



# THE UNIVERSITY *of* EDINBURGH

## Flexible Retirement Policy

### 1. Policy Statement

The University is committed to helping its employees balance their personal and work commitments. We also recognise that there is mutual benefit in supporting employees who wish to take a phased approach to full retirement. This policy explains how, if eligible, you can request a reduction in your working hours and access a proportion of your University pension benefits.

### 2. Scope

This policy applies to employees aged over 55 who are members of one of the following pension schemes, and have the requisite qualifying service of their scheme:

- Staff Benefits Scheme (SBS)
- Universities Superannuation Scheme (USS)
- Local Government Pension Scheme (LGPS)
- National Health Service Scheme (NHSPS)
- Scottish Teachers Superannuation Scheme (STPS).

Please note that the rules of the Medical Research Council Pension Scheme (MRCPS) do not allow for flexible retirement.

### 3. Eligibility

To take flexible retirement, your hours and salary must reduce by at least 20%. You may submit two flexible retirement requests during your employment. On the third occasion you would have to retire fully and leave the University.

If you are not a member of a pension scheme or you are a member of a scheme that does not offer flexible retirement, you may still be entitled to request a reduction in your hours under the [Flexible Working Policy](#).

#### **4. Principles**

This policy is underpinned by the following principles:

- 4.1 Requests will be considered promptly, fairly and with sensitivity.
- 4.2 Each request will be considered in line with the needs of the business area. (This will include the impact on other staff and service provision.) In some cases this may mean that it will not be possible to agree to a request.

#### **5. Links to Other Relevant Policies and Guidance**

You may find it useful to refer to other relevant University policies and information which you can find on the [HR web pages](#):

- [Flexible Working Policy](#)
- [Pensions](#)

#### **6. Policy History and Review**

Approval Date: April 2019

Approved By: CJCNC

Year of Next Review: 2022

## Flexible Retirement Procedure

### 1. Considering Flexible Retirement

If you are considering flexible retirement you must:

- obtain further information about the pension scheme you belong to and its flexible / phased retirement provisions by visiting the [Retirement page](#) of the Pensions website, and
- check you meet the eligibility criteria of your scheme.

Before taking your request any further, and at least three months before you wish to start your flexible retirement, you must:

- speak to your manager about your proposed plans and seek their support, and
- contact the Pensions Department and request a formal pension quotation on the basis of your proposed reduction in hours, which must be at least 20%.

### 2. Requesting Flexible Retirement

Once you have the information you need and you wish to proceed you must complete the [Flexible Retirement Request form](#) and submit it to your manager. If your manager is satisfied that your request can be met they may agree to it without holding a meeting with you.

If your manager wishes to find out more about your request and how it will affect the needs of your business area, you will be invited to attend a meeting. A meeting will normally take place within two calendar weeks of submitting your request. You may be accompanied by a trade union representative or work colleague if you wish. Your manager may be accompanied by a representative from HR.

A request for flexible retirement may only be declined for one or more of the following reasons:

- the burden of extra costs
- your work can't be reorganised among other staff
- additional staff can't be recruited to do your work

- the quality of your work or performance, or the business area's work or performance will be affected detrimentally
- the business area won't be able to meet customer demand
- a lack of work to do during your proposed working times
- planned structural changes.

### **3. Outcome of Request**

If your manager agrees to your request they will complete the approval section of the [Flexible Retirement Request form](#) and send it to HR. They will also send a copy to you for confirmation.

The form must be submitted to HR at least two months before you wish your flexible retirement to start. Your contractual changes will be confirmed to you in writing by HR.

If your manager does not agree to your request they will notify you in writing within one calendar week of the meeting, giving you the reason.

### **4. Appeal**

If you are not happy with the outcome you may make an appeal in writing to your manager's manager. You must do this within two calendar weeks of being notified, explaining your reasons. An appeal meeting will be arranged either with the manager who received your appeal notification or with a different manager from your business area, who will be at a grade equal or more senior to the manager who dealt with your request originally. You may be accompanied by a trade union representative or work colleague if you wish. The manager hearing your appeal may be accompanied by a representative from HR. The meeting will normally take place within two calendar weeks of submitting your appeal.

You will be notified of the outcome of your appeal within one calendar week of the meeting.