

# New laws, important changes!

for Protocol National Visiting Lecturers

ProtocolNational  
Leaders in staffing for colleges

They affect **YOU** and they are happening **NOW!** Read on **carefully ...**



# Your checklist for action



**DON'T MISS OUT!** Recent changes in legislation mean that with immediate effect, we won't be able to offer you assignments in FE institutions unless you **ACT NOW!**

## Any questions?

Give our Visiting Lecturer Support Team a call on **TEL: 0115 911 1166** or contact one of our Staffing Co-ordinators listed on the back cover.



### SO WHAT DOES THIS RED BOX MEAN?

Information from each page is highlighted in these red boxes. Ensure you read these carefully.

### WHAT DO I NEED TO DO NOW?

Look out for the red boxes!

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REQUEST AN APPLICATION PACK BY COMPLETING THE REPLY SLIP

Protocol National is the UK's largest and most successful provider of staff to the FE sector. We have been working hard all year to open up more and more opportunities for our Visiting Lecturers. We now work with over 230 FE colleges.

**There has never been a better time to be with Protocol National!**

## Increase in Holiday Pay Allowance

Since 1998 all workers have had a statutory right to at least four weeks paid annual leave (that is, 20 days paid holiday if you work five days a week).

Although as a Protocol National Visiting Lecturer you are self-employed, you are classified as a 'worker' for these purposes and are entitled to paid annual leave. Like all those in the teaching profession, Visiting Lecturers are required to take their holiday outside contracted time. Protocol National pays accrued holiday pay at the end of assignments to coincide with the period of leave.

### CHANGES TO HOLIDAY RIGHTS

Although the legislation is still going through Parliament, it is now certain that the right to paid holidays will be increased to 28 days a year for someone working 5 or more days a week.

It is expected that the increase will be introduced in two phases:

- **From 1st October 2007, the minimum holiday entitlement for full-time workers increases to 4.8 weeks** (which is 24 days if you work a 5 day week).
- **From 1st April 2009 there will be a further increase in the minimum holiday entitlement for full-time workers to 5.6 weeks** (28 days if you work a five day week).

Holiday entitlement will be calculated on a pro-rata basis for part-time workers.

There will be no qualifying period for the additional entitlement.



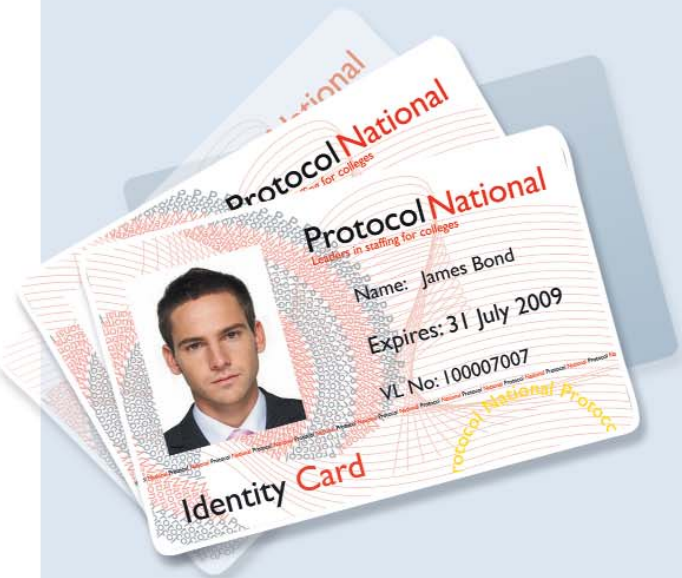
### SO WHAT DOES THIS MEAN TO ME?

With effect from 1st October 2007, your holiday pay allowance will be increased from 7.69% of your hourly pay to 9.23% of your hourly pay to reflect the increased statutory holiday entitlement. Payment will be made at the end of each assignment and will be shown as a separate item on your payslip.

### WHAT DO I NEED TO DO NOW?

You don't need to do anything – pay for your assignments will be adjusted automatically and the relevant details will appear on your payslips.

Protocol National is introducing **Identity Cards (ID Cards)** to its Visiting Lecturers with immediate effect. Here, we answer some of your questions.



### Why do I need an ID Card?

FE institutions are being subjected to the increasing demands of Government regulations and Protocol National is obliged to ensure that all aspects of its quality assurance systems are robust, up-to-date and fully compliant with changing sector requirements.

Protocol National is charged with helping colleges meet their obligations under the The Further Education (Providers of Education) (England) Regulations 2006, which came into force on 1st January 2007. This legislation was introduced as a result of the inquiry into the Soham tragedy and includes the following requirements:

- 1 that the identity of Visiting Lecturers is checked;**
- 2 that a check is carried out to establish whether the Visiting Lecturer is subject to any direction made under section 142 of the Education Act 2002 (this was previously called 'List 99');
- 3 that a check is carried out to ensure that the Visiting Lecturer meets all relevant qualification requirements;
- 4 that a check is carried out to confirm that the Visiting Lecturer has a right to work in the United Kingdom;
- 5 that an enhanced criminal record check is carried out in respect of the Visiting Lecturer or an enhanced criminal record certificate has been applied for and a children's suitability statement submitted by Protocol National in respect of the Visiting Lecturer.
- 6 that an enhanced criminal record check is undertaken for any Visiting Lecturer who has not had such a check carried out in the three months preceding their assignment start date. This means that an individual could require multiple CRB checks in a single year. (If you have been working in a job in an English school or FE institution that required an Enhanced Disclosure within three months of the start of a Protocol National assignment, a fresh application will not need to be made to the CRB).

FE institutions are under a separate legal obligation to confirm the identity of any lecturer, even if Protocol National has already carried out these checks.

We have therefore rewritten our systems, redesigned our vetting procedures and are in the process of introducing photo security identity cards for all Visiting Lecturers.

**WE WILL BE UNABLE TO OFFER YOU ANY FURTHER CONTRACTS UNTIL AN ID CARD HAS BEEN ISSUED**

# The Introduction of Protocol National ID Cards

## Is this the only ID Card I will need in college?

Protocol National Visiting Lecturers will need to carry their ID Card at all times. Some colleges may also require you to carry a college ID Card in addition to the Protocol National one.

## Do I have to pay for my Protocol National ID Card?

No, Visiting Lecturers are not being charged for ID Cards.

## Do ID Cards carry an expiry date?

Yes, all ID Cards will expire on 31st July 2008. They will be renewed automatically at no charge when you accept your first assignment in the following academic year.

## What do you need from me in order for an ID Card to be issued?

We need to take a photograph of you and we need to see some photo ID at the same time. This can be either your passport, a valid national identity card or your UK driving licence photocard. This can be done if you visit one of the colleges where our Staffing Co-ordinators are based (please see back cover for details).

Alternatively, if this is not convenient, you can send a passport size photograph to our Nottingham office. **However it must be accompanied by your passport, national identity card or your UK driving licence photocard (we cannot accept photocopies).** We will then issue your ID Card.

## What is the postal address of the Nottingham office?

Visiting Lecturer Support Team, Protocol National, Castle Marina Road, Nottingham NG7 1TN.

## What if I don't supply my passport / national identity card / UK driving licence photocard and a photograph?

If these items aren't supplied then we will be unable to offer you any contracts until an ID Card has been issued.

## What happens if I lose my ID Card?

If you lose your ID Card then Protocol National reserves the right to make a charge of £5.00 for a replacement.

