration, and to maintain the agreed communication protocol and strategy. It is your forum to provide feedback on any aspect of scheme administration. TPAF will meet twice a year alternating between London and Darlington, with the first London meeting in November 2007.

Your contact on the TPAF is one of the following:

Association of Colleges: **nathan_lucas@aoc.co.uk**

Foundation and Aided Schools National Association: **laupton@btinternet.com**

Independent School Bursars Association:

alison@theisba.org.uk

Local Government Employers:

james.mensah@lge.gov.uk

Sixth Form Colleges' Forum:

David.Maycock@lge.gov.uk

Universities and Colleges Employers Association:

Elaine.Schegar@ucea.ac.uk

If your organisation is not represented please feedback any comments direct to TP's Employer Relationship Managers –

chris.mcmaster@capita.co.uk or

vanda.patrick@capita.co.uk

Employer Focus Groups

Following two successful pilot exercises earlier this year, we will now also be setting up three regional Employer Focus Groups. These groups will allow TP and the DfES to have detailed discussions with employers on how we are administering the scheme. It will be your chance to directly feedback your experiences (good and bad), and to influence how we administer the scheme. We are looking for employers to take part in these groups. They will meet twice a year, and we will rotate membership, so that the commitment from individual employers won't be great. To be involved in the groups please contact **carol.bottomley@dfes.gsi.gov.uk**.

Employer seminars

Our Employer Relationship Managers are **Vanda Patrick** and **Chris McMaster**. If you have any issues or concerns about the administration of the scheme or wish to consider any of the services TP can offer, please contact:

+ vanda.patrick@capita.co.uk or telephone 07920594370; or

+ chris.mcmaster@capita.co.uk or telephone 07795827085.

The dates and venues for the Employer Seminars are detailed below.

Date	Venue
17 July	The Queens Hotel, Leeds
19 July	The Suites Hotel, Knowsley, Liverpool
4 September	The Grand Harbour Hotel, Southampton
6 September	Orton Hall Hotel, Peterborough
9 October	Thistle Hotel, Cheltenham
11 October	Duke of Cornwall Hotel, Plymouth
13 November	The Crowne Plaza Hotel, Birmingham
15 November	Victoria and Albert Hotel, Manchester
4 December	The Victoria Park Plaza, London
5 December	The Victoria Park Plaza, London
6 December	The Victoria Park Plaza, London

Appointments and Leavers

Following a review by National Audit Office the auditors have criticised the use of the annual return, by some employers, to notify TP about new starters and leavers.

Notifications about appointments and withdrawals, which employers should submit throughout the year at the time the event occurs, are an essential supplement to the annual return and help to monitor teacher movement. To ensure the accuracy and continuity of records it is particularly important that employers submit appointment notifications and submit leaver returns prior to the submission of annual return data. It is clear from the number of teachers being added to the annual returns that some employers are not notifying us of appointments at the correct time. It is not necessary for details of teachers who appear on the leaver return to be included again on the annual return.

Notifications can be made either by completing the appropriate form, by disc (format available on web site), on TP Online or excel spreadsheet.

Paying-in slips

It has come to our attention that the paying-in slips, which accompany the monthly contributions, are not being completed correctly in respect of additional contributions.

Box G should be completed for existing teachers who are paying additional contributions for Family Benefits, Past Added Years or Contributions on a former higher salary.

Box I should be completed if you are collecting additional pension from teachers who have elected to purchase additional pension and are paying by instalments via their salary.

Added years and additional pension

CAY and PAY provisions no longer exist, however, existing elections will be honoured although they cannot be amended.

If members wish to increase their retirement benefits, they can do this by purchasing Additional Pension Benefits (APB).

Members will be able to buy up to £5000 of additional annual pension in multiples of £250. Employers can buy APBs with a lump sum; members can pay by a lump sum or by monthly salary deductions.

For more information, a fact sheet is available on the TP website, www.teacherspensions.co.uk.

A calculator is also provided on the TP website, which will give an indication of the cost.



Teaching and Learning Responsibility payments (TLR)

In the Winter '07 edition of TP News the new TLR range was published. The value of payment in respect of W09 under TLR1 was misprinted and should be £11,275.