

## Retirement (Including Flexible Retirement) Policy

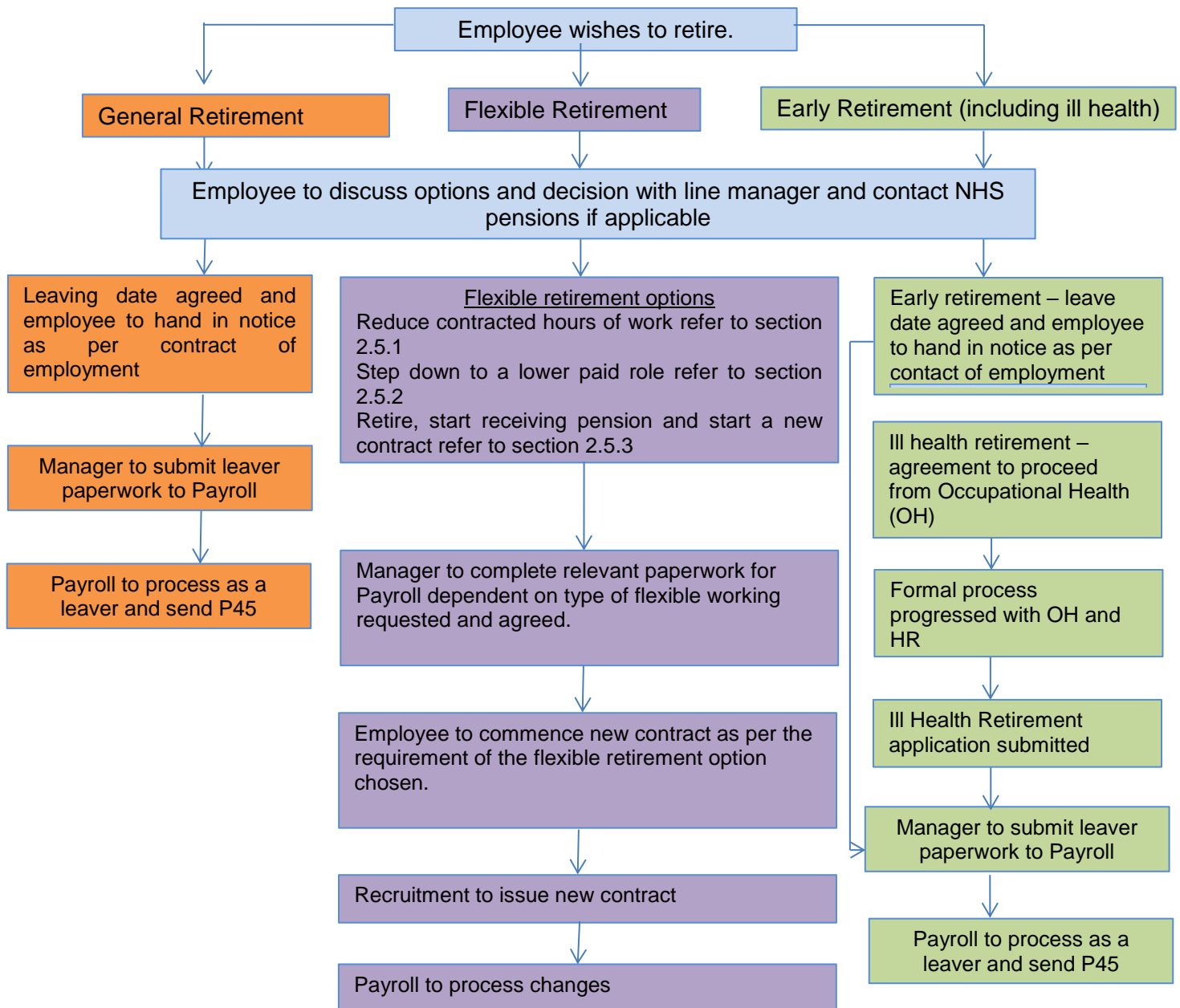
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<b>Target Audience-</b> who does the document apply to and <u>who should be using it.</u> - The target audience has the responsibility to ensure their compliance with this document by:	<ul style="list-style-type: none"> <li>Ensuring any training required is attended and kept up to date.</li> <li>Ensuring any competencies required are maintained.</li> <li>Co-operating with the development and implementation of policies as part of their normal duties and responsibilities.</li> </ul>		
<b>Special Cases</b>	There are no special cases		
<b>Accountable Director</b>	Director of Human Resources		
<b>Author/originator</b> – Any Comments on this document should be addressed to the author	HR Business Partner		
<b>Division and Department</b>	Corporate, Human Resources		
<b>Implementation Lead</b>	Head of Human Resources		
<b>If developed in partnership with another agency ratification details of the relevant agency</b>	N/A		
<b>Regulatory Position</b>	<p>This policy has been formulated to comply with relevant legislation e.g.</p> <ul style="list-style-type: none"> <li>Equality Act 2010 (Ref 12).</li> <li>Advisory, Conciliation, and Arbitration Service (ACAS) guidance (Ref 13).</li> </ul> <p>Any breach of this policy that may be considered fraudulent will be reported to the Local Counter Fraud Specialist for investigation, and may result in criminal and/or disciplinary proceedings being commenced.</p>		
<b>Review period.</b> This document will be fully reviewed every three years in accordance with the Trust's agreed process for reviewing Trust -wide documents. Changes in practice, to statutory requirements, revised professional or clinical standards and/or local/national directives are to be made as and when the change is identified.			