## What if I don't supply my passport and a photograph?

If these items aren't supplied then we will be unable to offer you any contracts until an ID Card has been issued.

## I don't want to send my passport in the post because I'm going on holiday soon

We strongly recommend that any important documents like passports are posted to us by Royal Mail Recorded Delivery or Royal Mail Special Delivery. These services offer online tracking facilities and insurance.

We do not retain important documents – we return them within 24 hours of receipt and we always return them by Royal Mail Recorded Delivery or Royal Mail Special Delivery.

## I would still prefer to provide my passport in person

We have nearly 30 offices around the country where you are very welcome to make a personal visit. Simply telephone one of the Protocol National Staffing Co-ordinators listed on the back page of this booklet and make an appointment. You can take your passport or national identity card or UK driving licence photocard and have it copied to file while you wait.



### SO WHAT DOES THIS MEAN TO ME?

With immediate effect, for you to accept a contract for an assignment in an FE institution with Protocol National, we will need to issue you with an ID Card.

### WHAT DO I NEED TO DO NOW?

We need to see your passport or national identity card or UK driving licence photocard and we need a passport size photograph of you. Either visit one of our offices in person (see the back cover) or send one of these items plus a photograph, by Royal Mail Recorded Delivery or Royal Mail Special Delivery, to:

Visiting Lecturer Support Team, Protocol National, Castle Marina Road, Nottingham NG7 1TN

We have already seen on page 4 how FE institutions are being subjected to the increasing demands of Government regulations and how Protocol National is obliged to ensure that its systems are fully compliant with changing sector requirements.

Under The Further Education (Providers of Education) (England) Regulations 2006 (The '2006 Regulations'), FE colleges are now prohibited from accepting any worker supplied by an employment business such as Protocol National unless they receive written confirmation in advance that an array of checks has been carried out.

The items that Protocol National must confirm include that it has:

- Carried out a check to establish whether the Visiting Lecturer is subject to any direction made under section 142 of the Education Act 2002 (this list was previously called 'List 99').
- Obtained a valid enhanced criminal record disclosure certificate including a children's suitability statement in respect of a Visiting Lecturer OR ensured an enhanced criminal record certificate has been applied for and a children's suitability statement submitted by Protocol National in respect of the Visiting Lecturer.

To be 'valid' for the purposes of the 2006 Regulations, an Enhanced Disclosure must be less than 12 months old AND the Visiting Lecturer must have worked in either a school or FE college in England in a job that involved a 'relevant activity'<sup>1</sup> within three months of the start date of the new Protocol National assignment. (Please see the section entitled 'What if I hold an Enhanced Disclosure through another Registered Body?').

We refer to this as the 'Three Month Rule' and, depending on individual patterns of work, this means that you could require multiple CRB checks in a single year.

The 2006 Regulations, and in particular the Three Month Rule, have financial consequences for Visiting Lecturers in meeting the fees charged by the Criminal Records Bureau. Protocol National will also incur significant additional administrative costs in acting as a Countersignatory to Visiting Lecturers' CRB applications.

To mitigate the effect of the 2006 Regulations, Protocol National is changing its processes as follows for all new Visiting Lecturers and new assignments commencing on or after 1st September 2007.

<sup>1</sup> 'Relevant activity' is defined as regularly caring for, training, supervising or being solely in charge of persons aged under 18.



## WHAT WE NEED YOU TO DO NOW

Enclosed with this booklet you will find a CRB Disclosure Application Form. Complete, sign and date it and return it to us in the reply envelope provided, together with the documents requested in the Disclosure Application Checklist (also enclosed). **You should do this whether or not you have a valid Enhanced Disclosure at the moment. It is essential that we hold a completed application form on file at all times.**

Decide which of the following three payment options you prefer:  
**Send a cheque for £36 made payable to 'Protocol National Ltd'. Please leave the cheque undated as we will not cash it until you need a new Enhanced Disclosure (although please note that we will have to wait for your cheque to be cleared, and a delay in submitting your application could prejudice your chances of obtaining assignments).**

OR

**Pay by credit / debit card. The cost for this will be £36 + £2.50 card fee = £38.50. If you choose this option, we will ask you for your credit / debit card details at the time the application is submitted. Please note that the £2.50 card fee is charged by the credit / debit card providers and is passed to them in full by Protocol National. It does not benefit us.**

OR

**Agree that Protocol National can deduct the cost of each application for an Enhanced Disclosure from your first assignment fees earned immediately following the application.**

NB: we are able to deduct the CRB fee before tax and NI are deducted from your assignment fees, making this the most tax efficient method for you.

**If you would like to opt for this payment method, please confirm your agreement to this arrangement on the reply slip on the enclosed letter, sign it, detach and return to us.**

You don't need to worry about remembering to renew your Disclosures, we'll do that for you and we'll request any documents we need to place on file too.

## WHAT WE'LL DO AT PROTOCOL NATIONAL

We'll take care of your CRB checks and on your behalf we'll process all the Disclosure applications needed for you to undertake assignments with Protocol National.

We will securely store your Enhanced Disclosure application and we will scan copies of your supporting documents and store them securely too. We will return your original documents to you within 24 hours of receipt, by Royal Mail Recorded Delivery or Royal Mail Special Delivery.

If you accept an assignment with us and you do not meet the 'Three Month Rule', ie it has been over three months since you last undertook a 'relevant activity' which required an Enhanced Disclosure in an English school or FE institution, then we will forward your stored application for a new Enhanced Disclosure to the CRB. Before submitting it, we will check with you that none of your essential details have changed, for example your address, and we will review your supporting documents to ensure they are still valid. At this point, if you have opted to pay by:

**cheque, then we will date and bank it.**

OR

**credit / debit card, we will ask you for your card details and process the charge of £38.50.**

**If you have opted to have the CRB fee deducted from your gross assignment fees then this will be noted on the first payslip you receive after commencing the assignment.** (If your earnings in the first pay period following the application are insufficient to cover the full CRB fee, deductions will be made from subsequent earnings until the full fee has been recouped.)

We will repeat this process each time we need to make a subsequent Disclosure check.

# Changes to CRB requirements in Further Education

## Our new procedure for CRB Disclosure applications for Protocol National Visiting Lecturers

Our college partners need us to meet their requirements and fill the assignments they give us promptly and efficiently. In order to offer them an acceptable level of service and make sure they continue to work with us - so we can offer you as many opportunities as possible - we need to ensure Disclosure applications can be undertaken promptly. Therefore we have introduced a new procedure, whereby we will:

- Manage the timing of your renewals to ensure that you have a valid check either in place or being applied for, before you commence an assignment with Protocol National.
- Facilitate portability if you already hold an Enhanced Disclosure with another Registered Body.
- Facilitate portability of the Enhanced Disclosure you obtained through Protocol National, should you also wish to undertake work with another Registered Body.
- No longer require you to have an Enhanced Disclosure upon joining our database. We will only apply for the Disclosure on your behalf when you have accepted a contract with us.

## I am a new Visiting Lecturer. When do I pay for my first CRB check?

The cost of your initial (and any subsequent) CRB check is currently £36. This is the fee charged by the Criminal Records Bureau and they may increase it from time to time. We will not take this payment from you (by one of the three payment options we mentioned earlier) until you have accepted an assignment with us and the Disclosure application has been made.

