



Flexible Retirement Policy

Support Staff

Our vision is to enable all to flourish.

Status and review cycle: Statutory and every two years

Responsible group: Trust Board

Implemented: April 2024

Reviewed: August 2024

Next Review Date: April 2026

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1.1 Policy statement

1.1 The Trust is an organisation with a Christian foundation. The ethos, values and relationships of the Trust, and its associated schools, are central to witnessing to the value of the foundation. The Trust is committed to supporting employees who may decide to seek flexible retirement. 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 school - and for central team members accessing this policy, the school and Trust's commitment to providing high quality services.

2.0 Purpose and scope

2.1 This policy applies to all school support staff 'green book' and central team staff who are members of the Local Government Pension Scheme (LGPS) and who meet the qualifying criteria.

2.2 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.

2.3 If an employee's request for flexible retirement is accepted then no further requests can be made. The difference being that a flexible retirement request allows for the release of pension, which can only be done once. Therefore, any further agreement to reduce an employee's hours or grade will not be accompanied by a further release of pension.

2.4 Headteacher's and line managers must follow the management guidance for flexible working requests and submit any request with the head of governance and people who will request the flexible retirement estimate from the GCC Business Service Centre.

3.0 Qualifying criteria

3.1 To qualify for flexible retirement employees must be:

- aged 55 or over,
- a member of the LGPS,
- have two or more years membership or transferred other eligible pension rights into the LGPS,
- 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.

3.3 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.

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

4.0 Flexible retirement and multiple contracts of employment

4.1 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.

4.2 Please note that any flexible retirement approval would result in a permanent change to the employment contract.

5.0 Applying for flexible retirement

5.1 All requests for flexible retirement must be requested by completing the application form at the end of this policy.

5.2 On receipt of the application the Headteacher or line manager will meet with the employee to discuss the request. Following this meeting, the headteacher will submit the request to the HoGP (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.

5.3 Stage one considers whether the qualifying criteria has been met and whether the school (or in the case of central team staff the central team) can operationally support the reduction in grade or hours. The HoGP will confirm with the headteacher that the school can operationally support the request made. If the school cannot operationally support the request, then the request is declined at this stage.

5.4 Stage two considers the financial cost of releasing the pension and the final authorisation process. Stage two must be undertaken in accordance with the limits for financial authorisation in the Trust Finance Policy. On receipt of the flexible retirement request form, the HoGP will request a flexible retirement estimate from the GCC Business Service Centre and will liaise with the Head of Finance to determine if any pension costs are affordable to the Trust. A contract change form **must not** be completed until confirmation of the request being authorised has been received from the HoGP.

5.5 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.

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

6.0 When a request is accepted

6.1 If a request is accepted, the HoGP will write to the employee to confirm the request has been authorised. The employee's employment 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 GCC Business Service Centre that confirms these changes.

7.0 Drawing pension benefits and flexible retirements

7.1 If the Trust agrees to flexible retirement the individual would have to draw:

- all of the benefits that relate to any pre 1 April 2008 membership, plus
- all, none or some of the benefits that relate to their membership from 1 April 2008 to 31 March 2014, plus
- 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).

8.0 Multiple requests for flexible retirement

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

8.2 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.

8.3 If at the time of making the flexible retirement application the employee has more than one contract of employment with the school or Trust, they must make clear which contract(s) the application relates to.

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

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

9.1 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.

9.2 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.

10.0 Accruing pension against the changed contract

10.1 Pension will be accrued against the changed contract.

11.0 Appeal

Once a decision has been made regarding a flexible retirement request in line with the steps outlined in this policy, there is no right of appeal.

12.0 Flexible Retirement Application Form

To make an application to flexibly retire in accordance with the provisions of the Local Government Pension Scheme contained in the LGPS Regulations 2014, in the first instance, please read the Trust's Flexible Retirement Policy to check eligibility.

Please complete all sections of this form, once completed please submit the request to the Headteacher or your line manager who will make arrangements to discuss the application with you prior to submitting your request to the HoGP. Each application will be considered seriously but there is no automatic right to flexible retirement.

1. Personal Details:
Name: _____ Grade: _____
Post Title: _____
Team: _____

2. I would like to be considered for flexible retirement by:
<input type="checkbox"/> Reduction in contracted hours Contracted hours to be reduced from: to:
<input type="checkbox"/> Appointment to lower graded post (with commensurate reduction in salary) Post title: Grade:
<input type="checkbox"/> Appointment to lower graded post incorporating a reduction in hours: Post title: Grade: Hours from: to:

I am aware that, if agreed, this flexible retirement package would result in a permanent change to my employment.
3a. Describe the current working pattern (days/hours worked)
3b. For a request for reduced hours, describe the proposed working pattern (days/hours)
3c. Proposed date of commencement of flexible retirement package (if agreed)

Employee's signature

Date:

Please send the completed application to the Headteacher or your line manager who will consider stage one of the request. The headteacher or line manager should then submit the request to the HoGP for stage two to be actioned.

Decision

I confirm that this request for a reduction in hours and/or grade/rate of pay can be accommodated/cannot be accommodated (delete as appropriate).

Head of Governance and People		Date	
Headteacher/line manager		Date	

If accepted, please ensure a copy of this form is sent to the payroll provider.

Flow chart