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## Instant Information – Retirement (Including Flexible Retirement) Flowchart



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# 1 Introduction & Purpose

## 1.1 Introduction & Purpose

Great Western Hospitals NHS Foundation Trust (the Trust) recognises that employees should be informed to enable them to retire when best for themselves, and to be provided with the opportunity to follow a flexible approach to retirement from the Trust.

The purpose of this policy is to:

- Provide a clear framework for managers to utilise during the management of retirement;
- To ensure requests for flexible retirement are fairly considered, so that the changing needs and requirements of the service can be fulfilled and that patient care is at the forefront of all decisions.
- Inform employees on the principles and practices that will govern the Trust's approach to retirement.
- Promote equity and fairness and give both managers and employees the opportunity to plan.

Any templates referenced in this policy are available on the Human Resources (HR) intranet page, under Retirement Toolkit.

## 1.2 Glossary/Definitions

The following terms and acronyms are used within the document:

<b>1-2-1</b>	One to One Meeting
<b>ACAS</b>	Advisory, Conciliation, and Arbitration Service
<b>ESR</b>	Electronic Staff Records
<b>GP</b>	General Practitioners
<b>HR</b>	Human Resources
<b>IHR</b>	Ill Health Retirement
<b>NHS</b>	National Health Service
<b>OH</b>	Occupational Health
<b>STAR</b>	Service, Teamwork, Ambition, Respect
<b>TRS</b>	Total Reward Statement
<b>TUPE</b>	Transfer of Undertakings

# 2 Main Document Requirement

## 2.1 Service, Teamwork, Ambition, Respect STAR values and Retirement (Including Flexible Retirement)

The Trust STAR values underpin the Retirement (including Flexible Retirement) Policy and Procedure, and represent the way in which the document is used in practice.

Values	Our Values are the foundation of everything we do – the way we act, the way we speak and the way we treat patients and colleagues. Our values represent who we are.
<b>Service</b> – We will put our customers first	<ul style="list-style-type: none"> <li>• Ensure all employees are capable of delivering exceptional service in their individual roles through their agreed working patterns.</li> <li>• For all employees to consider flexible retirement applications in</li> </ul>

