



Flexible Retirement – Managers Checklist

Pre-Retirement Discussion

Employees are able to request a 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

Flexible Retirement application form received

It is the manager's responsibility to identify, collect and record the relevant evidence and information. There is an expectation for the manager to make, and be able to justify a robust business decision. To allow the manager to make a decision, the key actions that should be taken are as follows:

- ✓ Refer to the Flexible & Early Retirement policy and ensure that the employee meets the eligibility criteria.
- ✓ Meet with the employee, this should be used as an opportunity to review the employee's application and to discuss the proposal in more detail.
- ✓ Avoid raising staff expectations when discussing the possibility of Flexible Retirement and all estimates of possible Flexible 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.
- ✓ Establish if it will attract any costs to the council, and liaise with finance and Business Support Team Manager.
- ✓ Collect evidence of costs, savings and benefits of allowing the flexible retirement.
- ✓ Consider the criteria for granting flexible retirement and any associated costs to the Council and liaise with HR and Business Support Team Manager.
- ✓ Consult with anyone else affected by the proposal.

- ✓ Consult with the appropriate Head of Service to ensure the proposed decision is supported
- ✓ Confirm a decision on the application within 28 days of its receipt.

Request approved

- ✓ Meet with the employee and discuss the outcome.
- ✓ Follow the meeting up by [writing out](#) to the employee, formally confirming the decision. Ideally, this should be completed before implementation of the decision.
- ✓ Complete [a Notification of Appointment](#) (NOA) form on the Employee Portal:
 - Clearly mark it as Flexible Retirement
 - Outline the change from/to
 - Specify the expected date of retirement

(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 your records and file accordingly.

Request rejected

- ✓ Meet with the employee and discuss the decision, clearly outlining why the request was rejected.
- ✓ Explore any other feasible options which are available to the employee (e.g. Flexible Working)
- ✓ A further application can be made 12 months after the date of decision (unless there are benefits to the council sooner).
- ✓ Follow the meeting up by [writing out](#) to the employee, formally confirming the decision.
- ✓ File documentation accordingly
- ✓ There is no right of appeal against decisions not to grant flexible retirement.

Template – Flexible 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]

Flexible Retirement Application

I am pleased to inform you that your request for Flexible Retirement received on has been agreed by Business Support Team Manager subject to the conditions outlined below.

With effect from until you will be employed on:

- Grade: Job Role:.....
- Hours:
- With effect from you will be granted retirement benefits from your Local Government Pension Scheme
- With effect from you have indicated that you will retire from the Council's employment.

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 – Flexible 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]

Flexible 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 Flexible Retirement. 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

A further application can be made 12 months after the date of decision.

Please note there is no right of appeal and therefore this decision is final.

Yours sincerely

[Name of line manager]

[Job title]