

# **SUPPORTING THE WORK-LIFE BALANCE (F) Phased Retiral Policy**

## **1. Introduction**

Greater Glasgow Health Board (NHS Greater Glasgow & Clyde) recognises that the change from work to retirement is one of the most significant events encountered during a person's life. This policy aims to provide the best support and practical information to enable employees to experience as smooth a transition from work to leisure as possible.

This policy applies to all employees of the Board who wish to retire including those employees with Mental Health Officer or special class status.

## **2. Principles**

All employees for whom this policy applies will be given the opportunity to access the benefits detailed in this policy. Employees who wish to continue to work until they are 65 may do so, retiring the day before their 65<sup>th</sup> birthday. It will be the responsibility of the Human Resources to contact all employees 13 months before their 60<sup>th</sup> birthday (55<sup>th</sup> in the cases of special classes) to enquire as to their intentions in regard to retirement. Employees must inform the local Head of Human Resources of the intention to retire and whether they wish a phased retiral. Human Resources will then arrange an individual interview with the member of staff 12 months before the actual date of retiral in order that a "Retiral Plan" may be drawn up. The retiral plan must include agreement between the manager and the employee on how annual leave will be utilised over the final year leading to retirement

## **3. Working Hours Reduction**

In order that an employee can adjust to the prospect of increased leisure hours, a gradual reduction in working hours may be introduced three months prior to retirement, as detailed in the table<sup>1</sup> below:

Third month before retiral - 4 days

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<sup>1</sup> The above table may be adapted for Medical and Dental Staff on a pro rata basis using job planning activity instead of days.

Second month before retiral - 3 days  
Last month before retiral - 2 days

The above will apply on a pro-rata basis to staff on either part-time or job share contracts. During this time employees will receive their normal pay<sup>2</sup>.

#### 4. Preparation for Retirement

Employees will be given the opportunity to attend a pre-retirement course where they will have access to a wide range of information and be given their “retiral pack”. To encourage a long and healthy retiral employees will have access to a health check and advice from the Occupational Health service.

#### 5. Staff Termination/Pensions Application

Pensions applications and notification of termination should be completed 4-6 months before the date of retiral in order to ensure that pensions are paid timeously.

#### 6. Retiral Gift/Presentation

The Board believes it is important that an employee’s service is acknowledged. Therefore line managers must take responsibility for these arrangements. In addition, in acknowledgement of long service at retiral, the Board will provide a gift with a value in relation to service as follows:

With 20 or more years continuous service with the Board but less than 30 years	<b>£100.00</b>
With 30 or more years continuous service with the Board but less than 40 years	<b>£150.00</b>
With 40 or more years continuous service with the Board	<b>£250.00</b>

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<sup>2</sup> Normal pay is the full pay the employee would have received had they worked their standard hours for the period of step down. (It does not include unearned overtime or unearned on-call payments out with standard hours.)

The above definition of normal pay also includes distinction awards and discretionary points for Medical and Dental Staff.

## 7. Monitoring and Review

The application of this Policy will be monitored jointly by the Director of Human Resources and the Area Partnership Forum to ensure equitable treatment of all employees.

The Board is required by Law and under the European Union Employment regulations, to gather monitoring information relating to ethnicity, religion and faith, sexual orientation, age, disability and gender for all aspects of employee relations.

You may be asked for information relating to the above in connection with this policy.

You do not have to give the monitoring information if you do not wish to. However, for some of the above diversity strands it is a legal requirement that we ask you for it, and good practice to ask for monitoring information for all diversity strands.

**Any equalities monitoring information will be held separately and not used to inform any proceedings that occur in relation to this Policy.**

The operation of this Policy will be regularly reviewed by the Area Partnership Forum to ensure its continued effective operation, and formally no later than 30<sup>th</sup> June 2009.