



Policy:

HR 005 Retirement

Executive or Associate Director lead	Director of Human Resources
Policy author/ lead	Human Resources Adviser
Feedback on implementation to	Human Resources Adviser

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Ratified by	Executive Directors Group
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Target audience	All SHSC employees
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Keywords	Retirement, Pension, Gratuities, Buffet, Gift
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This is version 4 of this policy. This version replaces version 3, ratified in October 2016. This version was reviewed in order to transfer it to the appropriate format for policies and updated in order to amend some references and updates for its contents.

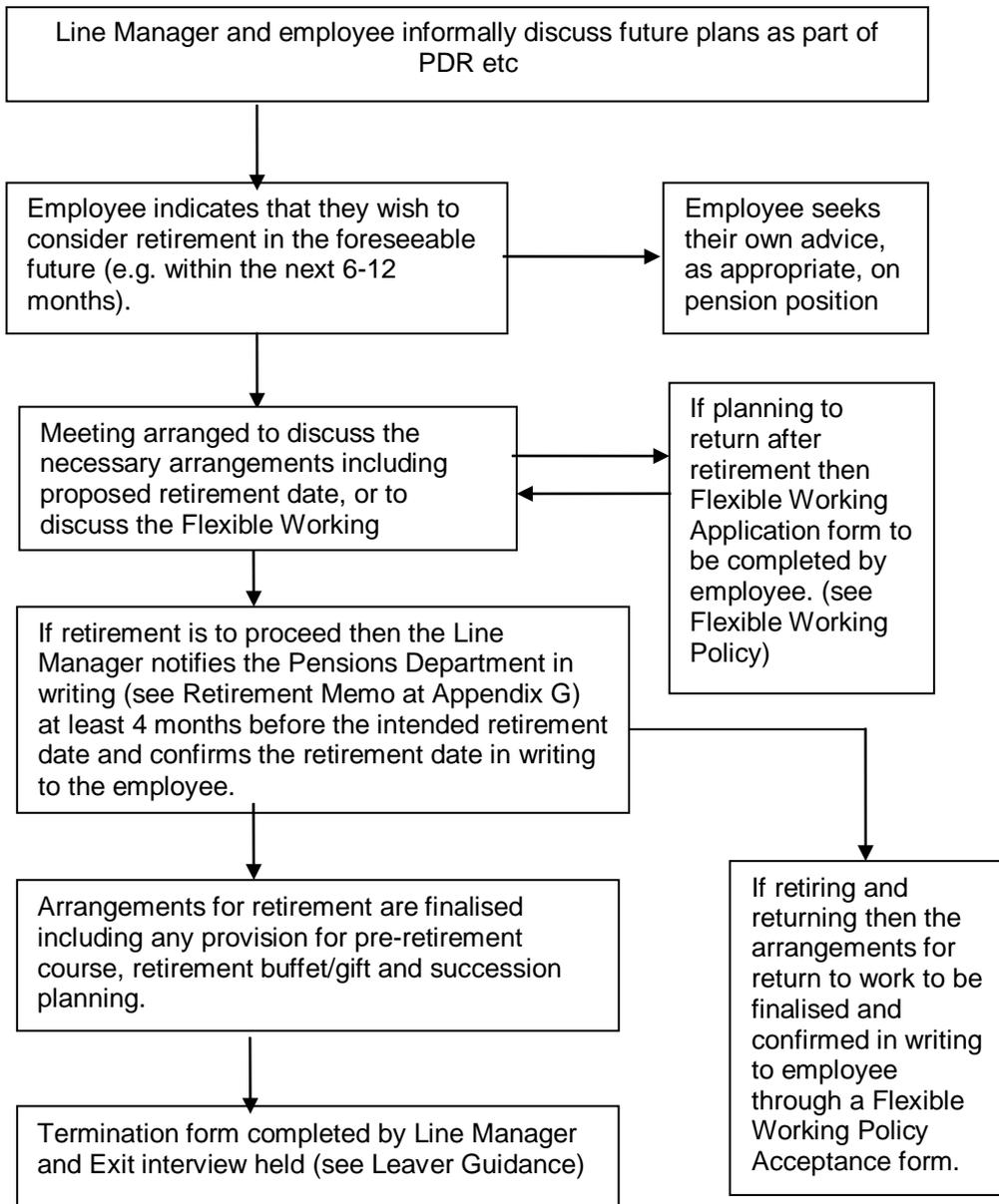
This policy will be available to all staff via the Sheffield Health & Social Care NHS Foundation Trust Intranet and on the Trust's website. The previous version will be removed from the Intranet and Trust website and archived. Word and pdf copies of the current and the previous version of this policy are available via the Director of Corporate Governance.