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	<p>line with the needs of the service.</p> <ul style="list-style-type: none"> <li>• Make patient care and safety our priority.</li> </ul>
<b>Teamwork</b> – We will work together	<ul style="list-style-type: none"> <li>• For all employees to ensure they are familiar with the policy and that they adhere to the terms of this policy</li> <li>• For managers to ensure they apply the Retirement Policy fairly and consistently</li> <li>• To consider colleagues and their requirements when requesting flexible retirement.</li> </ul>
<b>Ambition</b> – We will aspire to provide the best service	<ul style="list-style-type: none"> <li>• For managers to ensure that the arrangements agreed do not negatively impact on the needs of the service</li> <li>• For employees to provide reasonable notice, in line with policy requirements, when requesting flexible retirement, to ensure that there is no adverse impact to the service</li> </ul>
<b>Respect</b> – We will act with integrity	<ul style="list-style-type: none"> <li>• For managers to ensure fair consideration for all reasonable requests for flexible retirement.</li> <li>• For all employees to be open and honest, whilst maintaining confidentiality.</li> </ul>

## 2.2 Retirement

Employees can choose when they wish to retire as there is no age limit to working. The Trust wishes to support its employees in maintaining a work/life balance. It does this through encouraging employees to consider their own working arrangements to ensure they meet the needs of the service along with their own personal needs to ensure good attendance at work.

There are a number of retirement options for employees to consider:

- General retirement (section 3)
- Flexible retirement (section 4)
- Early retirement (section 5)
- Early retirement on the grounds of ill health (section 6)

Employees should ensure that they adhere to the requirements outlined in this policy for retirement and requesting flexible retirement, and line managers should consider each request for flexible retirement fairly and consistently, taking into account the needs of the service.

## 2.3 NHS Pension Process

If the employee has an NHS Pension, NHS Pensions (Ref 6) recommend that at least **four** months' notice is given of the pending retirement to ensure that the pension is available from the date of retirement. Should less notice be given, this could result in the pensions benefit payment being delayed, therefore starting after the date of retirement.

The timescale is applicable in any scenario in which an employee is planning on withdrawing their NHS pension.

## 2.4 General Retirement Process

If an employee wishes to retire, the employee should speak with their line manager to discuss their decision. To formalise any agreement the employee should submit their written resignation to their line manager with their contractual notice period as per their contract of employment.

Upon receipt of the resignation the manager should complete a termination form electronically, with the reason for leaving being 'retirement'. Payroll will ensure that the necessary actions are taken to stop payment to the employee from the required date. Payroll will send the employee the necessary

forms that need to be completed for the pension to be available from the date of retirement. Once completed, the employee should return the forms to Payroll, who will submit them to NHS Pensions.

The employee's retirement under their NHS Pension is then considered to have begun; effective from the date the contract ends and the pension can be paid.

## 2.5 Flexible Retirement

Within the rules of the NHS pension scheme there are a number of alternative flexible retirement options available for employees as they approach the age at which they choose to take their pension including:

- Reduce contracted hours of work (section 2.5.1)
- Step down to a lower paid role (section 2.5.2)
- Retire, start receiving pension and start a new contract (section 2.5.3)

It is recommended that employees request a pension estimate from the Payroll Department and seek further detailed information regarding their pension and how the pension can be affected depending on the flexible retirement option they decide to take forward, from NHS Pensions or the Trust's Pensions Manager.

The employee's line manager should be an employee's first point of contact to discuss pathway options for flexible retirement. They should then seek further information from Human Resources or Payroll, if necessary.

Payroll are unable to give personal financial advice, employees are advised to seek independent financial advice in all matters concerning their pension or employees can obtain further information by visiting the NHS Pensions Website (Ref 6).

Employees with Transfer of Undertakings (TUPE) rights should carefully consider the effect that taking flexible retirement will have on those rights.

### 2.5.1 Reduce Contracted Hours of Work

The number of hours that an employee is contracted to work can be altered to decrease over an agreed period of time, leading up to retirement. The minimum number of hours to be considered is dependent on banding and whether employees are paid under Agenda for Change terms and conditions (minimum of 15 hours per week) or are paid under Medical and Dental terms and conditions (minimum of 16 hours per week).

Employees should be aware that pension benefits for part-time employees are reduced compared to an employee working full-time and therefore by moving from full-time to part-time work, rather than taking their NHS pension, their level of pension may be affected.

