

Retirement Policy

Policy Code:	HR7
Policy Start Date:	September 2022
Policy Review Date:	September 2025

Please read this policy in conjunction with the policies listed below:

- HR11 Teachers Pay Policy
- F4 Discretionary Policy

1 Policy Statement

- 1.1 The Priory Federation of Academies Trust's policy is that employees may continue working until they give notice that they wish to retire. The Trust has no contractual retirement age. The Trust acknowledges that retirement should be a matter of choice for individuals and will not pressurise employees into resigning because they have reached or are approaching a certain age.
- 1.2 The Trust is proud to employ people of all ages, it considers that age diversity is beneficial to the Trust and is committed to not discriminating against employees because of age and adhere to the principles set out in our Equal Opportunities Policy.
- 1.3 References to the Trust or Academy within this policy specifically include all primary, secondary and special academies within the Trust, as well as the Early Years setting at the Priory Witham Academy, Priory Apprenticeships and Lincolnshire SCITT.
- 1.4 This policy does not form part of any member of staff's contract of employment and it may be amended at any time.

2 Roles, Responsibilities and Implementation

- 2.1 The Pay, Performance and HR Committee has overall responsibility for the effective operation of this policy and for ensuring compliance with the relevant statutory framework. This committee delegates day-to-day responsibility for operating the policy and ensuring its maintenance and review to the Trust Human Resources Lead.
- 2.2 Leaders and Managers have a specific responsibility to ensure the fair application of this policy and all employee are responsible for supporting colleagues and ensuring its success.

3 Aims

- 3.1 To ensure a fair and equitable approach to the retirement of the Trust's employees and to provide a uniform and equitable approach to the management of retirement.

4 General Principles

- 4.1 Employees who wish to retire from their employment are required to resign and give notice of their intended date of retirement to the Head of Academy or the Trusts Human Resources Lead in writing. The length of notice must not be less than their contractual notice period.

- 4.2 Employees are encouraged to give an early indication of their planned retirement date as this will assist the Trust in ensuring appropriate succession plans are in place. There is no obligation for the Trust or the employee to hold workplace discussions about their future plans, but it may be mutually beneficial to do so on an informal basis.
- 4.3 Employment or promotion prospects will not be prejudiced because an employee expresses an interest in retiring or changing work patterns.
- 4.4 If an employee indicates that they are thinking of retiring, they are free to change their mind at any time until they have actually given notice to terminate their employment.
- 4.5 If an employee expresses an interest in moving to a more flexible working pattern or changing role, the Trust will confirm that this is what they want before any action is taken which could affect their employment, such as a change to their role or responsibilities. Alternatively, the employee may wish to make a request to change their working arrangements under the Trust's Flexible Working Policy.
- 4.6 The Trust will consider requests for flexible retirement on a case by case basis in line with the Trust F4 Discretionary Policy.
- 4.7 In certain circumstances, and subject to scheme rules, the Trust may be able to agree ill health retirement. Employees who wish to be considered should contact their Human Resources Business Partner.

5. Procedure

- 5.1 Once an employee has decided that they wish to retire, they should inform their Head of Academy or the Trusts Human Resources Lead in writing of their intended retirement resignation date, in accordance with their contractual notice period.
- 5.2 The Trust will write to the employee acknowledging receipt of the employee's notice of retirement resignation letter.
- 5.3 The Head of Academy will inform the Trusts Human Resources Lead, and if applicable, will meet with the employee to discuss arrangements for leaving, including the intended leaving date, succession and handover plans, pension details and flexible retirement.
- 5.4 Once a leaving date has been agreed, the Trust will write to the employee confirming their last day of employment, and the normal arrangements for leaving the Trust will apply.

5.5 A resignation form needs to be completed by the Head of Academy PA or Human Resources, the original is sent to the Payroll Department and a copy is put on the employee's personnel file.

6. Policy Change

This policy may only be amended or withdrawn by The Priory Federation of Academies Trust.

The Priory Federation of Academies Trust Retirement Policy

This Policy has been approved by the Priory Federation of Academies' Pay, Performance and HR Committee:

Signed..... Name..... Date:

Trustee

Signed..... Name..... Date:

Chief Executive Officer

Signed..... Name..... Date:

Trusts Member of Staff

Please note that a signed copy of this agreement is available via Human Resources.