

Wales Council for Voluntary Action

Supporting charities, volunteers and communities

6. Employing and managing people

6.17 Retirement policy



The following is an example of a Retirement policy which is provided for guidance only. It should not be regarded as an authoritative statement of the law and should be adapted to suit your own organisation.

Example policy

1. Introduction and aims of the policy

<Name of organisation> recognises that retirement involves a significant change in an individual's lifestyle and requires planning on the part of the individual.

In line with Age discrimination legislation, <Name of organisation> does not operate a compulsory retirement age. Since 1 October 2011 the statutory default retirement age of 65 no longer applies, therefore, staff are able to continue working if they wish without having to apply to work beyond this age.

The aims of the Retirement policy and retirement procedure are:

- 1 To assist employees who are considering or have taken the decision to retire and outlines the options available and support that can be expected.
- 2 To enable employees to leave <Name of organisation> with dignity and respect.
- 3 To help maintain good workplace relationships with other employees;

2. Retirement

An employee who decides to retire will therefore be required to resign from their post, submitted in writing, providing the notice required in their contract of employment in the normal way.

It is helpful to understand the intention of employees with regards to their future career and retirement plans, as far as it is possible to enable <Name of organisation> to undertake workforce planning and to assist employees in their career planning process. <Name of organisation> will discuss with all employees irrespective of age their short, medium and longer term career aspirations.

We would like employees to engage in open and transparent discussions with their line managers.

It is acknowledged that individual intentions to retire can change due to a variety of personal circumstances and any informal discussions will only be progressed formally once notice to resign has been given.

Options prior to retirement

It is recognised that employees may wish to change their working pattern to suit their individual circumstances. It may therefore be possible to agree a flexible working pattern whether or not this is intended to lead directly towards a full retirement.

Employee wishing to work more flexibly would need to submit a flexible working request.

Poor performance

If an employee is performing poorly the line manager should discuss this with them to establish a cause. Failure to address any poor performance with an employee because there is an expectation they will retire soon may be discriminatory. Line managers should establish a reason for poor performance, setting improvement periods and agreeing what training and development would help the employee meet the business expectation. If levels are not improved and the line manager has followed the <Name of organisation> performance procedure they then may decide to dismiss the employee on capability grounds.

Further Information

ACAS

Tel: 08457 474747

www.acas.org.uk

Age Positive

Tel: 0113 232 4444

www.agepositive.gov.uk

Disclaimer

The information provided in this sheet is intended for guidance only. It is not a substitute for professional advice and we cannot accept any responsibility for loss occasioned as a result of any person acting or refraining from acting upon it.

For further information contact

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