## What if I hold an Enhanced Disclosure through another Registered Body?

Portability can be facilitated with another Registered Body (for example, a college) providing that:

- The Registered Body confirms the details of your Disclosure with Protocol National.
- The Disclosure has been issued in the last 12 months.
- You have worked for that Registered Body within the last 3 months.
- Protection of Children Act List Information (POCA) and Protection of Vulnerable Adults List Information (POVA) checks have been requested and carried out.

For portability to be facilitated, you need to complete a CRB Disclosure Consent Form (available to download from [www.protocol-national.co.uk](http://www.protocol-national.co.uk)). You must submit the completed consent form, together with your Enhanced Disclosure, to the Visiting Lecturer Support Team, Protocol National, Castle Marina Road, Nottingham NG7 1TN.

## Will I need a new CRB check after the summer holidays?

If you are starting an assignment in September, it will be necessary for us to apply for a CRB check on your behalf **as soon as possible**, if you have had a break of three months or more from the time when you were last undertaking a 'relevant activity' which required an Enhanced Disclosure in an English school or FE institution.

## I want to join the Protocol National database. Can I ask the college which used to employ me to confirm I've worked there in the past 3 months? Does this mean I won't need a new Enhanced Disclosure?

You will not require a new Enhanced Disclosure because we will facilitate portability with the Registered Body noted on your existing Disclosure, providing it is less than 12 months old and you start your first assignment for Protocol National within three months of leaving the college. For portability to proceed, you will need to complete a CRB Disclosure Consent Form (available to download from [www.protocol-national.co.uk](http://www.protocol-national.co.uk)).

Acceptable proof of your having undertaken a 'relevant activity' within the previous three months (if the activity was not an assignment on behalf of Protocol National) is a statement on an English school's or FE institution's letterhead, signed by an employee of the institution, confirming your work period, end date and that you were undertaking a 'relevant activity'. We will hold the letter on file. Please note that a payslip is not acceptable proof.

If your Disclosure is more than 12 months old or you do not get offered an assignment by Protocol National that begins within three months of your last working day at your old college, then it will be necessary to apply for a new one, in which case you will be required to pay the £36 fee (either by cheque, debit / credit card or by agreeing to us deducting this amount from your gross assignment fees, as detailed above).

## I've previously sent all my documents to your Nottingham office, do I have to send them all in again?

Not necessarily. Certain documents could still be valid (for example your driving licence and passport). We can use them again if we have scanned them onto our system and they are in valid date. It may be necessary to submit a fresh address document, such as a utility bill or bank statement.

## How long will you keep my original documents for?

We do not retain your documents – we return them within 24 hours of receipt and we always return them by Royal Mail Recorded Delivery or Royal Mail Special Delivery.

## I don't teach children or vulnerable adults so why do I need an Enhanced Disclosure?

Whilst you may not be teaching children or vulnerable adults directly, most colleges now have a number of courses running, for example, for 14 to 16 year olds. It is possible you will have contact with them in shared public spaces such as cafeterias and toilet facilities. It has always been our practice to carry out the same checks in relation to all our Visiting Lecturers, regardless of the work that they do, and we and our college clients consider this to be appropriate best practice going forward.

## GLOSSARY OF TERMS

### CHILDREN

The Criminal Justice Court Service Act (CJCSA) defines a child as someone who is under 18 (under 16 if the child is employed).

### DISCLOSURE FEE

This is the cost of a CRB check, fixed by the CRB and currently £36.

### PORTABILITY

Portability refers to the re-use of a CRB Disclosure, obtained by one Registered Body and later used by another Registered Body.

### REGISTERED BODIES

Registered Bodies are organisations like Protocol National or FE colleges, which have registered directly with the CRB to use its services.

### RELEVANT ACTIVITY

A relevant activity means regularly caring for, training, supervising or being solely in charge of persons aged under 18.

### THREE MONTH RULE

It is mandatory for a new enhanced criminal record check to be carried out for any Visiting Lecturer who has not had such a check carried out in the three months preceding the start date of an assignment at an FE institution. However where the Visiting Lecturer has worked in either a school in England in a position which brought him regularly into contact with persons aged under 18, or another FE institution in England in a position which involved the provision of education and a relevant activity, during the period which ended not more than three months before the start date of an assignment at an FE institution, it is acceptable for the enhanced criminal record check to have been carried out more than three months but less than 12 months before the date that the Visiting Lecturer is due to begin work at the institution.

### VULNERABLE ADULTS

A vulnerable adult for the purposes of an Enhanced Disclosure is a person aged 18 or over who receives services in consequence of a condition and has a recognised disability.

### WHERE CAN I GET MORE INFORMATION ABOUT THE LEGISLATION YOU MENTION?

Go to [www.opsi.gov.uk/si/si2006/20063199.htm](http://www.opsi.gov.uk/si/si2006/20063199.htm) to access details of Statutory Instrument 2006 No. 3199 The Further Education (Providers of Education) (England) Regulations 2006. You can also purchase a copy from The Stationery Office Limited via this website, price £3.00.

## Changes to CRB requirements in Further Education continued

### I have been living abroad for the past two years, what should I do?

If you have been out of the country for more than 12 months, we will require you to obtain a letter from the embassy or police force of the country in which you were residing, confirming that they are not aware of any offences being committed by you whilst you were resident. This applies irrespective of your nationality.

### Is an Enhanced Disclosure optional?

No, having a valid Enhanced Disclosure is a mandatory requirement if you wish to accept an assignment in an FE institution through Protocol National.

### I don't want to send you an undated cheque.

We offer a further two alternative payment methods if you do not wish to pay by cheque; please see page 6.

### If Protocol National deducts the cost of each CRB Disclosure application from my gross assignment fees, why is this more tax efficient for me?

Because you are self-employed, you can claim the cost of your CRB applications as a business expense on your annual self assessment tax return. You are required to submit this to HMRC in the September following the end of the tax year for which you are completing your claim. This means you are unlikely to receive repayment of the tax paid on this amount of money until at least the end of January the following year, a gap of many months from the end of the tax year for which you are claiming the relief. Alternatively, if Protocol National deducts the cost of your CRB application(s) from your gross assignment fees before tax and National Insurance, this is a more administratively efficient route for you and it ensures that you obtain the credit for this expense at the time it is incurred.

### What happens if I refuse to participate in one of the three payment options for CRB Disclosure applications?

To accept a contract with Protocol National, you must either hold a valid Enhanced Disclosure or be applying for one. Colleges need us to

meet their requirements and fill the assignments they give us promptly and efficiently. In order to offer an acceptable level of service to our FE clients and fulfil the legislative obligations placed upon us, we have to process and administer the CRB applications for our Visiting Lecturers. If you do not select one of our payment options then unfortunately we will not be able to offer you any work.

### Why will I need more than one CRB check in a year?

It will only be necessary for us to apply for two (or more) CRB checks on your behalf within one year when you have a break of three months or more from the time when you were last undertaking a 'relevant activity' which required an Enhanced Disclosure in an English school or FE institution, and the start date of a new assignment.

### Will I be sent a CRB certificate every time a new one is issued?

Yes, a copy of every Enhanced Disclosure certificate issued will be sent to you by the CRB.

### None of the staff at a local college are re-applying for their Disclosures. Why am I affected?

Employees of the college are subject to the same requirements of the 2006 Regulations. Permanent members of college staff will not have to apply for new Enhanced Disclosures so frequently, but if a college has staff who are, for example, contracted for fixed terms then the Three Month Rule applies to them to.

