

## **Process to Request Flexible Retirement**

An employee seeking flexible retirement must make a request by submitting an application form to the Assessor.

A meeting should be held within 28 calendar days of the date on which the application is submitted. If a meeting cannot be held within 28 days, the employee will be notified as to the reason for the delay and an alternative suitable date should be agreed.

The purpose of the meeting is to determine if the request can be approved, in principle. If the application cannot be approved, the employee will be written to with the reason(s) which may include: burden of additional costs; detrimental impact on service delivery to meet customer needs; inability to reorganise work among staff; detrimental impact on quality of service and/or service performance.

The Assessor will forward the employee's Flexible Retirement application form to HR to obtain pension figures.

The implementation date will normally be at least 12 weeks from the date pensions are notified of the request.

The department will be given details of costs implications. Where net savings can be achieved, the employee will be given an estimate of pension benefits and any actuarial costs, within 14 calendar days of the Pensions Section receiving the application form. In the case of a request to reduce grade, the pension section will issue the estimate of benefits where a vacancy at the lower grade exists.

The employee is required to confirm in writing whether they wish to proceed or not with their request, stating their commencement date and resignation date. The employee should seek advice from an independent financial adviser on the financial implications to reduce hours or salary grade. It will be the employee's responsibility for arranging such independent financial advice.

If confirmation is not received from the employee within 21 days following receipt of an estimate of pension benefits and any actuarial cost, the Valuation Joint Board will have no obligation to progress the request.

If the department cannot support the request, the employee will be notified of the reason for the refusal in writing.

Employees have the right of appeal against a decision to refuse a flexible retirement request and if exercising this right should do so in writing to the Office and Support Manager within 10 working days of being notified of the Assessor's decision. The letter should outline the reason for the appeal.

An appeal cannot be based on the actuarial cost incurred by the employee.