### 2.5.2 Step Down to a Lower Paid Role

It may be appropriate for employees to step down to a lower paid role and responsibility. If the request is made, managers can explore options, such as whether there is a lower grade post available within the department, or to restructure the service to create an additional lower grade of post within their department / team.

If there are no suitable lower grade options available within the employee's current department, alternative roles within the Trust can be considered.



Employees should be aware that pension benefits for lesser paid roles are reduced and may affect the level of pension. However, in such scenario, there may also be scope for preservation of pension at previous banding, depending on the NHS Pensions criteria.

**2.5.3 Retire, Start Receiving a Pension and Start a New Contract**

This allows an employee to retire and start receiving their NHS pension, whilst at the same time, return to work following a break in service and receive a salary in the usual way. This can be applied to both returning to a substantive contract or bank contract.

In order to activate the employee’s pension, the contract of employment must be brought to an end by the employee resigning and making a request to continue working via the flexible retirement request application form to be completed by the employee. When notice to resign is given it cannot be withdrawn unless both parties agree. The employee’s retirement under their NHS pension is then considered to have begun; effective from the date the contracts ends and the pension can be paid.

Following a break in service of at least **eight** days (this must include two Sundays), a new contract of employment will then be issued to the employee. If the employee is under the 1995 pension scheme, upon returning to the Trust; the employee is restricted to work no more than **16** hours per week for the first calendar month from their retirement date. After the first calendar month following taking occupational pension, the number of hours worked per week can increase beyond 16. If the employee is taking retirement under the 2008 and / or 2015 pension benefits, then after the Trust service break as stated above the employee can return to work on whatever hours are agreed by their Manager. However in all the above cases the number of hours it is possible to work before the amount of pension received is affected will vary from person to person. Further advice about each individual case should be sought from the Payroll Team or NHS Pensions (Ref 6).

Continuous previous service with an NHS employer will count as reckonable service in respect of NHS agreements on, occupational maternity leave / pay, and occupational sick pay. Annual leave entitlement will be calculated on the basis of combined NHS service.

For the purposes of and in accordance with Sections 210 – 219 of the Employment Rights Act 1996, covering Statutory Employment Rights, your continuous service with the Trust, will commence at the start of your flexible retirement contract.

**2.5.4 Procedure for Requesting Flexible Retirement**

When an employee decides that they would like to make a flexible retirement request, they should complete an application form (Appendix C) and submit this to their line manager for consideration.

Should an application form be submitted that is incomplete, this will be returned to the employee, by their line manager, to review and re-submit, delaying the 28 day period for the Application Meeting.

Once a complete request has been received the line manager will consider it against service requirements.

Upon receipt of the request, an Application Meeting should be arranged by the line manager with the employee within 28 days, to discuss the request in more detail. Part B of the application form should be completed within the meeting.

If the request can be accommodated, or a compromise can be reached in order to accommodate a flexible working request, the employee will be notified in writing within 14 calendar days of the meeting, confirming the agreed arrangement and effective start date.

If a manager cannot accommodate a flexible working request or is unable to reach a compromise with the employee, they will be notified within 14 calendar days of the meeting which will include the justification for declining the request.

An Application Meeting is an informal meeting however the Trust will allow employees to bring a workplace companion, trade union representative or an official employed by a trade union and certified as being competent to accompany a worker. Should the employee wish to be accompanied at their Application Meeting then HR will also attend the meeting.

All flexible working requests, including any appeals will be considered and decided upon by the appointed appeal hearing Manager within three months of receipt of the complete request. This can be extended by agreement with the employee. All requests will be considered in the order that they are received. Each case will be considered on its merits taking into account the business case.

### 2.5.5 Considerations

The Trust will handle all flexible retirement requests in a reasonable manner. In doing so the following criteria will usually be taken into account when making a decision:

- The employee's role and tasks and the effect that the requested change would have on the department and service provisions.
- If the change requested by the employee is operationally viable.
- The workflow of the role and the complexity of the tasks undertaken within the employees role.
- The workload of the role and whether any work can be redistributed within the department.
- The structure of the department and employees.
- The level of supervision of the post holder necessary to cover the new arrangement.
- The impact on other employees workload of the new flexible working arrangement.
- The cost impact of any new arrangement.
- Other issues particular to the working of the department / business, including, but not limited to skill sets, recruitment restrictions and supervision levels.