Any printed copies of the previous version (V3.0) should be destroyed and if a hard copy is required, it should be replaced with this version.

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Flow Chart



1. Introduction

We wish to ensure that when a member of our workforce leaves their role, they do so in a planned, structured and supported way. This includes the transition to retirement.

The Trust aims to have a diverse workforce and develop its skills and talents. It recognises the contribution that all employees can make at all ages and also the importance of appropriate age diversity.

The policy sets out the procedure for employees who are working towards retirement in the near future and has been developed from best practice and relevant legislation. It provides guidance so that managers and employees are aware of the retirement options available. The policy also provides information on the NHS Pension Scheme.

A discussion about possible retirement will not result in the Trust making any assumptions about the employee's commitment to the Trust. The Trust seeks to retain the best talent, including older employees. Workplace discussions are an informal opportunity for both the Trust and employees to plan jointly for the future.

2. Scope

The policy applies to all SHSC employees.

3. Definitions

Normal retirement age. There is no longer a Trust normal retirement age. As of 1st October 2011 (when the statutory default retirement age of 65 was removed) the Trust also moved away from having a compulsory contractual retirement age of 65. From that date employees who reach or have reached the age of 65 continue in post in the normal way as with other employees.

Employees can still choose to retire at age 65 if they wish. This will not necessarily apply to all employees as they may:

- retire at an earlier age
- continue working beyond this age
- retire on the grounds of ill health
- hold „special class“ or „MHO“ status *

4. Purpose

The purpose of the policy is to:

- assist employees considering retirement and help managers to also understand the options and support available
- enable the Trust to undertake workforce planning including retention of key skills
- promote age diversity within the workforce
- improve the wellbeing of employees by enabling them to plan constructively for their retirement and explore options which suit their individual circumstances
- improve engagement with employees by facilitating discussion between staff and managers on retirement options
- meet the requirements of relevant legislation.

* please note: members of the „special classes“ are not eligible to remain in the NHS Pension Scheme after their 65th birthday.

5. Duties

The **HR Director** will be responsible for ensuring the policy is implemented and reviewed.

Managers will be responsible for:

- Timely consideration and discussion with employees regarding their retirement options and intentions.
- Arranging meeting/s with the employee to discuss arrangements for retirement, including the intended retirement date, succession and handover plans, pension details and phased retirement, if applicable.
- Notifying the Pensions Department at Victoria Pay Services in writing at least 4 months in advance of the intended retirement date (or where this changes, the manager must notify the Pensions Department at Victoria Pay Services of this change).
- Writing to the employee acknowledging the employee's notice to retire.
- Drawing the attention of the retiring employee to the availability of pre-retirement training at no cost to the employee. Details of this training are available from the Intranet.
- Drawing the attention of the contractual implications of a decision to retire and return to an employee who wishes to explore this option (see section 6.5).
- Consideration of options for retirement courses, if requested.

Employees will be responsible for:

- Raising with their manager their intentions regarding retirement in order that a timely discussion can occur and the Pensions notification process can take place.
- Informing their line manager in writing as far in advance as possible and, in any event, in accordance with his/her notice period as set out in the contract of employment. This will assist the Trust with its succession planning.
- Considering their own pension provision and take independent financial advice before making any decision in relation to retirement.

The **Human Resources Department** will be responsible for:

- Providing advice and guidance on the operation of the policy.
- Monitoring the operation of the process.

6. Process

6.1 Normal Retirement Age

The removal of the compulsory retirement age represents an opportunity to review current practices and processes. This would include ensuring that there is regular communication with all employees about their future plans / expectations. Having such discussions will help identify training or development needs and provide an opportunity to discuss future work requirements and how these might impact on the member of staff. Employees who are interested in retirement can be signposted to the opportunities for voluntary / flexible retirement under the rules of the appropriate pension scheme and subject to the relevant Trust processes.

Although, managers and staff should discuss future aspirations as part of, for example, the PDR process, it is important to note that any discussion about retirement should be voluntary and is for the employee to initiate.

