

Headteacher: Ms Angela Wallace BA Hons, PGCE, MA

Drafted by: HR in consultation with Judicium

Reviewed: March 2022

Next Review : November 2023

RETIREMENT POLICY

Introduction

This policy aims to demonstrate the school's commitment to ensuring age diversity in its workforce and tackling age discrimination in retirement. The school recognises the contributions of all employees, including the skills and experience of older employees.

This policy applies to employees of the school only (who will be referred to as "you" in this policy). It does not form part of any employee's terms and conditions of employment with the school and is not intended to have contractual effect.

The school may amend this policy from time to time and will notify employees of any changes to this policy within one month of the date on which the change takes effect.

The school does not operate a fixed retirement age. However, it may from time to time review the need for a fixed retirement age to reflect its operational and educational needs.

The school acknowledges that retirement is a matter of choice for individuals and will not pressurise employees into resigning because they have reached or are approaching a certain age.

Employees are free to retire whenever they choose and the school is proud to employ people of all ages as it considers that age diversity is beneficial to the organisation. The school is committed to not discriminating against employees because of age and adheres to the principles set out in the Equal Opportunities and Diversity Policy

Purpose of the Policy

This policy forms part of the school's underlying strategy to promote equal opportunities and to avoid unlawful discrimination. In following the retirement procedure set out within this policy, the school will not discriminate directly or indirectly on grounds of age, nor on grounds of disability, gender

Part of the

Mulberry
Schools Trust



reassignment, marital or civil partner status, pregnancy or maternity, race, religion or belief, sex or sexual orientation.

The school believes that employees should be allowed to continue to work for as long as they wish, and when to voluntarily retire should be a matter of choice for individual employees.

This policy sets out the procedures that will be followed in cases of retirement, ensuring compliance with employment law and aims to create a framework for workplace discussions, enabling employees to express their preferences and expectations with regard to retirement and enabling the school to plan for educational and pastoral continuity for its pupils.

Discussing your Future Plans

The school will not assume that you wish to retire simply because you are approaching a certain age or that your performance at work will necessarily decline with age.

The Headteacher and/or Human Resources may want to meet with you to discuss your short, medium and long-term plans, as the need arises. For example, if your personal circumstances change or a promotion opportunity arises, you may wish to explore a different working pattern or to stop work altogether.

The school needs to plan for its organisational, educational, pastoral needs and requirements and may indicate to staff from time to time that it would be helpful to know what their plans are. There is no obligation for you or the school to hold workplace discussions about your future plans, but it may be mutually beneficial to do so.

The school will not make generalised assumptions that performance will decline with age, whether due to competence or health issues. If the school thinks there are problems concerning your performance or ill-health, these will be dealt with in the usual way, through the appropriate policies.

If a workplace discussion takes place the school will aim to make it as informal as possible.

During any workplace discussion the school will not:

- assume that you want to retire just because you are approaching a certain age, such as state pension age; and
- make discriminatory comments, suggesting that you should move on due to age.

If you indicate that you are thinking of retiring, you are free to change your mind at any time until such time as you have actually given notice to terminate your employment.

Your employment or promotion prospects will not be prejudiced because you have expressed an interest in retiring or changing work patterns.

Flexible Working

If you indicate a wish to alter your working arrangements in the run up to your retirement, the school will discuss this with you and if any changes are agreed, the school will reflect these in your terms and conditions of employment. If appropriate, an application using the procedure set out in the school's Flexible Working Policy may be required.

Expressing an interest in retirement or a flexible working arrangement will not prejudice your continued employment or promotion prospects.

Giving Notice of Retirement

If you decide to retire, you are required to give no less than your contractual notice period, as set out within your contract of employment. That being said, you are encouraged to give as much notice as possible of your plans to retire, in order to assist the school's succession planning and to enable an orderly handover of your work.

If you change your mind about retiring after you have given the school formal written notice of your retirement, the school is not obliged to allow you to withdraw that notice, but may exercise its discretion to allow you to do so.

On receipt of your notice of resignation, the school will:

- give you written acknowledgement of your resignation and confirmation of your last date of employment; and
- discuss with you any leaving arrangements, such as handover and succession plans, pension arrangements etc.

The other usual arrangements and procedures for leaving the school's employment will also apply.

Pension

If you are a member of the Teachers' Pension Scheme or the Local Government Pension Scheme, the benefits you receive if you take your pension will be determined in accordance with the provisions of the pension scheme to which you belong.

Whenever you decide to retire, the extent of any benefits will depend on a number of factors, which in turn depend on the type of pension scheme. Full details of the Scheme are accessible from HR or www.lgpsmember.org and <https://www.teacherspensions.co.uk/>.

For further information, please contact the Human Resources Manager.