### 2.5.6 Right to Refuse

A line manager can refuse a flexible retirement request if they consider that one or more of the following grounds apply:

- The burden of any additional costs is unacceptable to the Trust.
- The change will have a detrimental impact on the quality of the service provision.
- The change will have a detrimental effect on the ability to meet service needs.
- Inability to reorganise work among existing employees.
- Inability to recruit additional employees.
- Detrimental impact on service performance.
- Insufficiency of work during the periods the employee proposes to work.
- Planned structural changes where the flexible working may not fit with these plans.

(Please note that this list is not exhaustive).

### 2.5.7 The Right to Appeal

- An employee has the right to appeal against any formal decision made at all stages of this policy. Appeals should be made in writing to the HR Representative who attended the meeting or is aligned to the individuals Division, no later than **seven** calendar days from receipt of the letter confirming the outcome of the request.



- Any appeal must explain the grounds for doing so, which must either be that the employee felt the decision was unreasonable, the manager did not take into account all the evidence or the employee has further evidence which may affect the outcome.
- An appropriate manager will be appointed to hear the appeal, and the employee will be invited to attend an appeal meeting without unreasonable delay, usually within 14 calendar days of receipt of the appeal letter. The appeal meeting is a formal meeting and employees have the right to be accompanied.
- The appeal manager may request the original manager to attend the appeal hearing as a witness to ensure rationale of the original decision is clear.
- The employee should be informed of the decision in writing and the decision of the appeal meeting will be final.

### 2.5.8 The Right to be Accompanied

- Employees have the right to be accompanied to meetings within all stages of this policy and its procedure.
- Employees can be accompanied by a workplace colleague, a trade union representative or an official employed by a trade union and certified as being competent to accompany a worker. There is no right to be accompanied by a solicitor or legal representative.
- An employee can request to reschedule an informal or formal meeting once, for up to seven calendar days, from the original date of the meeting to allow more time for preparation and/or due to the availability of their companion.
- If the employee is unwilling or unable to attend a rescheduled meeting, the appointed manager will use the available evidence to make their decision and confirm this in writing to the employee.

### 2.6 Early Retirement – by taking NHS Pension

Employees may be eligible to choose early retirement and obtain benefits from an NHS pension scheme at, or after, age 50. Employees should check their Pension Scheme rules for full information.

Pension forecasts can be sought from total reward statement (TRS), this will have the employee pension benefit value. TRS can be accessed via ESR – employee self-service. For an ESR log in contact the Workforce Intelligence Team. Questions relating to pension or TRS can be directed to Payroll.

### 2.7 Early Retirement on the Grounds of Ill-health (Ill Health Retirement – IHR)

An application for ill health retirement can be initiated as a recommendation by an Occupational Health (OH) Physician, where it is unlikely the employee will be able to return to work within the foreseeable future, and it is dependent on whether the employee meets the specific criteria, as dictated by NHS Pensions. An employee may also wish to apply without OH recommendation, which could then be supported by a General Practitioner (GP) or specialist.

The employee should make a request for ill health retirement by writing to their manager. Once the notification is received, the Divisions' HR representative will request an IHR application form from Payroll, which is usually received within five working days. Payroll will complete part of section A, where appropriate, and the remainder should be completed by HR alongside the employee's line manager, in a timely manner. This will then be posted to the employee to complete Section B and OH will subsequently complete Section C. Once completed, the form will be sent from OH directly to NHS Pensions. OH will request medical reports to support the application. This may incur a cost to the line manager's budget.