An employee who has decided to retire will often have considerable knowledge in relation to his/her role and responsibilities. The Trust may require the employee's assistance and cooperation for succession planning.

Prior to retirement, employees should assist, if requested to do so, by:

- providing full written details of the status of work projects and future steps;
- developing a job description, including key competencies and skills required for the role;
- ensuring a smooth handover of work; and
- assisting in training any successor.

6.2 Early retirement

The 1995 section of the pension scheme provides for an employee, who is a member of the scheme, to claim benefits at age 60 without reduction in the value of the pension. (For special classes, e.g. if holding Mental Health Officer status, the age is 55 rather than 60).

Members of the 1995 section of the pension scheme normally can take reduced pension benefits at any age from 50 on the grounds of Voluntary Early Retirement.

The arrangements within the 2008 section of the pension scheme allow voluntary early retirement from age 55. The Pension will be reduced if the employee retires before 65.

The arrangements within the 2015 pension scheme allow voluntary early retirement from age 55. The Pension will be reduced if the employee retires before Normal Pension Age.

If considering the option of early retirement, the employee should consult with the Pensions Department at Victoria Pay Services for further information.

Once the employee has established their personal position with regard to pension benefits and any potential advantages or disadvantages involved in their intended course of action, a meeting should be arranged with the Line Manager to discuss the

options. If there is a need for a break in service, prior to a return to work, the line manager must contact HR before this is agreed.

6.3 Pension

All new employees of the Trust are automatically made members of the NHS pension scheme but can opt out if they wish. Similarly, a current member of the pension scheme, can decide to withdraw from it and rejoin it at any time if they comply with the appropriate regulations and requirements of the scheme.

Some employees who are transferred into the Trust (members of a local authority pension scheme for example), may be able to retain membership of their local authority scheme. There are separate arrangements for staff who are in the South Yorkshire Pension Scheme. You should contact the Scheme Administrators on 01226 772923.

The Trust is unable to give personal advice about pension issues. Requests for information about pension benefits and the operation of the scheme should be directed to the Pensions Department at Victoria Pay Services (please refer to section 12). The Pensions Department at Victoria Pay Services are not permitted to give financial advice and employees requiring such advice should consult an independent financial adviser.

6.4 Notification to Pensions Department of the intention to retire

To make sure that pension benefits are available the day after the employee's retirement, the Pensions Department at Victoria Pay Services needs to be informed at least 4 months before the date of retirement.

Such notification will be undertaken by the line manager, and a model memorandum is attached at Appendix G.

6.5 Flexible Retirement and Pension

The Trust recognises that flexible retirement options can provide a number of mutual benefits.

These include:

- creation of a richer staff resource - full-time, part-time or available in periods of peak activity.
- better utilisation and transfer of skills and knowledge from experienced employees.
- improving morale among employees who take advantage of retirement options they might not have thought were available to them.
- flexible retirement alternatives protect or enhance (dependent upon circumstances) pension income.

However, flexible retirement options need to be consistent with service provision and resource utilisation so it cannot necessarily be the case that an employee's preferences will be met.

Employees will need to know what effect flexing retirement pension plans will have on their pension benefits and income. Alternatives to conventional retirement exist and can have the effect of protecting pension income. The Scheme Guide to the NHS Pension

Scheme sets out the retirement arrangements within the 1995 scheme, the 2008 scheme and the 2015 scheme, and is available at: <http://www.nhsbsa.nhs.uk/Pensions.aspx>. Employees need to read these carefully if considering flexible retirement options. Employees should refer to the arrangements in the Pension Scheme Guide before making a final decision.

If employees wish to explore the options, it is recommended that they seek information from the Pensions Department at Victoria Pay Services (please refer to section 13), or the Pensions Agency. The Help Line number for the Pensions Agency is 0845 421 4000 (you will need to have your pension reference or national insurance number available).

Once the personal position with regard to pension benefits has been established and any potential advantages or disadvantages involved in the intended course of action, a meeting should be arranged with the Line Manager to discuss the options.

Any request to retire and return should be made through an application under the Flexible Working Policy and Procedure, so that appropriate consideration may be given to the request, and also to ensure that reasons for any decision not to allow such a request are documented and justified. This process also allows for the option of an appeal. Employees should not assume that the change will be automatically agreed as this will depend on the nature of the service requirements at the time.

