

The background of the slide features a large, light blue watermark of the University of Alberta crest. The crest is a shield divided into four quadrants. The top-left quadrant shows a building, the top-right shows a stag's head with a cross on its forehead, the bottom-left shows a three-masted sailing ship on waves, and the bottom-right shows a beaver. Above the shield is a crown with four floral motifs. Below the shield is a banner with the motto 'ANNE FOR A'.

**Agenda Item 5**

**Referral from Corporate  
Partnership Forum**

Falkirk Council

**Title:** Referral from Corporate Partnership Forum  
**Meeting:** Emergency Executive  
**Date:** 20 August 2020  
**Submitted By:** Director of Corporate & Housing Services

**1. Purpose of Report**

- 1.1 The purpose of this report is to ask the Executive to approve the changes to Casual Employment and Retirement policies which were considered by the Corporate Partnership Forum on 3 July 2020.

**2. Recommendations**

- 2.1 The Executive is asked to approve the immediate implementation of changes to the Casual Employment and Retirement policies.

**3. Background**

- 3.1 The Corporate Partnership Forum considered the Casual Employment and Retirement policies on 3 July 2020 and agreed to refer these to the Executive for approval.

**4. Considerations**

Casual Employment Policy

- 4.1 The policy has been updated to provide clarity on when casual employment should be used and includes a How to Guide on Managing Casual Employment.
- 4.2 The policy also ensures that a Casual Co-ordinator has responsibility for the creation and maintenance of a Casual Employment database within their Service area.

Retirement Policy

- 4.3 The policy has been updated to the new format including creating guidance documents for employees and managers.
- 4.4 The policy gives clearer guidance on the requirements for reduced hours to allow flexible retirement to progress. There is now a requirement to give 6 months notice for flexible retirement.
- 4.5 The policy requires employees who have a pension strain cost to accept an actuarially reduced pension to allow flexible retirement to progress.

4.6 The time period for newly agreed cases has been limited for flexible retirement to 5 years before retirement.

4.7 There is clearer guidance provided to managers on managing applications.

## **5. Consultation**

5.1 Services and Trade Unions have been consulted on the policies and comments considered, with changes made where appropriate. The Corporate Partnership Forum discussed the Casual Employment and Retirement policies and agreed to refer these to Executive for approval.

## **6. Implications**

### **Financial**

6.1 There will be financial implications from the Casual Employment and Retirement policies. There are costs associated with agreeing flexible retirement where strain payments and backfill arrangements are involved although these are reduced by some of the changes. There are also costs associated with appointing casual workers above the normal workforce levels including the associated on costs and holiday pay.

### **Resources**

6.2 There are no additional resource implications for implementing the revised Casual Employment and Retirement policies.

### **Legal**

6.3 There are no legal implications arising from implementation of these revised policies.

### **Risk**

6.4 There are no risks arising from implementing the changes to the Casual Employment and Retirement policies.

### **Equalities**

6.5 An EPIA was carried out for the Retirement Policy and whilst there were some negative impacts on gender and age from the changes to flexible retirement, these are related to pension scheme rules and scheme costs. It should be noted that flexible retirement is a voluntary, mutually agreed option.

### **Sustainability/Environmental Impact**

6.6 There are no sustainability or environmental implications from this report.

## **7. Conclusions**

- 7.1 The Executive is asked to consider and approve the changes within the Casual Employment and Retirement policies for immediate implementation.

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Director of Corporate & Housing Services

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**Date: 16 July 2020**

## **APPENDICES**

Appendix 1 – Casual Employment policy  
Appendix 2 – Retirement Policy

### **List of Background Papers:**

**None**

## Casual Employment Policy

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Falkirk Council aims to recruit and retain high calibre employees. It recognises that casual workers are required to support and maintain effective service provision.

Casual workers enter into a relationship with the Council where they are employed on an as and when required basis to cover absences or specific peaks in workload.

This Policy applies to all casual appointments within the Council with the exception of casual teaching appointments which are covered by the [Short-term Supply/Fixed Term Employment Policy for Teachers](#)

### **Definition**

Work is “casual” where there is no mutuality of obligation. This means that the Council is not obliged to offer work to an individual on the casual list. Equally the individual is not obliged to take work.

### **When to Use Casual Employment**

Casual workers should only be used when cover cannot be provided using existing employees to maintain Service provision. Casual employment may be used as an alternative to overtime working.

