



# Flexible Retirement Policy

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## DOCUMENT CONTROL INFORMATION

Version	Date	Author	Status (S/D)	Description of Change
1.0	12/09/12	Matthew Hammonds	D	Draft of new policy
2.0	07/01/13	Matthew Hammonds	D	Updated to incorporate comments from WPPG
3.0	05/02/13	Matthew Hammonds	D	Updated to incorporate comments from JSG and PPG
4.0	11/04/13	Matthew Hammonds	D	Updated to incorporate further comments from WPPG
5.0	05/06/13	Matthew Hammonds	D	Updated following feedback from TEG
6.0	02/08/13	Matthew Hammonds	A	Approved policy for issue
6.1	Feb 19	Christine Brereton	D	Policy reviewed and remains fit for purpose with no changes. Proposed next review date 3 years.
7.0	Feb 19	Christine Brereton	A	Feb 19 TMG – Reviewed and agreed review date of 3 years.

A = Approved D = Draft

Document Author = Matthew Hammonds

This document is controlled.  
If you would like to suggest amendments to this document please contact the document author.

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## 1. STATEMENT OF INTENT

**This policy supports the principles of the Workforce Strategy 2012-17 'YAS People.' The Trust recognises the organisational benefits of offering flexible retirement options to employees, including improving retention and workplace morale. The Trust will provide appropriate support and information to staff who wish to exercise any of the available flexible retirement options as outlined in this document.**

## 2. INTRODUCTION

- 2.1 The Trust is committed to ensuring that an effective, consistent and fair procedure exists when dealing with flexible retirement requests.
- 2.2 This policy aims to promote flexible retirement and the options available to staff. The organisation will seek ways of accommodating the aspirations of the staff in line with the needs of the business.
- 2.3 The key principles outlined in this document are based on the guidance document 'NHS Pension Scheme retirement flexibilities' issued by NHS Employers.
- 2.4 The Trust is committed to supporting staff when they choose to retire and will provide information relating to NHS Pensions when requested.
- 2.5 The Trust recognises that supporting flexible retirement has the potential to significantly contribute to the delivery of the 5 year Trust Workforce Plan.

## 3. PRINCIPLES

- 3.1 The Trust recognises that employees may wish to exercise flexibility regarding the age at which they retire, the length of time they take to retire or the nature and intensity of work in the lead up to final retirement.
- 3.2 Following the removal of the default retirement age (DRA) with effect from 1 October 2011, the Trust will no longer assume that employees will retire at any specific age.
- 3.3 Retirement is a voluntary choice. So long as an individual wants to, and is able to carry on working beyond 65, it is their legal right to do so. No dismissal will take place on the grounds of age.
- 3.4 Yorkshire Ambulance Service offers Pension and Financial Awareness seminars to help individuals prepare for their retirement, with particular reference to making decisions regarding when to retire, wills and investments.
- 3.5 By law, NHS pensions officers may not provide financial advice to scheme members. This caveat also applies to HR staff, NHS trade unions and NHS pensions staff. So, while they have a duty to provide information about the scheme and options, they may not advise staff which option to take.
- 3.6 If staff wish to retire and return to either the same role or a role within the same job family for which they match the KSF for e.g. Paramedic to Paramedic then provided there are sufficient funded posts available and this does not affect the progression of other members of staff, there will be no requirement for the member of staff to go through the full recruitment process i.e. application, interview, assessment etc. However the member of staff would need to be able to satisfy the safe employment checks outlined in the Pre and Post Employment Checks

Policy. The member of staff would also need to satisfy the requirements of any physical fitness tests for the role they are proposing to retire and return to. Retire and return requests should be signed off by the appropriate line manager in consultation with the relevant budget holder.

3.7 If staff wish to retire and return into a role that is significantly different to their previous role e.g. Paramedic to Finance Assistant then staff would need to apply for advertised roles through NHS Jobs and be subject to the same assessment processes as other candidates. Advice on the similarity between roles can be sought from a member of the HR team if required.

3.8 Flexible retirement is not a statutory right but the Trust will make every effort to accommodate requests for flexible retirement where possible.

3.9 If a member of staff wishes to retire and return by claiming their pensions benefit and reducing their hours then this can be agreed in locality by the appropriate manager, and only the additional hours will be required to go to cost control for approval, e.g. if a member of staff wanted to take the option of retire and return and reduce their working hours from 37.5 per week to 30, then this could be approved in locality with only the outstanding 7.5 hours having to be submitted to the cost control process for recruitment purposes.

#### 4. FLEXIBLE RETIREMENT OPTIONS

4.1 The key flexible retirement options are outlined in the table below:-

<b>Wind down:</b>	As an alternative to retiring, staff can opt to wind down by working fewer days or hours in their current post. This would be classified as a flexible working request and should be considered in accordance with the Trust 'Flexible Working Policy.'
<b>Step down:</b>	Staff who would like to give up the pressure and responsibilities of their current role can opt to step down into a less demanding and lower graded (paid) post, which still makes use of their skills and experience. Consideration as to whether an application and assessment is required should be considered in line with point 3.5 and 3.6 above.
<b>Retire and return to the NHS:</b>	Staff who wish to retire can opt to retire, take all their pension benefits and return to NHS Employment. If staff wish to retire and return to employment within YAS then consideration and process in line with point 3.6 should be followed.
<b>Draw down:</b>	This is only open to members of the 2008 section of the NHS Pension scheme. Draw down allows members to take part of their pension benefits while continuing in NHS employment.
<b>Late retirement enhancement in 2008 section:</b>	If a member chooses to retire later than their 65 <sup>th</sup> birthday, the pension benefits earned up to their 65 <sup>th</sup> birthday will be increased by the application of late retirement factors.

#### 5. EQUALITY IMPACT ASSESSMENT

Yorkshire Ambulance Service NHS Trust is committed to ensuring that the way that we provide services and the way we recruit and treat staff reflect individual needs, promote equality and does not discriminate unfairly against any particular individual or group.

This policy embraces diversity, dignity and inclusion in line with emerging Human Rights guidance. We recognise, acknowledge and value difference across all people and their backgrounds. We will

treat everyone with courtesy and consideration and ensure that no-one is belittled, excluded or disadvantaged in any way, shape or form.

## **6. IDENTIFICATION OF STAKEHOLDERS (SCOPE OF POLICY)**

This policy and procedure applies to all employees irrespective of their contract status (fixed term, temporary workers, honorary, trainee etc) employed by the Trust or volunteers or contractors working on Trust sites and will apply to issues raised on a collective as well as an individual basis.

## **7. PROCESS FOR REVIEW AND REVISION**

This policy will be reviewed in five years' time unless legislative or other changes necessitate an earlier review.

## **8. ASSOCIATED DOCUMENTATION**

This policy operates in conjunction with the following Trust policies and procedures:

- Flexible Working Policy and Procedure
- Recruitment and Selection Policy and Procedure

## **9. REFERENCES**

NHS Pension Scheme Retirement Flexibilities

<http://www.nhsemployers.org/PayAndContracts/NHSPensionSchemeReview/PensionChoice/Pages/PensionSchemeflexibilities.aspx>