If an employee does retire and return, a break in service of two full continuous weeks is required. The line manager should contact HR before this is agreed. This break in service will have an impact on any potential future payment under the MARS Scheme or under redundancy provisions, as the basis of the calculation for such a payment will be the start date of the return, and will not include any service prior to the initial retirement date.

If agreed, confirmation of the arrangement should be confirmed in writing by the Line Manager through the Flexible Working Acceptance Form, and the relevant ESR form should then be completed.

If retirement is to proceed, on whatever grounds, the Line Manager will complete a retirement memorandum (see Appendix G) for the Pensions Department at Victoria Pay Services.

6.6 Preparation for Retirement course

The Trust will seek to provide employees with the opportunity, with paid time off to attend a Preparation for Retirement Course. (As the courses are subject to availability, there is no guarantee that you will secure a place).

Employees should speak to their Line Manager and Human Resources who will identify what is available and appropriate about attendance on such a course. Any reasons for refusal of a request to attend an available course should be clarified in writing.

6.7 Retirement on ill-health grounds

If an employee has at least two years' membership in the NHS pension scheme and is unable to undertake any regular employment or unable to do their own job then the employee may be able to retire early and take their pension benefits.

The Scheme Guides to the NHS Pension Scheme set out the relevant benefits in their respective sections on "Illness, life assurance and family benefits".

If an ill-health retirement is pursued, the application for ill-health retirement is available from the Pensions Department at Victoria Pay Services (please refer to section 12).

The application for retirement must be supported by a GP, a Consultant, or Occupational Health and the final decision regarding acceptance is the decision of the NHS Pensions Agency.

The employee may request an estimate of the ill-health retirement benefits that may be paid. This information can be obtained by contacting Victoria Pay Services.

Once an application for ill health retirement has been approved the Manager needs to complete various forms to finalise the retirement. The manager must ensure the employee is informed of the position and has signed a consent form to the ill health retirement. The correspondence will then be forwarded to the Pensions Department at Victoria Pay Services (please refer to section 12).

There are separate arrangements for staff who are in the South Yorkshire Pension Scheme. You should contact the Scheme Administrators on 01226 772923.

If the application for ill health retirement is accepted by either the NHS Pensions Agency or South Yorkshire Pensions, the Line Manager will be notified and a termination date agreed. The appropriate form would then be sent to the employee to claim benefits.

If the application is rejected and no suitable post can be found then it may be necessary to for the employment to be terminated due to the employee's ill-health.

If the application is rejected, there is a right of appeal to the appropriate Pensions Department.

6.8 Retirement gratuities

With the cessation of a compulsory retirement age, employees are able to choose whether or not they retire at age 65. Nevertheless the Trust would like to continue to recognise the contribution of employees and so, where notified that a retirement is to occur, the relevant arrangements, set out below, will apply.

However, where an individual retires and returns to work for the Trust after applying for payment of their pension these arrangements will only apply at the initial point of retirement. Any gratuity allowances would therefore be based on the accumulated years of service only up to that initial retirement date.

Should an employee retire and then return to the Trust in any capacity, they will not be entitled to any further retirement gratuities under these provisions at any later point.

Eligibility

The Trust will provide a retirement buffet and gift in recognition of loyalty to the NHS or Local Authority in respect of long service. This applies to normal, ill health or early retirements.

Retirement Buffet

If an employee has worked for a minimum of **15 years**“ continuous service (full-time or part-time) in the NHS or Local Authority they are entitled to an allowance of **£5 per year** for each completed year of service, to be spent on a retirement buffet provided by the Trust on their premises. If the individual organising the buffet wishes to use Fulwood House then they should contact the Building Manager first to determine whether there are any particular requirements which need to be met.

If the employee decides that they wish this money to be used to provide a meal at an alternative venue, they should check whether payment will be required by cheque by the relevant business or organisation, i.e. the caterer or the restaurant, or via an invoice.

If the employee chooses to have a buffet at a restaurant/public house rather than on Trust premises, then other than a partner and any children, the guests should be work colleagues past and present.

The employee can decide to use the money to cater for the buffet themselves. In these circumstances, they must submit receipts to the value of the allowance to the Management Accounts Section at Fulwood House.

There is no option of receiving the cash equivalent in lieu of a buffet, nor can it be added to the value of the gift allowance.

