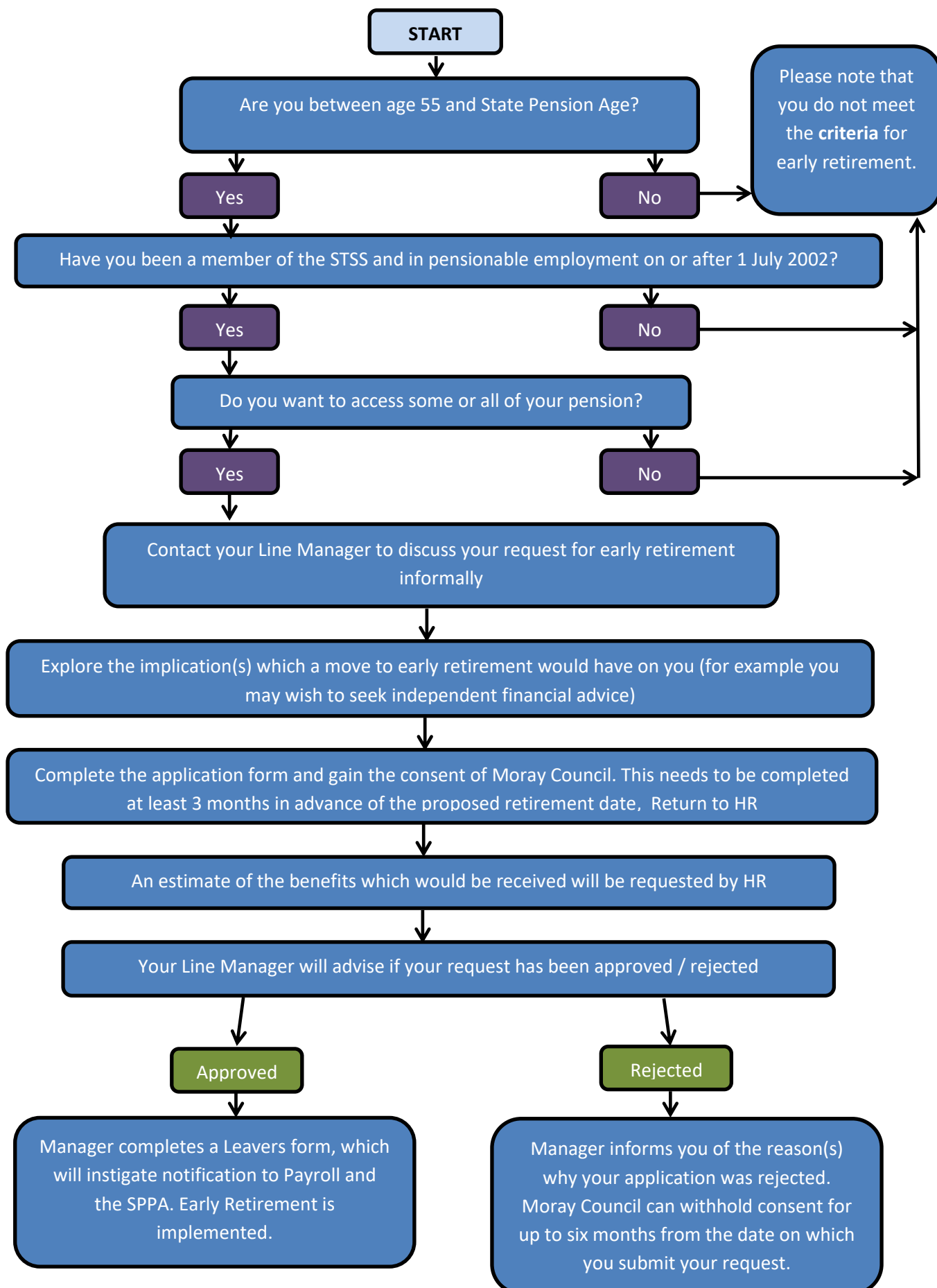


Teaching Early Retirement – Process Overview



Early Retirement – Managers Checklist

Pre-Retirement Discussion

Employees are able to request meeting with the appropriate HT to discuss retirement plans or proposals