### WHAT DO I NEED TO DO NOW?

It is essential that we hold a completed CRB application form on file at all times. Irrespective of your present situation with regard to assignments, and whether or not you have a valid Enhanced Disclosure right now, please:

- complete the enclosed CRB Disclosure Application Form
- refer to the enclosed Disclosure Application Checklist and gather the appropriate combination of original documents from Groups 1 and 2
- select your preferred payment method (see page 6), and either: visit one of our offices in person (see the back cover), or post your completed application and documents by Royal Mail Recorded Delivery or Royal Mail Special Delivery in the reply envelope provided to: Protocol National, Castle Marina Road, Nottingham NG7 1TN.



Professional Indemnity Insurance (PII) is designed to protect professionals against errors and eventualities that cannot be foreseen, however careful they might be.

In an education setting, it offers protection in today's litigious climate against claims made by dissatisfied learners and institutions, where they have suffered financial loss as a result of neglect, errors and omissions. As a teaching professional, you are in the business of 'selling' your knowledge or skills. Professional Indemnity Insurance is probably the most important cover for a self-employed teaching professional and is mandatory for Protocol National Visiting Lecturers.

**Every Protocol National Visiting Lecturer must have PII cover. You have a choice whether to arrange this independently through an insurance broker or to buy cover under the policy maintained by Protocol National.**

### What are the benefits offered by the Protocol National policy?

- Cover of £2 million for any one claim, generally considered to be more than adequate for professional teaching requirements. Since 2005, we have doubled the level of cover offered
- No excess on claims
- No need to complete a lengthy proposal document – you are covered as soon as you accept a Protocol National assignment
- Direct access to specialist claims staff
- Access to specialist lawyers should you need to defend a claim
- No interest on your payments
- You only pay for cover in the months you actually work
- A continuous policy which eliminates the need to undertake a time consuming renewal each year
- A policy tailored to the teaching profession so you are covered for the risks we know you are most likely to face
- Free access to a commercial and legal helpline with advice on contract, employment and business matters

One important aspect when considering professional indemnity insurance is that, because there can often be a long delay between an event and a subsequent claim, you need to be covered both at the time of the event and when the claim is made.

With Protocol National's policy, you are covered for as long as you remain on our database, even when you are not delivering an assignment. If you have your own policy and you have a break in work or you decide to retire, you would still need to arrange cover for gaps in employment and 'run off' cover for a period of time afterwards.

# Professional Indemnity Insurance (PII)

### What does the Protocol National policy cover?

†Cover includes:

- Libel and Slander
- Loss of documents
- Negligence or breach of a duty of care
- Infringement of intellectual property rights
- Fidelity
- Unintentional breach of confidence

†Copies of the policy are available on request.

Remember it is always helpful if you notify Protocol National immediately you become aware of any claim or circumstances which could give rise to a claim.

### What will this extensive cover cost me?

Protocol National offers a **very competitive rate for its Professional Indemnity Insurance** cover. Despite the rise in insurance premiums, our rates have been unchanged for two years **and** during the same period we have doubled the level of cover offered. Nevertheless we must now notify you of our change in rates.

Visiting Lecturers who have delivered an assignment during the preceding month will be deducted 2.85% of their total gross assignment fees for that month. The minimum monthly payment threshold of £3.25 has been removed. The amount paid by any individual will be subject to an upper limit of £25.00 per month. This change will be effective for all assignments starting from 1st September 2007.

#### SO WHAT DOES THIS MEAN TO ME?

From 1st September 2007, the new rate for Professional Indemnity Insurance through Protocol National will be 2.85% of total gross assignment fees per month.

The minimum monthly payment threshold of £3.25 has been removed. The amount paid by any individual will be capped at an upper limit of £25.00 per month.

#### WHAT DO I NEED TO DO NOW?

You don't need to do anything – cover is automatic when you are delivering a contracted assignment.

Should you wish to opt out of this insurance cover, you must send a copy of your personal Professional Indemnity Insurance policy document to Visiting Lecturer Support Team, Protocol National, Castle Marina Road, Nottingham NG7 1TN, otherwise you will not be able to continue to be considered for assignments with Protocol National.

Since 1996 it has been a legal requirement for employers to check that their employees are legally entitled to work in the UK. Even though Protocol National Visiting Lecturers are not employees, we began carrying out checks in 2004 in response to college requirements.

The new Further Education (Providers of Education) (England) Regulations 2006 now mean that a college cannot permit a Visiting Lecturer to start work on their premises unless Protocol National confirms (amongst other things) that they are legally entitled to work in the UK.

**Why am I being asked about my right to work? I have lived and worked in the UK all my life. Surely this only applies to foreign nationals?**

The law regarding checks applies equally to everyone. Regardless of whether you were born in the UK or have worked in the UK all your life, you nevertheless have to provide evidence of your right to work.

**What evidence is acceptable proof of my right to work in the UK?**

Here are two lists of acceptable documentation which support the right to work in the UK. Please note that we can only accept original documents. If a passport is supplied, the photo likeness must be clear and recognisable.

If you are unable to supply any documentation from 'List 1', then 'List 2' covers an alternative combination of documents that will also satisfy right to work requirements.

## Right to Work 'List 1' Documents

- 1 A passport showing that the holder is a British citizen, or has a right of abode in the United Kingdom;  
**OR**
- 2 A document showing that the holder is a national of a European Economic Area country or Switzerland. This must be a national passport or national identity card;  
**OR**
- 3 A residence permit issued by the Home Office to a national from a European Economic Area country or Switzerland;  
**OR**
- 4 A passport or other document issued by the Home Office which has an endorsement stating that the holder has a current right of residence in the United Kingdom as the family member of a national from a European Economic Area country or Switzerland who is resident in the United Kingdom;  
**OR**
- 5 A passport or other travel document endorsed to show that the holder can stay indefinitely in the United Kingdom, or has no time limit on their stay;  
**OR**
- 6 A passport or other travel document endorsed to show that the holder can stay in the United Kingdom; and that this endorsement allows the holder to do the type of work you are offering if they do not have a work permit;  
**OR**
- 7 An Application Registration Card issued by the Home Office to an asylum seeker stating that the holder is permitted to take employment.

## Right to Work 'List 2' Documents

### FIRST COMBINATION

**A DOCUMENT SHOWING YOUR PERMANENT NATIONAL INSURANCE NUMBER AND NAME, EG P45, NATIONAL INSURANCE CARD OR A LETTER FROM A GOVERNMENT AGENCY (PLEASE NOTE THIS CANNOT BE A DOCUMENT ISSUED BY PROTOCOL NATIONAL);**

**AND**

**ONE OF THE FOLLOWING:**

- 1 A full birth certificate issued in the United Kingdom, which includes the names of the holder's parents;  
**OR**
- 2 A birth certificate issued in the Channel Islands, the Isle of Man or Ireland;  
**OR**
- 3 A certificate of registration or naturalisation stating that the holder is a British citizen;  
**OR**
- 4 A letter issued by the Home Office to the holder which indicates that the person named in it can stay indefinitely in the United Kingdom, or has no time limit on their stay;  
**OR**
- 5 An Immigration Status Document issued by the Home Office to the holder with an endorsement indicating that the person named in it can stay indefinitely in the United Kingdom, or has no time limit on their stay;  
**OR**
- 6 A letter issued by the Home Office to the holder which indicates that the person named in it can stay in the United Kingdom, and this allows them to do the type of work you are offering;  
**OR**
- 7 An Immigration Status Document issued by the Home Office to the holder with an endorsement indicating that the person named in it can stay in the United Kingdom, and this allows them to do the type of work being offered.