Retirement Gift

An employee who has a minimum of 20 years“ continuous service (full-time or part-time) in the NHS or Local Authority, is entitled to an allowance of £5 per year for each completed year of service for a gift in addition to the retirement buffet.

The gift should be selected from a place of the employee“s choice. If the item chosen exceeds the gift allowance (this should not be greater than the allowance to which the employee is entitled from the Trust) the employee should pay the difference before the collection of the gift. The gift should be reserved in the employee“s name, and details of the relevant business, organisation or shop to which the cheque needs to be made payable should be provided on the Retirement Entitlement Request form (see Retirement Gift and Buffet Procedure Policy).

Cash equivalents are possible; however, sufficient notice is needed to make sure that this payment can be made along with the final salary. Employees will be subject to income tax on the gift allowance, which means that they will incur a loss on the amount which is payable.

If an employee chooses to purchase their own gift and then seek reimbursement, this can only take place if the amount reimbursed is subject to tax, i.e. they would not get back the full gift allowance.

The Line Manager will confirm the entitlement to both the buffet and the gift allowance and obtain the Retirement Entitlement Request form (see Retirement Gift and Buffet Procedure Policy) for completion.

6.9 Retirement presentation

If there is a retirement buffet on Trust premises it is normal practice for the retirement gift to be presented at this event.

7. Dissemination, storage and archiving (Control)

Human Resources policies are referred to in employees' contracts of employment and statement of terms. Policies are available through the Human Resources portal on the SHSC intranet and, if necessary, a paper copy can be provided by the HR Department. This policy was last agreed in 2012 and this revision is made to comply with policy format requirements and changes in the NHS Pension Scheme.

Archive policies are available in the HR Department.

Employees will be made aware of this revised policy by the usual Trust communication systems and through the induction programme for new employees, including new managers.

8. Training and other resource implications

The Human Resources Department offers training and support to managers in the implementation of Human Resources policies.

9. Audit, monitoring and review

This policy is due to be reviewed at least every 3 years. However, monitoring will be on an ongoing basis pending any amendments which may occur due to revised legislation or release of good practice guidance information from relevant organisations, e.g. ACAS. Overall, HR policies are subject to joint monitoring and review between management and staff side in the Joint Consultative Forum.

Monitoring Compliance Template						
Minimum Requirement	Process for Monitoring	Responsible Individual/ group/committee	Frequency of Monitoring	Review of Results process (e.g. who does this?)	Responsible Individual/group/ committee for action plan development	Responsible Individual/group/ committee for action plan monitoring and implementation
To be reviewed in line with relevant employment legislation changes	Review policy, review employment legislation changes	HR Directorate Partner	At least every 3 years	Joint Consultative Forum / HR Policy Group	HR Directorate Partner	Joint Consultative Forum / HR Policy Group

Review date: September 2021

10. Implementation plan

Action / Task	Responsible Person	Deadline	Progress update
New policy to be uploaded onto the Intranet and Trust website.	Director of Corporate Governance		
A communication will be issued to all staff via the Communication Digest immediately following publication.	Director of Corporate Governance	Within 5 working days of issue	
A communication will be sent to Education, Training and Development to review training provision.	Director of Corporate Governance	Within 5 working days of issue	

11. Links to other policies, standards and legislation (associated documents)

Flexible Working Policy
Retirement Gift and Buffet Procedure Policy
Leaver Guidance

12. Contact details

<i>Title</i>	<i>Name</i>	<i>Phone</i>	<i>Email</i>
Pensions department, Victoria Pay Services	Matthew Ashton	0114 2714407	matthew.ashton@sth.nhs.uk
Victoria Pay Services		0114 3052439	
HR Adviser	Sharon Booth	0114 2716753	sharon.booth@shsc.nhs.uk
HR Department		0114 2263301	

13. References

1998/2008 NHS Pension Scheme Guide for members
2015 NHS Pension Scheme Guide for members

Appendix A – Version Control and Amendment Log

Version No.	Type of Change	Date	Description of change(s)
1.0	New policy	2005	n/a
2.0	Ratification and issue	Feb 2012	Amendments made during consultation, prior to ratification.
3.0	Ratification and issue	Nov 2016	Early review undertaken to update the policy to in order to comply with new format requirements, and to update references, including removal of outdated reference to Pension Choice exercise
4.0	Ratification and issue	TBI	Amendments made during consultation, prior to ratification.