NHS Pensions should confirm receipt of the application to both the employee and HR, however there is no set timescale for a decision to be made. A further letter will be sent to the employee, and a copy

to the Trust, to confirm whether the IHR application is granted, and will confirm the relevant tier (1 or 2 information regarding this can be found at <https://www.nhsbsa.nhs.uk/sites/default/files/2017-03/Key%20Notes-III%20health-20161122-%28V2%29.pdf>

Following this, a Stage Three Formal meeting, under the Absence Management (Sickness) Policy (Ref 4), will be held; at this point the employee is to decide whether they wish to retire (resign) on the grounds of ill health; a voluntary decision in which they will have up to one year from the date of their successful ill health NHS Pensions letter, and subsequent formal meeting, to decide. If the employee decides not to resign, following their acceptance of the ill health retirement pathway (Ref 6), and they are unable to return to work in the foreseeable future, taking all other relevant information into account, then a dismissal on the grounds of ill-health capability, under the Absence Management (Sickness) Policy (Ref 4), will take place.

### 3 Monitoring Compliance and Effectiveness of Implementation

The arrangements for monitoring compliance are outlined in the table below: -

Measurable policy objectives	Monitoring or audit method	Monitoring responsibility (individual, group or committee)	Frequency of monitoring	Reporting arrangements (committee or group the monitoring results is presented to)	What action will be take if gaps are identified
Internal departmental audits of flexible working requests to demonstrate understanding of policy and process.	Yearly Audit	HR	Yearly	HR Reports	1-2-1 with department manager to explain the flexible retirement policy and completion
Monitor the levels of retirement (including flexible retirement) applications for Divisions and departments	Monthly reporting	HR	Monthly division meeting, including 1-2-1 with Matrons and Department managers	HR Reports	Areas of concern, including that of high volumes of applications ,will be raised to the ER manager and Head of HR. Concerns will also be discussed in 1-2-1 with Matrons and Divisional Directors

## 4 Duties and Responsibilities of Individuals and Groups

### 4.1 Chief Executive

The Chief Executive is ultimately responsible for the implementation of this document.

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#### 4.2 Ward Managers, Matrons and Managers for Non Clinical Services

All Ward Managers, Matrons and Managers for Non Clinical Services must ensure that employees within their area are aware of this document; able to implement the document and that any superseded documents are destroyed.

#### 4.3 All Managers

- Consider all requests made in line with this policy and procedure fairly and equitably.
- Complete all relevant documentation and letters in a timely manner, as per the timeframes dictated within this policy and procedure.
- Ensure appropriate support is offered to employees when applying this policy.

#### 4.4 Employees

Employees must:

- Complete the relevant application for flexible and other types of retirement, and submit to their line manager.
- Discuss openly with their line manager their request for flexible and other types of retirement.
- Be responsible for arranging suitable representation where appropriate.

#### 4.5 Human Resources

Human Resources will:

- Support the manager with meetings and provide guidance if required.
- Ensure this policy is applied in a fair and consistent manner.
- Review the effectiveness of the policy and procedure.
- Provide solutions focussed advice, taking into account relevant employment legislation.
- Ensure meetings under this policy are conducted without unreasonable delay.
- Ensure this policy and procedure is accessible to all employees.
- Provide training upon request and on-going support to managers who may be required to use this policy and procedure.

#### 4.6 Recruitment Team

The Recruitment Team will process any applications and ensure any new contracts, or variation to contract letters are completed and sent to employees.

#### 4.7 Payroll

The Payroll Team will amend any relevant changes into Electronic Staff Records in a timely manner.

#### 4.8 Trade Unions

Trade Unions will:

- Provide support and guidance to employees.
- Will represent the employee if the employee requests representation.
- Support with HR the review of the effectiveness of the policy.

#### 4.9 Occupational Health

Occupational Health will:

- Ensure employees are able to access a confidential counselling service through Staff Support Services.
- Complete required forms in a timely manner.

#### 4.10 Document Author and Document Implementation Lead

The document Author and the document Implementation Lead are responsible for identifying the need for a change in this document as a result of becoming aware of changes in practice, changes to statutory requirements, revised professional or clinical standards and local/national directives, and resubmitting the document for approval and republication if changes are required.