### SECOND COMBINATION

**A WORK PERMIT OR OTHER APPROVAL TO TAKE EMPLOYMENT THAT HAS BEEN ISSUED BY WORK PERMITS UK;**

**AND**

**ONE OF THE FOLLOWING:**

- 1 A passport or other travel document endorsed to show that the holder is able to stay in the United Kingdom and can take the work permit employment in question;  
**OR**
- 2 A letter issued by the Home Office to the holder confirming that the person named in it is able to stay in the United Kingdom and can take the work permit employment in question.

**NB: YOU WILL NOT SATISFY YOUR RIGHT TO WORK IN THE UK IF YOU PRODUCE ONE DOCUMENT FROM THE FIRST COMBINATION AND ONE FROM THE SECOND COMBINATION.**



# Right to work in the UK

## My passport has expired

Providing you are a British national, an EEA national, a Swiss national or your passport has been endorsed to show that you have indefinite leave to remain in the UK, an expired passport is acceptable proof of the right to work in the UK.

## I have a birth certificate and a National Insurance document, but my name is different on each one. What should I do?

If your birth certificate carries your maiden name or another different surname, you will also need to provide either a marriage certificate or a deed poll document as proof of change of name.

## I have previously supplied you with my documentation, why are you asking me for it again?

Protocol National only began doing specific checks on the right to work in the UK in May 2004. If you joined the Protocol National database prior to 1st May 2004, it was unlikely that your documentation was scanned and stored by Protocol National.

If you have submitted documents since 1st May 2004, we may still request evidence of your right to work, for example because:

- Whilst we may have received, checked and recorded that you have documentary evidence supporting your right to work, records may have been deleted in accordance with our data protection policy which means that we do not hold documents longer than strictly necessary. The changes in legislation now mean that we need to hold this information about you for as long as you would like to be considered for assignments and for a period thereafter.
- We may have reviewed our records and found that, whilst we possess witnessed documentation for you, unfortunately the photo ID is not very clear because the technology used at the time was not to the standard it is now. As we have previously seen your original document, it is acceptable for you to send in a photocopy of that document, providing the image is clear.

## What if I refuse to supply evidence?

If an individual refuses to supply appropriate right to work documentation when asked, they will be unable to work, will not be offered any contracts by Protocol National and will be removed from the Protocol National database with immediate effect.

## I'm not sending these documents to you

As previously stated, if you refuse to show us these documents, we will not be able to contract you. However there are alternatives to sending the documents – we can see them in person instead (see below).

## I am not comfortable with the thought of sending my passport in the post

We strongly recommend that any documents posted to us are sent by Royal Mail Recorded Delivery or Royal Mail Special Delivery. These services offer online tracking facilities and insurance.

We do not retain your documents – we return them within 24 hours of receipt and we always return them by Royal Mail Recorded Delivery or Royal Mail Special Delivery.

## I would still prefer to provide my documents in person

We have nearly 30 offices around the country where you are very welcome to make a personal visit. Simply telephone one of the Protocol National Staffing Co-ordinators listed on the back cover of this booklet and make an appointment. You can take your documentation and have it copied to file while you wait.



### WHAT DO I NEED TO DO NOW?

Gather the appropriate documentary evidence from

'List 1' or 'List 2' and either:

visit one of our offices in person (see the back cover),

or

send the documents by Royal Mail Recorded Delivery or Royal Mail Special Delivery to: Visiting Lecturer Support Team, Protocol National, Castle Marina Road, Nottingham NG7 1TN.

Qualified Teacher Learning and Skills (QTLS) indicates that a teacher working in the lifelong learning sector has had their professional standing confirmed by the Institute for Learning (IfL) and is licensed to practise.

This can be achieved by either:

**GAINING RECOGNITION FOR AN EXISTING TEACHING QUALIFICATION, OR  
UNDERTAKING A NEW TEACHING QUALIFICATION AND PROVIDING EVIDENCE OF CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD).**

#### What is happening from September 2007 onwards?

The White Paper 'Further Education: Raising Skills, Improving Life Chances' sets out the Government's commitment to have a well qualified and professional workforce across all FE institutions. Major reforms come into force on 1st September 2007, including:

- New Initial Teacher Training (ITT) pathways and qualifications leading to:
  - Associate Teacher, Learning and Skills (ATLS) status, and
  - Qualified Teacher, Learning and Skills (QTLS) status (including specialist routes for Skills for Life).
- A requirement for all teachers, tutors, trainers and lecturers to fulfil at least 30 hours of continuing professional development (CPD) each year. This will apply pro rata for part-time workers, with a minimum requirement of 6 hours irrespective of the total number of hours taught during the year.
- A requirement for all teachers, trainers, tutors and lecturers to be registered with the Institute for Learning (IfL).

#### Changes to the Teacher Training Qualification Framework

##### Why have there been changes to the qualification framework?

In order to deliver a qualified workforce by 2010 as outlined in the DfES 'Success for All' targets, a series of reforms will begin on 1st September 2007 which will impact on all new teachers, tutors, trainers and lecturers within the FE sector.

##### What are the reforms which will begin on 1st September 2007? There are two strands to the reforms, defined through two pieces of Regulation:

- Revised teaching qualifications for new teachers, including the introduction of 'Licensed Practitioner' status and a differentiation between Full and Associate teacher roles.
- Remaining in good standing as a teaching professional, including mandatory CPD requirements for all teachers (new and existing).

##### What are the new teaching qualifications?

The new awards are PTLLS, CTLLS and DTLLS. They are progressive, unitised qualifications, with credits awarded for each unit undertaken.

#### Preparing to Teach in the Lifelong Learning Sector (PTLLS)

It is a mandatory requirement that all new entrants to teaching in the learning and skills sector (full-time and part-time) will have to complete this level 3 award before they can practise in an unsupported manner. PTLLS is designed to support those embarking on teaching, training, tutoring or lecturing careers within the learning and skills sector and will form the early part of the Initial Teacher Training programme.

It must be completed within two years of initial employment, during which time teachers may only be employed in an Associate Teacher role and must be provided with 'appropriate support' and must not have sole responsibility for a group of learners.

'Appropriate support' could include, for example, working from existing lesson plans, schemes of work, pre-prepared materials, workbooks and so on, in conjunction with other members of the teaching team.



The award can either stand alone or be embedded within a larger module and will comprise:

- A minimum of 30 taught hours
- An additional 30 hours of self directed study
- The identification of skills gaps in literacy, language, numeracy and e-skills and the creation of a professional development plan.

For individuals from industry re-training in order to teach in FE, appropriate vocational-style PTLLS awards are under development and are expected to be available soon.

Following achievement of a PTLLS award, teachers will then progress to either the CTLLS (for those in an Associate Teacher role) or the DTLLS (for those undertaking a Full Teacher role).

#### Certificate in Teaching in the Lifelong Learning Sector (CTLLS)

The Certificate in Teaching in the Lifelong Learning Sector requires the completion of a minimum of 24 credits offered at levels 3 or 4 and is appropriate for those wishing to undertake an Associate Teacher role.

#### Diploma in Teaching in the Lifelong Learning Sector (DTLLS)

The Diploma in Teaching in the Lifelong Learning Sector requires the achievement of a minimum of 120 credits offered at a minimum of level 5 and is appropriate for those wishing to fulfil a Full Teacher role.