Appendix B – Dissemination Record

Version	Date on website (intranet and internet)	Date of “all SHSC staff” email	Any other promotion/ dissemination (include dates)
1.0	2005	2005	
2.0	Feb 2012	Feb 2012	Pension Choice update information
3.0	Nov 2016	Nov 2016 via Communications Digest	
4.0			

Appendix C – Stage One Equality Impact Assessment Form

Equality Impact Assessment Process for Policies Developed Under the Policy on Policies

Stage 1 – Complete draft policy

Stage 2 – Relevance - Is the policy potentially relevant to equality i.e. will this policy potentially impact on staff, patients or the public? If **NO** – No further action required – please sign and date the following statement. If **YES** – proceed to stage 3

This policy does not impact on staff, patients or the public (insert name and date)

see below

Stage 3 – Policy Screening - Public authorities are legally required to have „due regard“ to eliminating discrimination , advancing equal opportunity and fostering good relations , in relation to people who share certain „protected characteristics“ and those that do not. The following table should be used to consider this and inform changes to the policy (indicate yes/no/ don“t know and note reasons). Please see the SHSC Guidance on equality impact assessment for examples and detailed advice. This is available by logging-on to the Intranet first and then following this link https://www.xct.nhs.uk/widget.php?wdg=wdg_general_info&page=464

	Does any aspect of this policy actually or potentially discriminate against this group?	Can equality of opportunity for this group be improved through this policy or changes to this policy?	Can this policy be amended so that it works to enhance relations between people in this group and people not in this group?
AGE	NO	N/A	N/A
DISABILITY	NO	N/A	N/A
GENDER REASSIGNMENT	NO	N/A	N/A
PREGNANCY AND MATERNITY	NO	N/A	N/A
RACE	NO	N/A	N/A
RELIGION OR BELIEF	NO	N/A	N/A
SEX	NO	N/A	N/A
SEXUAL ORIENTATION	NO	N/A	N/A

Stage 4 – Policy Revision - Make amendments to the policy or identify any remedial action required (action should be noted in the policy implementation plan section)

Please delete as appropriate: no changes made.

Impact Assessment Completed by (insert name and date)

Sharon Booth, HR Adviser (September 2016)

Appendix D - Human Rights Act Assessment Form and Flowchart

You need to be confident that no aspect of this policy breaches a person's Human Rights. You can assume that if a policy is directly based on a law or national policy it will not therefore breach Human Rights.

If the policy or any procedures in the policy, are based on a local decision which impact on individuals, then you will need to make sure their human rights are not breached. To do this, you will need to refer to the more detailed guidance that is available on the SHSC web site

<http://www.justice.gov.uk/downloads/human-rights/act-studyguide.pdf>

(relevant sections numbers are referenced in grey boxes on diagram) and work through the flow chart on the next page.

1. Is your policy based on and in line with the current law (including case law) or policy?

Yes. No further action needed.

No. Work through the flow diagram over the page and then answer questions 2 and 3 below.

2. On completion of flow diagram – is further action needed?

No, no further action needed.