## 5 Further Reading, Consultation and Glossary

### 5.1 References, Further Reading and Links to Other Policies

The following is a list of other policies, procedural documents or guidance documents (internal or external) which employees should refer to for further details:

Ref. No.	Document Title	Document Location
1	Flexible Working Policy	T Drive
2	Trust STAR Values	Intranet
3	Performance Management Policy	Intranet
4	Absence Management (Sickness) Policy	Intranet
5	Counter Fraud Policy	T Drive
6	NHS Pensions	<a href="http://www.nhsbsa.nhs.uk/pensions">www.nhsbsa.nhs.uk/pensions</a>
7	Agenda for Change	<a href="http://www.nhsemployers.org">www.nhsemployers.org</a>
8	Retirement Toolkit	Intranet
9	Employee Recognition Policy	T Drive
10	Equality and Diversity Strategy	Intranet
11	Maintaining Professional Standards Policy	Intranet
12	The Equality Act 2010	<a href="http://www.equalityhumanrights.com">www.equalityhumanrights.com</a>
13	ACAS Guidance	<a href="http://www.acas.org.uk">www.acas.org.uk</a>

### 5.2 Consultation Process

The following is a list of consultees in formulating this document and the date that they approved the document:

Job Title / Department	Date Consultee Agreed Document Contents
Acute Physiotherapy	16.09.2020
Community Physiotherapy	16.09.2020
HR Team	10.09.2020
Head of Payroll	16.09.2020
Recruitment Team Leader	16.09.2020
Occupational Health Nurse Manager	16.09.2020
Pension's Manager	16.09.2020
Ward Manager	11.09.2020

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## 6 Equality Impact Assessment

An Equality Impact Assessment (EIA) has been completed for this document and can be found at Appendix A.

## Appendix A - STAGE 1: Initial Screening For Equality Impact Assessment

At this stage, the following questions need to be considered:			
1	What is the name of the policy, strategy or project? Retirement (Including Flexible Retirement)		
2.	Briefly describe the aim of the policy, strategy, and project. What needs or duty is it designed to meet?  Great Western Hospitals NHS Foundation Trust (the Trust) recognises that employees should be informed to enable them to retire when best for themselves, and to be provided with the opportunity to follow a flexible approach to retirement from the Trust.  The function of this policy is to provide a clear framework for managers to utilise during the management of retirement, and to ensure request for flexible retirement are fairly considered, so that the changing needs and requirements of the service can be fulfilled and that patient care is at the forefront of all decisions. Any templates referenced in this policy are available on the Human Resources (HR) intranet page, under Retirement Toolkit.  The purpose of this policy is to inform employees on the principles and practices that will govern the Trust's approach to retirement. It is intended to promote equity and fairness and give both managers and employees the opportunity to plan.		
3.	Is there any evidence or reason to believe that the policy, strategy or project could have an adverse or negative impact on any of the nine protected characteristics (as per Appendix A)?		<b>No</b>
4.	Is there evidence or other reason to believe that anyone with one or more of the nine protected characteristics have different needs and experiences that this policy is likely to assist i.e. there might be a <i>relative</i> adverse effect on other groups?		<b>No</b>
5.	Has prior consultation taken place with organisations or groups of persons with one or more of the nine protected characteristics of which has indicated a pre-existing problem which this policy, strategy, service redesign or project is likely to address?		<b>No</b>

Signed by the manager undertaking the assessment	R Scott
Date completed	8 <sup>th</sup> September 2020
Job Title	Acting HR Business Partner

On completion of Stage 1 required if you have answered YES to one or more of questions 3, 4 and 5 above you need to complete a [STAGE 2 - Full Equality Impact Assessment](#)

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## Equality Impact Assessment

### Are we Treating Everyone Equally?

Define the document. What is the document about? What outcomes are expected?

Consider if your document/proposal affects any persons (Patients, Employees, Carers, Visitors, Volunteers and Members) with protected characteristics? Back up your considerations by local or national data, service information, audits, complaints and compliments, Friends & Family Test results, Staff Survey, etc.