### What is 'Licensed Practitioner' status?

As outlined in 'Success for All', it is intended that by 2010 all existing teachers without a recognised teaching qualification will become qualified by either:

- gaining recognition for an existing qualification, or
- undertaking a new qualification and consequently becoming Licensed Practitioners.

There will be two categories of Licensed Practitioner, corresponding to the two teaching roles:

- Associate Teacher, Learning and Skills (ATLS) - Associate Teacher role
- Qualified Teacher, Learning and Skills (QTLS) - Full Teacher role

Those completing either of these teaching qualifications will be regarded as Qualified Teachers. However they will not be Licensed Practitioners until they have successfully completed the additional requirement of 'Professional Formation' (see information to the right).

It is not a requirement for qualified teachers currently within the sector to become Licensed Practitioners. However, it is the intention of the Government that this should be the benchmark for the learning and skills sector and therefore that existing teachers will opt to become licensed. LLUK is in the process of setting up a national recognition process for existing teachers and a tariff of legacy qualifications is being compiled.

### What is the difference between an Associate Teacher and Full Teacher role?

#### FULL TEACHER ROLE

Someone who teaches fully and unsupported in all areas of teaching including curriculum design and development, assessment and delivery. This applies irrespective of whether the post is full-time or part-time, across one or more subject areas.

#### ASSOCIATE TEACHER ROLE

Someone who is supported in their teaching role. This applies irrespective of whether the post is full-time or part-time, across one or more subject areas. By the nature of their assignment-based activity, Protocol National Visiting Lecturers will fulfil the role of Associate Teacher.

More detailed definitions of these roles are expected to be released soon.

### What is 'Professional Formation'?

The status 'Licensed Practitioner' will be conferred by the IfL (Institute for Learning) upon the successful completion of 'Professional Formation'. This process of workplace assessment is not expected to be time-related, rather it will be based upon evaluation and referral. The process to become a Licensed Practitioner will be confirmed by IfL once the regulations are in place. A practitioner's licence will be renewable annually, will include a CPD obligation, and could be withdrawn or suspended by IfL pending the outcome of an investigation of alleged misconduct.

# Qualified Teacher Learning and Skills (QTLS)

### How do the changes affect Skills for Life teachers?

The new professional standards for teachers, trainers, tutors and lecturers in the learning and skills sector apply to Skills for Life teachers (those teaching literacy, numeracy and ESOL) too. Skills for Life teaching is seen as a full teaching role and all new entrants to the profession will therefore have to gain a Diploma in Teaching in the Lifelong Learning Sector (DTLLS), in addition to a subject specific qualification at a minimum of level 3. These can be achieved separately or by an integrated approach.

Teachers following this Skills for Life route of teacher training will not just be confined to teaching Skills for Life and could subsequently move into teaching other subjects if they have the appropriate subject expertise.

### I am a Learning Support Assistant. Am I affected by these changes?

Learning Support Assistants are not affected by these changes and you do not have to register with the IfL. However you may wish to note that during 2007/08, LLUK will be looking at a new framework of qualifications for Learning Support Assistants and specialist Learning Support Assistants (those supporting literacy, numeracy and ESOL). Dissemination events will start in February 2008 - we will keep you informed of developments.



## WHAT DO I NEED TO

**DO NOW?** If you are a qualified teacher already working in FE, you need to register with the Institute for Learning: Visit [www.ifl.ac.uk](http://www.ifl.ac.uk) and download an application form, or Tel: 0207 190 1690, or Email: [enquiries@ifl.ac.uk](mailto:enquiries@ifl.ac.uk)

If you are already teaching in FE, without a recognised teaching qualification however you are working towards one, you will need to complete the qualification you are enrolled on and register with the Institute for Learning.

If you are already teaching in FE, but without a recognised teaching qualification and you are NOT yet working towards one, you must embark on a teaching qualification. In the first instance, contact local providers to check out the availability of the PTLTS award. You will also need to register with the Institute for Learning.

If you are new to the sector, want to start teaching in FE and don't have a recognised teaching qualification, you must enrol on a teacher training programme, for example you could contact local providers to find out about the PTLTS award and then you will need to register with the Institute for Learning.

From September 2007, following direction from the Government, changes are being introduced to the ways that colleges and teachers manage, record and monitor Continuous Professional Development (CPD). These can be summarised as follows:

**Teachers must maintain their own CPD**

**AND**

**Teachers must be registered with the Institute for Learning by 31st March 2008**

These changes affect Visiting Lecturers because FE institutions are under an obligation to ensure that all teaching delivered in their establishment meets the required quality standards.

### What is Continuous Professional Development (CPD)?

CPD is a process used across a number of professions, from dentists to accountants, from lawyers to financial advisers. It is a continuous process of personal growth, to improve the capability and realise the full potential of professional people at work. This can be achieved by obtaining and developing a wide range of knowledge, skills and experience, which may not be acquired during initial training or routine work and which together develop and maintain competence to practise. It is owned by the individual, but should take account of organisational (college) needs.

### What is a 'teacher'?

In the context of CPD we have used the term 'teacher' to encompass the roles of lecturer, teacher, tutor and trainer. It is these roles to which the new requirements for CPD apply. Learning support assistants are not affected by the new requirements, nor are assessors.

### Who has the responsibility to provide evidence for CPD?

As with any other profession, you are ultimately responsible for planning and evaluating your own CPD.

### Why should I undertake CPD?

There are a number of reasons to consider:

- 1 It is a Government requirement for all new and existing teachers to demonstrate evidence of post qualification continuous professional development.
- 2 By developing your professional knowledge and skills you will enhance your credibility with learners.
- 3 If you demonstrate your professional standing in the sector you will be increasing your chances of work.
- 4 You will be able to add value to the learning experience you are providing to your students.
- 5 It is possible to create a more satisfying lifestyle by growing and developing your expertise.
- 6 FE institutions will require evidence that Visiting Lecturers are fulfilling their CPD obligations and increasingly will not accept them to work in their establishments if they do not.

### What types of activities can be considered as being CPD?

The range of activities and experiences which contributes to a teacher's development is very wide and includes those which have progressed existing skills or those enhancing professionalism. The types of activities will also be shaped by your status as a Visiting Lecturer, however there are still numerous ways to obtain CPD, for example:

- Obtaining additional relevant qualifications
- Attending update courses
- Self evaluation and reflection

You should refer to the Institute for Learning ([www.ifl.ac.uk](http://www.ifl.ac.uk)) for full information and advice.

**For Protocol National's new professional development seminars for teachers, please see page 16**

### How much CPD do I need to undertake annually?

From September 2007, all teachers will be required to:

- undertake 30 hours of CPD in each academic year, **pro rata for part-time workers**, with a minimum requirement of 6 hours irrespective of the total number of hours taught during the year.
- maintain a record of the CPD they have undertaken in each academic year and make it available to the Institute for Learning and to each of the colleges where they are contracted to work, for inspection.



# Continuous Professional Development (CPD)

## What is the Institute for Learning (IfL)?

The Institute for Learning (IfL) ([www.ifl.ac.uk](http://www.ifl.ac.uk)) is the professional body for teachers, trainers and student teachers in the learning and skills sector. By supporting the professional needs of its members, it strives to raise the status of teachers working across the whole sector, including Further Education, adult and community education and work-based learning.

