

PERSONNEL COMMITTEE - TUESDAY, 10 OCTOBER 2023

Report of the Director Finance, Governance and Contracts

Part A

RETIREMENT POLICY AND PROCEDURE

Purpose of Report

Personnel Committee to agree the proposed amendments to the Retirement Policy and Procedure and the introduction of the Retirement Policy Application Form.

Recommendation

That Personnel Committee agree the proposed amendments to the Retirement Policy and Procedure and the introduction of the Retirement Policy Application Form.

Reason

To ensure that information provided to manager and employees in relation to retirement and pensions is up to date and accurate.

Policy Justification and Previous Decisions

The Retirement Policy and Procedure was introduced by the Council on the 24 January 2012. The proposed amendments to the policy have been agreed by SLT and JMTUM to accurately reflect the correct information on retirement for employees.

Implementation Timetable including Future Decisions

The decision will come into effect immediately following agreement at Personnel Committee and be published on the Council's intranet.

Report Implications

Financial Implications

There are no financial implications with this decision.

Risk Management

There are no specific risks associated with this decision.

Equality and Diversity

None identified.

Climate Change and Carbon Impact

None identified.

Crime and Disorder

None identified.

Wards Affected

Not applicable.

Consultations

Not applicable.

Links to the Corporate Strategy

Caring for the Environment	No
Healthy Communities	No
A Thriving Economy	No
Your Council	No

Background Papers:

Retirement Policy and Procedure.

Officer to contact:

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Part B

Background

1. The Retirement Policy and Procedure was last reviewed in 2015, the updated version seeks to clarify any areas of the policy that may have been unclear on the steps that must be taken. The policy was also reviewed to ensure it reflect current legislation around the pensions provisions regarding retirement.
2. To help with the processing of a flexible retirement request, a flexible retirement application form has been introduced as a supporting document.

Current HR Policies or Procedures

3. The current Retirement Policy and Procedure is a total of 26 pages in length. The appendices repeated a lot of the information included within the body text of policy and procedure and therefore the updated version streamlines the current policy.

Key Changes

4. The policy has been amended to include all the different retirement options previously covered while removing any content that was repeated. The revised policy also numerically lists all of the steps that must be followed when processing, examining and approving/refusing a flexible retirement and ill health retirement applications.
 - Flexible retirement application form has been added which will now need to be completed to initiate flexible retirement requests. This will assist managers in review the individuals' circumstances surrounding the request as well as the needs of the service.
 - Flexible retirement and ill health retirement processes is now numbered to assist managers in navigating through the relevant processes.
 - The numerical steps described above for flexible retirement applications clarifies that an FR1 form must be completed if a manager wishes to consider a flexible retirement request and further explains that this will enable pensions to provide pensions estimates to the employee and any associated potential costs to the employer.
 - The 85-year rule was previously covered in the current policy under the heading early payments of LGPS benefits; however, this section has been removed. The 85-year rule is briefly covered in the glossary of terms with the addition of a weblink which takes an employee directly to the LGPS website which covers the rule in more detail. Also, within the glossary employees are advised to contact the pensions department should they have further questions.

Appendices

Appendix A – Retirement Policy and Procedure

Appendix B – Flexible Retirement Application Form

