Flexible Retirement Policy

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1.0 Introduction

1.1 Flexible retirement is one of a number of policies that assist employees in balancing and managing their job throughout the employment life cycle. However, this must be balanced with the changing needs of the trust and the trust's commitment to providing high quality services.

1.2 It applies to all support staff of the trust ('green book' employees) who are members of the Local Government Pension Scheme (LGPS) and who meet the qualifying criteria.

1.3 If agreed, the employee will partially retire either by reducing hours or pay. The individual would receive accrued pension to date and continue to work under the revised arrangements.

2.0 Qualifying criteria

2.1 To qualify for flexible retirement employees must be:

- 2.1.1 aged 55 or over,
- 2.1.2 a member of the LGPS,
- 2.1.3 have two or more years membership or transferred other eligible pension rights into the LGPS,
- 2.1.4 The Trust's qualifying criteria: requesting a minimum of 20% reduction in hours and/or a reduction of at least one grade below the current role with commensurate permanent reduction in salary.

2.2 If the qualifying criteria is met this does not mean that the request will be agreed, only that the individual is eligible to make a request.

2.3 Employees already drawing their pension will not qualify for flexible retirement.

3.0 Flexible retirement and multiple contracts of employment

3.1 A request can be made to flexibly retire from just one contract/post as the release of accrued pension benefits will be for the post where flexible retirement has been agreed. It will not impact on any pension which has been accrued for other/secondary contracts.

3.2 Please note that any flexible retirement approval would result in a permanent change to the employment contract and would be viewed as a one-off step towards permanent retirement. The trust's expectation therefore is that there would be no subsequent increase to the grade and/or total hours of work i.e. it would not be permissible to take a further role with the trust that would have the effect of increasing earnings.

4.0 Applying for flexible retirement

4.1 Please complete the application form at the end of this policy.

4.2 On receipt of the application the trust will consider the request (if the qualifying criteria are met). The request will be considered in two stages and both need to be agreed in order for a flexible retirement to be agreed.

4.3 **Stage one** considers whether the qualifying criteria has been met and whether the school can operationally support the reduction in grade or hours.

4.4 **Stage two** considers the financial cost of releasing the pension and the final authorisation process.

4.4 If the request is refused the employee stays on their current terms and conditions and there is no right of appeal if the request is turned down.

4.5 A further application can be made although there must be a minimum of 12 months between each request made for flexible retirement.

5.0 When a request is accepted

5.1 If a request is accepted, the contract will change to reflect the new arrangement. This is a permanent change to the contract of employment. The individual will receive a new statement of particulars and letter from the head teacher that confirms these changes.

6.0 Drawing pension benefits and flexible retirements

6.1 If the trust agrees to flexible retirement the individual would have to draw:

6.1.1 all of the benefits that relate to any pre 1 April 2008 membership, plus
6.1.2 all, none or some of the benefits that relate to their membership from 1 April 2008 to 31 March 2014, plus
6.1.3 all, none or some of the benefits that relate to their pension built up from 1 April 2014, plus any additional benefits including added years, additional pension being purchased either through APCs/SCAPACs or ARCs, additional pension awarded by the council and any AVCs (should the individual choose to draw these).

7.0 Multiple requests for flexible retirement

7.1 If a request for flexible retirement is accepted a further request for flexible retirement cannot be made.

7.2 A flexible retirement request allows for the release of pension, which can only be done once. Therefore, any further agreement to reduce hours or grade will not be accompanied by a further release of pension.

7.3 If at the time of making the flexible retirement application the employee has more than one contract of employment with the trust, they must make clear which contract(s) the application relates to. In the event of an application being approved employees will not at a later time be eligible to apply for flexible retirement in respect of any other contract i.e. it is viewed by the school as a one-off step towards permanent retirement.

7.4 If the application is accepted once the hours or grade have been reduced the individual cannot then return to their previous arrangements

8.0 Applying for flexible retirement as part of an application for another role

8.1 Flexible retirement can be applied for as part of an application for another role. However, the job must be at least one grade below the current role or on the same grade but with a minimum 20% reduction of hours.

8.2 If an individual is already in receipt of a flexible retirement pension they can still apply for another role as long as it does not increase hours or pay.

9.0 Accruing pension against the changed contract

9.1 Pension will be accrued against the changed contract.

For further information regarding your pension – please use this link

http://www.lgpsmembers.org/