The Institute for Learning has been named by the Government as a key partner to help deliver change in the sector. The DfES reform proposal document entitled 'Equipping our Teachers for the Future' names the IfL as the body which will award the 'Licence to Practise' as Qualified Teacher Learning and Skills to all new teachers entering the sector from 2007.

Raising the status of post-16 education and training is linked with meeting recognised standards of practice. The Government has laid out plans for reforming the learning and skills sector, but individual teachers have the power to shape change for themselves by joining the IfL. As a body run by and for teaching professionals, it consults with its members on how to influence key sector developments; teachers can therefore take control of how their professional needs are met and evidence their professionalism.

## How much will it cost me to join the Institute for Learning?

The Institute for Learning has several grades of membership:

IfL Membership Grades	COST
FELLOW	£25
MEMBER	£20
ASSOCIATE	£15
ASSOCIATE (FULL-TIME STUDENT)	£10
NON REFUNDABLE APPLICATION FEE	£5

The annual membership year runs from 1st April to 31st March.

## Do I have to meet this membership cost myself?

In response to the support received from FE for the Government to introduce the CPD requirements, the Minister of State for Lifelong Learning Further and Higher Education responded as follows:

*".....there has been widespread support in FE for us to introduce requirements for teachers to undertake continuing professional development and become professionally registered with the Institute for Learning. I am, therefore, pleased to announce today that this Government will meet the full costs of the professional registration with the IfL. Such an investment supports our aim of professionalising the FE workforce, while registration will ensure that teachers are qualified and complete at least 30 hours of continuing professional development per year."*

Bill Rammell MP  
1st June 2007

The IfL is working to develop a methodology to support this initiative. In advance of that, the IfL has announced that it will suspend membership subscription fees for applications received on or after 12th June 2007 until the situation becomes clear. The initial £5 non refundable application fee will still be required in order to process an application. For existing members with fees due on or after 12th June 2007, renewals will also be suspended. Once the outcome of these ongoing discussions is clear, the IfL will contact all members detailing the effect upon their subscriptions and any monies owing.



## SO WHAT DOES THIS MEAN TO ME?

It will be compulsory for all new and existing teachers to register with the Institute for Learning (IfL) for the purposes of recording, evaluation and monitoring their CPD:

- For existing teachers this must happen by 31st March 2008.
- For teachers appointed after 1st September 2007, registration must take place within 6 months of appointment.
- All teachers must maintain their registration continuously thereafter in order to remain within the workforce of the learning and skills sector.

## WHAT DO I NEED TO DO NOW?

If you are not already registered with the Institute for Learning, visit [www.ifl.ac.uk](http://www.ifl.ac.uk) and download an application form. If you have a membership query, tel: 0207 190 1690 or email: [enquiries@ifl.ac.uk](mailto:enquiries@ifl.ac.uk)

The Institute for Learning, Suite 1.5, Bracton House,  
34-36 High Holborn, London WC1V 6AE

# New professional development seminars **for teachers**

## Want to become a grade one teacher?

From October, Protocol National's Observe service will be running a series of professional development seminars for teachers. These will be held at our conference suite at Castle Marina in Nottingham.

**There will be lots of tips on how to become a grade one teacher. Each seminar will focus on helping teachers to raise standards and offer learners an outstanding learning experience.**

There are specific subject days where you can share ideas with other specialist teachers; valuable seminars providing guidance and support on behavioural management; suggestions on how to successfully incorporate Skills for Life into lessons; and advice on how to make a real difference to learners.



This includes support with differentiation by Jackie Rossa, whose college recently achieved grade ones in all areas.

Whatever your interest, we are confident you will leave Nottingham brimming with excitement and buzzing with ideas!

**Delegates will receive an attendance certificate as evidence of CPD.**

### **WHAT DO I NEED TO DO NOW?**

For full details of Protocol National's seminars and to make a booking: visit [www.protocol-national.co.uk/observe](http://www.protocol-national.co.uk/observe) or phone Lauren Gage on tel: 0115 911 1227

## The **VL Zone**

As a Protocol National Visiting Lecturer you have access to your very own zone on the Protocol National website. Every day, Protocol National generates hundreds of new opportunities for Visiting Lecturers. When a college asks us to fill a new assignment, they want it filled ... FAST!

**Use the VL Zone to ensure we have your correct details so that we can contact you quickly with relevant assignment opportunities.**

On the VL Zone, you can:

- ACCESS AND CHANGE YOUR PERSONAL INFORMATION
- UPDATE YOUR AVAILABILITY
- LOOK AT YOUR ASSIGNMENT AND PAY DETAILS
- ASK QUESTIONS AND PROVIDE FEEDBACK ON OUR SERVICE VIA ONLINE REQUEST FORMS

### **WHAT DO I NEED TO DO NOW?**

If you haven't already done so, go to: [www.protocol-national.co.uk/vlzone](http://www.protocol-national.co.uk/vlzone) and follow the few simple steps to register for online access.

**EXCLUSIVE  
OFFER**

## for Visiting Lecturers from Specsavers Opticians

### A new benefit from Protocol National

**One of the advantages of being a Protocol National Visiting Lecturer is our ability to negotiate and make available to you supplier discounts and other favourable terms with national companies.**

We have recently negotiated a special offer with Specsavers Opticians for Visiting Lecturers registered on our database. As a Protocol National Visiting Lecturer, you get automatic membership of the Specsavers Premium Club.

**This means that you can claim a voucher entitling you to £20 off a pair of glasses from Specsavers £99 range or above!**

### Exclusive offers on glasses

The Specsavers Premium Club is an eyecare package from Specsavers Opticians which gives you and your family exclusive deals on glasses. It's very easy - all you have to do is claim a voucher from Protocol National and then redeem it at any Specsavers Opticians store. Use of the vouchers is limited to one per transaction.

### You could save more than £20!

You can use this saving with many of Specsavers' in-store offers, including two-for-one, improved two-for-one, free reactions, 25% off varifocal glasses and free prescription sunglasses. Visit [www.specsavers.co.uk](http://www.specsavers.co.uk) to see the great styles available!



### Your family benefits too

It's not only you who benefits from the Specsavers Premium Club. You can also claim up to two additional vouchers for use by members of your family. All you and your family members have to do is present your vouchers in any Specsaver store to be eligible for the same great discount.

### Is there a catch?

Absolutely no catches, the terms of the offer are simple and completely free – you can claim up to three £20 Specsavers Premium Club vouchers to be used by you and your family. The vouchers show the full terms and conditions of the offer.



### WHAT DO I NEED TO DO NOW?

To claim your Specsavers Premium Club £20 voucher(s), we need to know your Visiting Lecturer reference number together with the number of vouchers required by you and your family (up to a maximum of 3). You can either:

email:  
[specsavers@protocol-national.co.uk](mailto:specsavers@protocol-national.co.uk)

or write to:  
Specsavers Offer,  
Protocol National, Castle Marina Road,  
Nottingham NG7 1TN.



## A new benefit from Protocol National

One of the advantages of being a Protocol National Visiting Lecturer is our ability to negotiate and make available to you supplier discounts and other favourable terms with national companies.

We have recently negotiated special terms with Origen (independent financial advisers) and AEGON Scottish Equitable for Visiting Lecturers registered on our database who wish to take out a personal stakeholder pension plan.