Yes, go to question 3

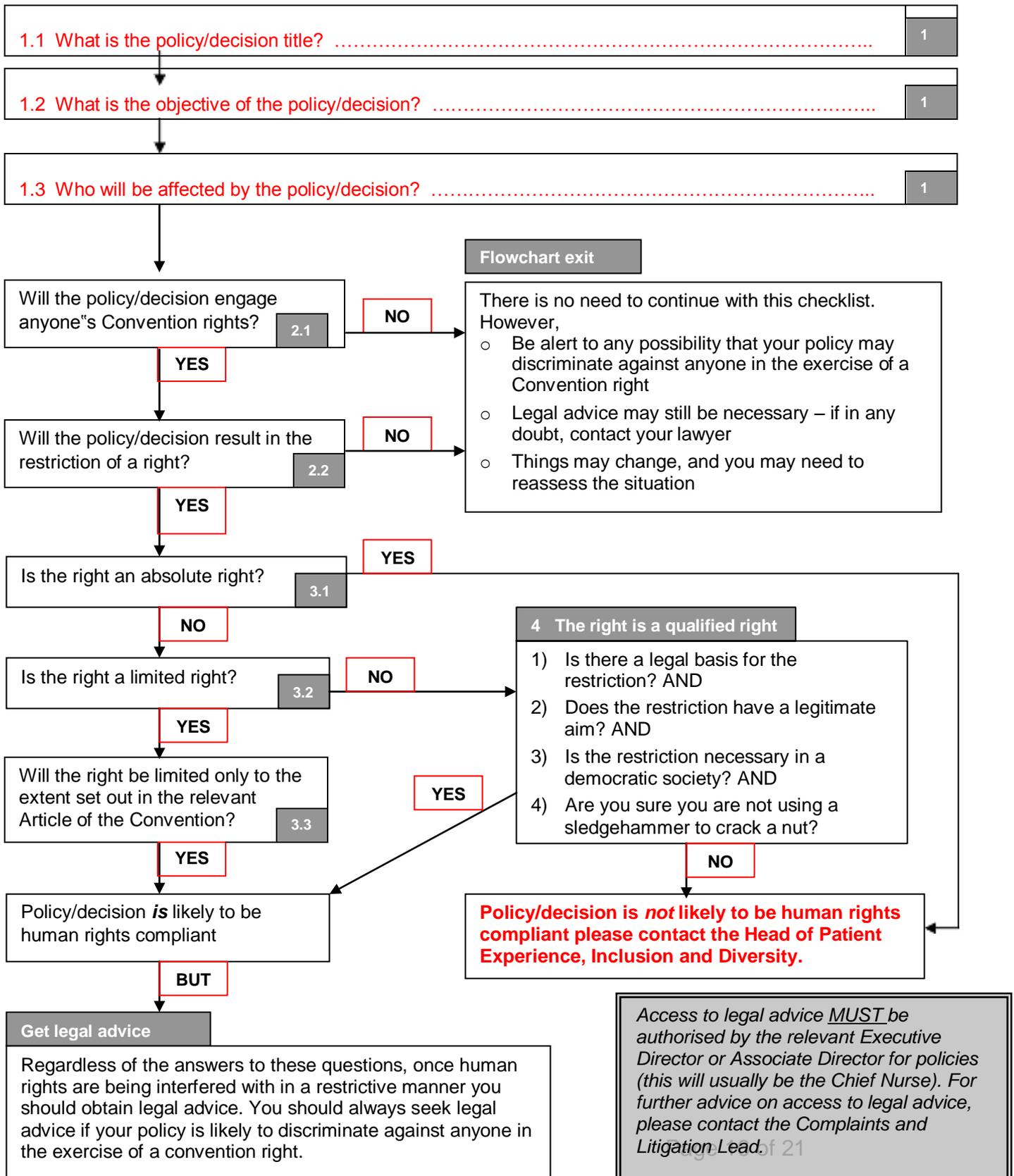
3. Complete the table below to provide details of the actions required

Action required	By what date	Responsible Person

Human Rights Assessment Flow Chart

Complete text answers in boxes 1.1 – 1.3 and highlight your path through the flowchart by filling the YES/NO boxes red (do this by clicking on the YES/NO text boxes and then from the Format menu on the toolbar, choose „Format Text Box“ and choose red from the Fill colour option).

Once the flowchart is completed, return to the previous page to complete the Human Rights Act Assessment Form.



Appendix E – Development, Consultation and Verification

Consultation with staff side March 2017 - some material changes to the content of the document.

Verified by JCF **September 2017**.

Appendix F –Policies Checklist

Please use this as a checklist for policy completion. The style and format of policies should follow the Policy Document Template which can be downloaded on the intranet.

1. Cover sheet

All policies must have a cover sheet which includes:

- The Trust name and logo
- The title of the policy (in large font size as detailed in the template)
- Executive or Associate Director lead for the policy
- The policy author and lead
- The implementation lead (to receive feedback on the implementation)
- Date of initial draft policy
- Date of consultation
- Date of verification
- Date of ratification
- Date of issue
- Ratifying body
- Date for review
- Target audience
- Document type
- Document status
- Keywords
- Policy version and advice on availability and storage

2. Contents page

3. Flowchart

4. Introduction

5. Scope

6. Definitions

7. Purpose

8. Duties

9. Process

10. Dissemination, storage and archiving (control)

11. Training and other resource implications

12. Audit, monitoring and review

This section should describe how the implementation and impact of the policy will be monitored and audited and when it will be reviewed. It should include timescales and frequency of audits. It must include the monitoring template as shown in the policy template (example below).