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

It may be helpful to signpost employees to the various avenues of support and guidance available, to support them in making a decision on flexible retirement:

- Corporate Event: Planning for the Future
Website: http://interchange.moray.gov.uk/int_standard/Page_116989.html
- Scottish Public Pensions Agency (SPPA) (Teaching staff)
Website: <http://www.sppa.gov.uk/> Tel: (01896) 893000
- Independent financial advice
- Trade Union

Early Retirement application form received

It is the manager's responsibility to identify, collect and record the relevant evidence and information. The manager is expected to make, and be able to justify a robust business decision. To allow a decision to be made, the key actions which should be taken are as follows:

- ✓ Refer to the Flexible & Early Retirement policy and ensure that the employee understands the process.
- ✓ Meet with the employee, this should be used as an opportunity to review the employee's application and to discuss in more detail, agreeing a potential date of retirement.
- ✓ Avoid raising staff expectations when discussing the possibility of Early Retirement and all estimates of possible Early Retirement benefits will only be provided on the clear understanding that it does not constitute a formal offer, nor give any indication as to the outcome of the application.
- ✓ Consult with the appropriate HR Adviser, outline the request.
- ✓ An estimate of the benefits which would be received and the cost to Council will be sought from the Pensions Section.
- ✓ Consult with the appropriate Head of Service and Business Support Team Manager to ensure the proposed decision is supported
- ✓ Due to cost implications the Head of Service and Head of HR, ICT & OD to discuss the application.

Request approved

- ✓ Meet with the employee and discuss the outcome.
- ✓ The decision of the Heads of Service will be final, and will be confirmed by the Head of HR, ICT & OD in writing to the employee, with estimated details of the pension and lump sum approved by the Council.
- ✓ If the employee wishes to proceed with retirement from the agreed date, written confirmation should be sent to the Head of HR, ICT & OD as soon as possible to this effect.
- ✓ Complete a Leavers form on the Employee Portal
(*The submission of an NOA will also instigate notification to Payroll where required*)
- ✓ Notify the appropriate HR Adviser of the decision who will complete a form to notify the SPPA.
- ✓ Keep records and file accordingly.

Request rejected

- ✓ Meet with the employee and discuss the decision, clearly outlining why the request was rejected.
- ✓ Advise that the Council can withhold consent for up to 6 months from the date of application.
- ✓ Explore any other feasible options which are available to the employee (e.g. Flexible Retirement, Flexible Working)
- ✓ Follow the meeting up by [writing out](#) to the employee, formally confirming the decision.
- ✓ File your documentation accordingly

Template – Early Retirement Approved Outcome Letter



Service

Your name

Your job title

Address

Telephone: Enter here

Email: your.email@moray.gov.uk

www.moray.gov.uk

PRIVATE AND CONFIDENTIAL

[Title, initial and last name of employee]

[Address 1]

[Address 2]

[Address 3]

[Postcode]

Date:

Dear [Title and last name of employee]

Early Retirement Application

I am pleased to inform you that your request for Early Retirement received on has been agreed by the Council.

With effect from it has been agreed that you will retire from the Council's employment.

With effect from you will be granted retirement benefits from your Local Government Pension Scheme.

If you have any questions regarding the contents of this letter please do not hesitate to contact me by email on (*insert email*) or telephone (*insert telephone number*).

Yours sincerely

[Name of line manager]

[Job title]

Template – Early Retirement Rejection Outcome Letter



Service

Your name

Your job title

Address

Telephone: Enter here

Email: your.email@moray.gov.uk

www.moray.gov.uk

PRIVATE AND CONFIDENTIAL

[Title, initial and last name of employee]

[Address 1]

[Address 2]

[Address 3]

[Postcode]

Date:

Dear [Title and last name of employee]

Early Retirement Application

Further to our meeting on I regret to inform you that the Council is unable to support your request to be considered for Early Retirement as of your proposed date of The reason for this is as follows:

(Select reason(s) below and provide a rationale behind the decision)

- Burden of additional costs
- Detrimental impact on service delivery
- Inability to re-organise work among staff
- Inability to recruit staff

The Council can withhold consent for up to 6 months from the date of application due to the reason/s above so to this end your new retirement date will be

Yours sincerely

[Name of line manager]

[Job title]