The terms of the arrangement allow you to take out an AEGON Scottish Equitable Stakeholder Pension Plan, after advice from Origen, **and to benefit from a reduction in the Annual Management Charge from 1% to 0.8%. This level of discount will apply for the term of the contract, even when you are no longer a Protocol National Visiting Lecturer.**

In case you were wondering, please be assured that Protocol National receives no financial or other benefit from either Origen or AEGON Scottish Equitable in relation to this arrangement. Any stakeholder pension arrangement would be a personal contract between you and AEGON Scottish Equitable and Protocol National will not make any contributions to the plan or have any involvement in setting up or administering the plan.

The following information has been prepared by Origen to help you decide if you wish to take things further.

### Stakeholder Pension Plans

**THE PRIMARY REASON FOR CONTRIBUTING TO A PENSION PLAN IS TO PROVIDE FOR AN INCOME (WITH THE OPTION TO TAKE A TAX-FREE LUMP SUM OF UP TO 25% OF THE FUND) IN RETIREMENT.**

Stakeholder pension plans were introduced in April 2001 to improve personal pension plans and make them less restrictive and more cost-effective. Government regulations mean that charges to a stakeholder plan should not exceed 1.5% of the total fund value for the first 10 years, and no more than 1.0% after that. There are no penalties for reducing or ceasing contributions, early retirement or

transfer (other than the possibility of a Market Value Reduction if you have elected to invest in a with-profits fund).

A stakeholder pension is a very flexible way of saving - you can make regular monthly or yearly payments, as well as one-off contributions, subject to a minimum contribution of £20.00 per month.

Founded in 1831, Scottish Equitable has grown steadily in size and expertise to become one of the most experienced and dependable companies in the financial sector. In 1994, it became part of the AEGON Group, one of the largest listed insurance companies in the world with assets under management of around £200 billion. Scottish Equitable plc is rated as 'AA' (very strong) by Standard and Poors - a leading ratings agency.

### What should I do next?

If you are interested in starting a stakeholder pension plan with AEGON Scottish Equitable, you can request a full application pack by completing the reply slip opposite and returning it to Origen. Origen will then contact you to discuss your requirements. They will be able to advise you on whether a stakeholder pension plan with AEGON Scottish Equitable will be suitable for your circumstances and they will take into account other pension arrangements that you might have.

At that stage you will receive:

- **Origen's terms of business and key facts about their services**
- **Information explaining the exact details of the plan**
- **A personal illustration which helps to show you how a stakeholder pension plan can work for you, and provide you with an estimate of the income you might receive when you retire**
- **An application form to fill in**



# Stakeholder Pension Plan for Visiting Lecturers

## How much should I contribute?

The decision on how much you pay into your pension is up to you, although you would need to give consideration to HM Revenue and Customs tax-efficient allowances.

The value of tax relief depends on your financial circumstances. Contributions will be paid net of basic rate tax. For example, if you wished to contribute £100.00 gross, you would pay net of basic rate tax i.e. £78.00. Any higher rate tax relief would be claimed through your self assessment tax return. Please note that tax rates, bases and reliefs may change in the future.

## How do I choose where to invest contributions?

AEGON Scottish Equitable offers a wide range of investment funds to choose from. Its funds have varying levels of risk to suit your individual attitude and requirements. You select your own investment fund(s) from the comprehensive range available – you can find details of these in the joining pack.

## And where can I obtain financial advice?

Neither Protocol National nor Origen is recommending this plan to you, or implying that a stakeholder pension plan is better than other retirement solutions for your personal circumstances. However, Origen will be able to provide you with advice in this respect.

**Contact Name:** John Evening

**Address:** Origen, Pyramid House, Solartron Road, Farnborough, Hampshire GU14 7QL

**Telephone:** 01252 557009

**Email:** johnevening@origenfs.co.uk



## WHAT DO I NEED TO DO NOW?

If you are interested in starting a stakeholder pension plan with AEGON Scottish Equitable, you can request a full application pack by completing the reply slip below and returning it to Origen.

## Protocol National Stakeholder Pension Reply slip

**PLEASE SEND ME FURTHER INFORMATION ABOUT THE AEGON SCOTTISH EQUITABLE STAKEHOLDER PENSION PLAN.**

**I WOULD BE INTERESTED IN CONTRIBUTING:**

£  PER MONTH

**NAME**

**ADDRESS**

**POST CODE**

**TELEPHONE NUMBER**

**EMAIL ADDRESS**

**VL NUMBER**

**PLEASE RETURN TO:**

**JOHN EVENING  
ORIGEN, PYRAMID HOUSE, SOLARTRON ROAD  
FARNBOROUGH, HAMPSHIRE, GU14 7QL.**

By completing this form you are agreeing for Origen to share information with Protocol National and to contact you with information about products and services that may be of interest to you.

If you do not wish to be contacted by any specific media, please indicate by ticking the appropriate box(es) below:

**POST**

**EMAIL**

**TELEPHONE**

Origen is a trading name of Origen Financial Services Limited which is authorised and regulated by the Financial Services Authority no. 192666. Tel: 0207 405 8535.

## Locations where you can have your documents processed in person

The following list shows the contact telephone numbers for Protocol National Staffing Co-ordinators based in colleges around the country.

If you wish to have your documents processed in person rather than posting them to our Nottingham office, please contact a Staffing Co-ordinator close to you and arrange a suitable time to visit.

### City College Birmingham

June Jewell  
or Vina Patel  
Tel: 0115 938 8338  
or: 0115 911 1271

### City of Sunderland College

Marie Graham or Emma Lee  
Tel: 0115 938 8324

### Enfield College

Natanya Jeffrey  
Tel: 0115 911 1272

### Cambridge Regional College

Kerry Smith  
Tel: 0115 911 1287

### Harrow College

Liz Bula  
Tel: 0208 909 6567

### Bournemouth and Poole College

Lisa Goodwin  
Tel: 0115 938 8337

### Lewisham College

Aktarun Khatun  
Tel: 0115 911 1274

### Lincoln College

Barbara Booth  
Tel: 0115 938 8325

### Liverpool Community College

Jacqueline Jones  
or Susan Mercer  
Tel: 0115 938 8339

### Newham College

Baljinder Dhutty  
Tel: 0115 938 8335

### North Tyneside College

Glynis Collins  
Tel: 0115 911 1276

### Middlesbrough College

Kirsty McMahon  
Tel: 01642 298943

### Park Lane College

Lisa Johnson or  
Rebecca Foster  
Tel: 0115 911 1277

### Protocol National

Nottingham Office  
Visiting Lecturer Support Team  
Tel: 0115 911 1166

### The Sheffield College

Josie Woolley  
or Lucy Broughton  
Tel: 0115 911 1278

### Salisbury College

Theresa Lewis  
Tel: 0115 938 8322

### South Cheshire College

Kim Crowley  
Tel: 0115 911 1280

### Halton College

Laura Ashley  
Tel: 0115 938 8321

### Telford College of Arts and Technology

Andrew Timms  
Tel: 0115 911 1281

### Kendal College

Protocol National  
Staffing Co-ordinator  
Tel: 0115 938 8323

### Wirral Metropolitan College

Laura Ashley  
Tel: 0115 938 8321

### Accrington and Rossendale College

Elaine Cannon  
Tel: 01254 354024

### Wakefield College

Stephanie Cheeseman  
Tel: 01924 361342

### Weston College

Abbie Sheridan  
or Joni Pascoe  
Tel: 0115 911 1283

### Shrewsbury College

Kym Edwards  
Tel: 0115 911 1279

### South Birmingham College

Susan Sullivan  
Tel: 0115 938 8330

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**New laws,  
important  
changes!**