If an adverse impact is identified what can be done to change this? Are there any barriers? Focus on outcomes and improvements. Plan and create actions that will mitigate against any identified inequalities.

If the document upon assessment is identified as having a positive impact, how can this be shared to maximise the benefits universally?

### Our Vision

Working together with our partners in health and social care, we will deliver accessible, personalised and integrated services for local people whether at home, in the community or in hospital empowering people to lead independent and healthier lives.



Trust Equality and Diversity Objectives			
Better health outcomes for all	Improved patient access & experience	Empowered engaged & included staff	Inclusive leadership at all levels

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## Appendix B - Flexible Retirement Application Form

**Part A** of the application form should be completed by the employee.

**Part B** of the form should be completed between the line manager and employee during the review meeting (if applicable).

**Part C** is to be completed by the manager following the review meeting.

### Part A: Request Details

<b>Name:</b>		<b>Job Title:</b>	
<b>Start Date with Trust:</b>		<b>Department/Team:</b>	
<b>Reason for requesting Flexible Retirement:</b>			

Describe your current working pattern in detail:

<b>Hours:</b>	
<b>Days of the week worked:</b>	
<b>Shifts (Please state):</b>	

State flexible retirement pathway requested:

	<b>Tick required</b>	<b>Specified Details</b>
<b>Early Retirement</b>		<b>Date of proposed retirement:</b>
<b>Reduced working hours to part time working:</b>		<b>Hours you would like to reduce to:</b>
<b>Retire, start receiving</b>		<b>Last working day prior to retirement:</b>

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<p><b>your pension and recommence employment (Retire and Return) – Substantive Employment</b></p>		<p><b>Date due to return, following retirement</b> (must be a minimum of 8 days, to include 2 Sundays):</p> <p><b>Position / Job Title following Retirement:</b></p> <p><b>Band:</b></p> <p><b>Hours:</b></p> <p><b>Salary and Incremental point:</b></p> <p>(Please state any additional allowances to be awarded / previously accrued i.e. additional annual leave):</p>
<p><b>Retire, start receiving your pension and recommence employment (Retire and Return) – Bank Contract to be awarded</b></p>		<p><b>Last working day prior to retirement:</b></p> <p><b>Date due to return, following retirement</b> (must be a minimum of 8 days, to include 2 Sundays):</p> <p><b>Scope of work requested:</b></p>

If the department is unable to support your request, would you like to discuss any alternative arrangements with your line manager?

Yes  No  (Please tick)

## Part B: Justification for Request

All employees requesting flexible retirement must fully complete the below justification for flexible retirement, so that any request can be considered fairly and equitably. This should be completed and discussed by both the employee and line manager.

<b>How will your current responsibilities have to be altered in order to suit the flexible retirement request?</b>	
<b>What are the benefits to the organisation of agreeing to your request?</b>	
<b>How will this change impact upon your team, other teams/departments and external organisations? Have you discussed your request for flexible working with others in your team?</b>	
<b>Please state any other information that you think is relevant to your application, which you would like to be considered by your manager?</b>	

N.B. Please continue on a separate sheet of paper if required.

## Part C: Outcome Section

Managers decision (please tick to state one of the outcomes below);

- Application has not been successful.
- Request has been accepted subject to certain amendments as outlined below
- Request for a flexible retirement has been reviewed and accepted.

<b>Rationale for agreeing/rejecting application:</b>	
<b>Details of Arrangement:</b>	
<b>Key Dates (i.e. start date of arrangement or dates retirement and employment commence)</b>	
<b>Letter sent to confirm the arrangements agreed:</b>	Yes / No (Please circle)  Date Letter Issued:  - - / - - / - - - -

### Signatures

<b>Manager Signature</b>	Signature:  Date:  - - / - - / - - - -
<b>I confirm that this flexible retirement request has been discussed with me and I agree to the adjustments to my working arrangements</b>	Signature:  Date:  - - / - - / - - - -
<b>Employee Signature</b>	

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