



Appendix 8: Retirement Policy

Name	Retirement Policy
Summary	This policy aims to provide the best support and practical information to enable employees to experience as smooth a transition from work to retirement as possible.
Associated Documents	
Target Audience	All staff
Version number	1.0
PIN policy	Supporting the Work-Life Balance
Date of this version	August 2015
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Date of full impact assessment	
Name of Board	National Waiting Times Centre
Approving committee/group	SMT/Partnership Forum
Document Author	

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Golden Jubilee Foundation Values Statement

What we do or deliver in our roles within the Golden Jubilee Foundation is important, but the way we behave is equally important to our patients, customers, visitors and colleagues. We know this from feedback we get from patients and customers, for example in “thank you” letters and the complaints we receive.

Recognising this, the Golden Jubilee Foundation have worked with a range of staff, patient representatives and managers to discuss and promote our shared values which help us all to deliver the highest quality of care and service across the organisation. These values are closely linked to our responsibilities around Equality.



Our values are that we will:

- Take responsibility for doing our own job well
- Treat everyone we meet in the course of our work with dignity and respect
- Demonstrate through our actions our commitment to quality
- Communicate effectively, working with others as part of a team
- Display a “can do” attitude at every opportunity.

Our policies are intended to support the delivery of these values which support employee experience.

1 Introduction

The Golden Jubilee Foundation recognises that the change from work to retirement is one of the most significant events encountered during a person's life. This policy aims to provide the best support and practical information to enable employees to experience as smooth a transition from work to retirement as possible.

This policy applies to employees with a confirmed retirement date who have given 6 months' notice of their intention to retire. In exceptional circumstances where the notice period is less than 6 months the policy may be applied with mutual agreement between employer and employee.

2 Principles

All employees for whom this policy applies will be given the opportunity to access the benefits detailed in this policy. There is now no compulsory retirement age. However, employees should contact the HR department 13 months before they wish to retire to state their intent in regard to retirement. The HR department will then arrange an individual interview with the member of staff 9 months before the proposed date of retiral in order that a 'Retiral Plan' may be drawn up.

3 Working Hours Reduction

In order that an employee can adjust to the prospect of retirement, a gradual reduction in working hours may be introduced three months prior to retirement,

- Third month before retiral - 80% of contracted hours
- Second month before retiral - 60% of contracted hours
- Last month before retiral - 40% of contracted hours days

During this time employees will be paid as if at work. The pattern of reduced hours can only be permitted on the basis shown, i.e. the paid time off cannot be aggregated over a longer or shorter period.

4 Preparation for Retirement

Employees will be given the opportunity to attend the pre-retirement course where they will have access to a wide range of information and be given information to prepare them for their retiral. To encourage long and healthy retiral employees will have access to a health check and advice from the Occupational Health Department.

5 Staff Termination/ Pensions Application

Pension applications and notification of termination should be completed four to six months before the date of retirement in order to ensure that pensions are paid timeously. If an employee is considering any return to work options following receipt of their Scottish Public Pensions Agency (SPPA) retirement benefits they are advised to check the implications of this on the benefits already in payment with SPPA. When an employee has retired, their contract of employment will be terminated. If they wish to return to NHS employment the employee will be required to apply for an advertised position. Employees who have previously retired utilizing the working hours reduction option will not be entitled to take this option again.

6 Monitoring, Review and Evaluation

This policy and procedure has been assessed for relevance and screened for equality impact, to identify and mitigate, where possible, any potential for the policy and procedure to have differential impact on employees having regard to their differences, such as ethnicity, gender, disability, age, sexual orientation, religion, literacy or belief.

This policy will be monitored, reviewed and evaluated every three years by the Partnership Forum or equivalent, taking into consideration legislative changes and developments in good practice to ensure it meets the needs of all employees.