

RETIREMENT & FLEXIBLE RETIREMENT POLICY

POLICY NUMBER:	HR9
VERSION NUMBER:	2
KEY CHANGES FROM PREVIOUS VERSION	Reviewed and updated policy
AUTHOR:	HR Business Partner
CONSULTATION GROUPS:	Policy Sub-Group Workforce Transformation Group Joint Partnership Committee
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POLICY SUMMARY	
<p>The Retirement policy sets out the framework for the Trust's approach to the management of staff retiring from the Trust; their entitlements and arrangements, ensuring that all staff are treated fairly and equally. It recognises the need to take a flexible approach to retirement in order to maximise effective workforce planning</p>	
The Trust monitors the implementation of and compliance with this policy in the following ways:	
<p>Retirement reports are generated on an as and when needed basis based on Trust requirements such as a specific work plan or internal / external audit. In addition monthly reports are produced to generate retirement certificates from CEO.</p>	

SCOPE

Services	Applicable	Comments
Trust Wide	✓	

The Director responsible for monitoring and reviewing this policy is the Executive Director of People and Culture

ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST

POLICY ON RETIREMENT AND FLEXIBLE RETIREMENT

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SAMPLE ONLY

ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST

POLICY ON RETIREMENT

Assurance Statement

The Retirement policy sets out the framework for the Trust's approach to the management of staff retiring from the Trust; their entitlements and arrangements, ensuring that all staff are treated fairly and equally. It recognises the need to take a flexible approach to retirement in order to maximise effective workforce planning, allowing the Trust to deliver its *Core Values*.

1.0 POLICY STATEMENT

- 1.1 In line with the Equality Act 2010 staff may voluntarily retire at the time of their choosing and may draw their pension in line with NHS Pension Scheme guidelines, Local Government Pension Scheme (LPGS) guidance or State Government Pension Scheme guidance.
- 1.2 The Trust recognises that individual circumstances and capabilities are different therefore staff may choose to retire at an age that is appropriate to them. This policy intends to make the transition from work to retirement a smooth informative process for staff.
- 1.3 Pensionable age is the minimum age at which an employee may retire and receive benefits under the pension scheme into which they contribute to.
- 1.4 For employees who are members of the 1995 section of the NHS Pension Scheme, pensionable age is normally age 60 but it can be 55 for Nurses, midwives, Health Visitors, Occupational Therapists, and Physiotherapists (dependant on service and being in post prior to 6th March 1995). For Staff who joined the NHS Pension Scheme after 1st April 2008, the pensionable age is 65. For both NHS pension schemes it may be possible for an employee to retire earlier provided that the employee has satisfied certain criteria (the pension will also be reduced for early payment).
- 1.5 Retirement may also be taken at the age of 55 by any member of staff who has 20 years' service with Mental Health Officer status and has been a member of the 1995 section of the NHS Pension Scheme since 6th March 1995.
- 1.6 Mental Health Officer status applies to those staff who are members of the 1995 section of the NHS Pension Scheme and who meet the Pensions Agency definition. Staff who fall within this category must have officially registered such service.

- 1.7 Members of the Local Government Scheme Pension must refer to their LGPS guidance for details on pensionable age.

2.0 SCOPE OF POLICY

- 2.1 This policy applies to all Trust Staff who meet the criteria for retirement.

3.0 REFERENCE TO OTHER TRUST POLICIES

- Supervision and Appraisal Policy (HR48)
- Employee Wellbeing, Sickness & Ill-Health Policy (HR26)
- Flexible Working Policy (HR39)

END

SAMPLE ONLY