Monitoring Compliance Template						
Minimum Requirement	Process for Monitoring	Responsible Individual/group/committee	Frequency of Monitoring	Review of Results process (e.g. who does this?)	Responsible Individual/group/committee for action plan development	Responsible Individual/group/committee for action plan monitoring and implementation
A) Describe which aspect this is monitoring?	e.g. Review, audit	e.g. Education & Training Steering Group	e.g. Annual	e.g. Quality Assurance Committee	e.g. Education & Training Steering Group	e.g. Quality Assurance Committee

13. Implementation plan



14. Links to other policies (associated documents)



15. Contact details



16. References



17. Version control and amendment log (Appendix A)



18. Dissemination Record (Appendix B)



19. Equality Impact Assessment Form (Appendix C)



20. Human Rights Act Assessment Checklist (Appendix D)



21. Policy development and consultation process (Appendix E)



22. Policy Checklist (Appendix F)



MEMORANDUM

To: Pensions Department
 Victoria Pay Services
 Coleridge House
 Northern General Hospital
 Herries Road
 Sheffield
 S5 7AU

From:

Assignment No:

Date:

RETIREMENT MEMO
 (To be completed 4 months prior to retirement)

NAME: _____ **DATE OF BIRTH:** _____

I wish to notify you that the above employee will be retiring on _____
 on the grounds of: (please tick)

- | | |
|---|---|
| <p>a. Age <input style="width: 50px; height: 20px;" type="text"/></p> | <p>b. Ill Health <input style="width: 50px; height: 20px;" type="text"/></p> |
| <p>c. Compulsory/Voluntary Compensation
 Redundancy/Retirement
 Re: Senior Managers. Are Whitley Council Sections 45/46
 excluded from contract? YES/NO</p> | <p><input style="width: 50px; height: 30px;" type="text"/></p> |
| <p>d. Early Retirement in the interests and efficiency of the
 service
 (no redundancy pay)</p> | <p><input style="width: 50px; height: 30px;" type="text"/></p> |
| <p>e. Voluntary Early Retirement
 (i.e. with actuarial reductions – no redundancy pay)</p> | <p><input style="width: 50px; height: 20px;" type="text"/></p> |

There will be _____ days annual leave to be paid up at the date of retirement, therefore
 the last day of service will be _____.

If paid notice is due please show relevant dates below:

From..... To

In respect of **(c)** compensation retirement, please complete parts A, B, C and D overleaf.

In respect of **(d)** in the interest and efficiency of the service, please complete parts C & D
 overleaf.

Signed: _____ Date: _____
 Human Resources Officer/ Manager

Tel No: (0114)

Compensation Retirement Cases Only.

A Classification (Tick the appropriate box)

- | | | | | | |
|----------------------|---|--------------------------|----------------------|---|--------------------------|
| (a) Admin & Clerical | 1 | <input type="checkbox"/> | (b) Ambulanceman | 2 | <input type="checkbox"/> |
| (c) Ancillary | 3 | <input type="checkbox"/> | (d) Medical & Dental | 4 | <input type="checkbox"/> |
| (e) Nurse or midwife | 5 | <input type="checkbox"/> | (f) Professional & | 6 | <input type="checkbox"/> |
| (g) Other | 7 | <input type="checkbox"/> | | | <input type="checkbox"/> |

B Reason for Retirement (Tick the appropriate box. If 2 or more reasons apply, tick the highest)

- | | | | |
|---|-------------------------------|---|--------------------------|
| (a) Competitive Tendering | Premature retirement | 1 | <input type="checkbox"/> |
| | Redundancy | 2 | <input type="checkbox"/> |
| (b) Organisational Change | Premature retirement (CPLNHS) | 3 | <input type="checkbox"/> |
| | Premature retirement (Other) | 4 | <input type="checkbox"/> |
| | Redundancy (CPLNHS) | 5 | <input type="checkbox"/> |
| (c) Other closures | Redundancy | 6 | <input type="checkbox"/> |
| (d) Other redundancies
(Include those from
Organisational | | 7 | <input type="checkbox"/> |
| (e) Early retirement in the interests
of the efficiency of the service | | 8 | <input type="checkbox"/> |

Please pass to the Director of Finance for authorisation of Sections C & D

C District/Trust responsible for any Compensation charges _____

D Do you wish to pay by capitalisation? Yes No

If yes, do you propose to pay (i) a single lump sum?
(ii) Annual instalments (inc interest)?

Signed _____

Date _____