# Casual Employment Policy

Casual workers should not be employed for continuous periods of employment of 8 weeks or more. For further details, see [How to Manage Casual Employment](#).

Managers are responsible for ensuring that periods of casual work are reviewed on an 8 week cycle.

## **Financial Control**

Services must agree with their Service Accountant, at the start of each financial year, the estimated cost of casual workers over the coming year. Managers need to ensure that they have sufficient budget for any casual appointment.

## **Appointing Casual Workers**

Casual workers will be recruited through the recruitment and selection process and will be subject to normal pre-employment checks. For further details, see [How to Manage Casual Employment](#)

Applicants for casual posts will be responsible for all fees relating to criminal conviction checks. For further details, see [Criminal Convictions Checking Policy](#).

## **Using Casual Workers**

Service managers who use casual workers will be responsible for appointing a Casual Co-ordinator with responsibility for the creation and maintenance of a [Casual Employment database](#) within their Service area. This should be secure and accessible by relevant managers. Allocation of shifts/available hours should be made, where appropriate, on a rotational basis. In exceptional circumstances, however, a worker may be specifically selected to provide a period of cover because specific skills are required or to maintain continuity of care.

The casual employment database must be reviewed by the Casual Co-ordinator on an annual basis. At this review stage, previous work patterns should be checked. If any casual worker listed has not worked for the Council within the previous 6 month period, they should be automatically removed from the casual list. If an individual has lived overseas for a period of 3 months or more relevant checks as per the [Criminal Convictions Checking Policy](#), must be undertaken

## **Terms and Conditions**

- Casual workers will normally be placed on the minimum spinal column point (SCP) of the grade of the post being covered. Overtime does not apply to casual workers. Periods of employment will be paid through the submission of an authorised time sheet.
- Workers required to travel to and from places of work as part of their duties must complete the normal authorisation to drive process and should use pool

## Casual Employment Policy

cars, where available, in the first instance. Where they do not have access to a pool car and use their own vehicle or public transport, they will be reimbursed in accordance with the Council's car allowance rate or relevant public transport costs subject to the provision of relevant receipts.

- The individual(s) considered most appropriate for a period of employment will be contacted to confirm availability during the period required. There is no obligation for any individual to accept any offer of casual employment.
- Annual leave will accrue against working time in accordance with the Working Time Directive to a maximum of 28 days pro-rata per annum. Payment will be made, on a monthly basis, for accrued annual leave based on casual hours worked in the previous month. This additional payment will be automatically calculated and will be displayed separately on payslips.
- Casual workers are eligible to opt into Falkirk Council's Pension Scheme.
- Casual workers should receive appropriate induction and training to avoid unnecessary service delivery failures or risks arising e.g. first use vehicle check training where they may be required to drive a Council vehicle.

# How to Manage Casual Employment

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## Assessing Appropriateness Of Casual Employment

Casual workers should only be used when cover cannot be provided using existing employees to maintain Service provision. Casual employment may be used as an alternative to overtime working.

Casual workers should not be employed for continuous periods of employment of **8 weeks or more**. This includes different periods of continuous employment for more than one purpose or at more than one location. Continuous employment is only broken by a break in service of 7 complete days (running Sunday to Saturday).

Casual workers may accrue differing employment rights depending on their length of continuous service. It is not appropriate to employ a casual worker for a period of 8 weeks, break their employment for a week and recommence the casual employment thereafter. Breaks such as sick leave (if entitled to SSP) or annual leave (in

## **How to Manage Casual Employment**

accordance with the Working Time Directive) may be regarded as temporary cessations of work and may not break continuity of service.

Where you know, at the start of a period of cover required, that the vacancy is likely to be for 8 weeks or more, consideration should be given to filling the vacancy on a temporary basis in line with the Council's [Temporary Employment Policy](#).

### **Appointing Casual Workers**

Casual workers must be recruited in line with the Council's [Recruitment and Selection Policy](#) and will be subject to appropriate employment checks, e.g. interview, references and pre-employment health screening and where appropriate a Disclosure/PVG check ( see [How to Carry Out Recruitment Checks](#)).

The preferred candidate at interview should be issued with a 'recommendation for inclusion on casual list' letter via the Staffing and Recruitment Team pending successful pre-employment checks. Applicants for casual posts will be responsible for all fees relating to criminal conviction checks. A mandate, agreeing to Payroll deductions, must be signed by any applicant in advance of their application being submitted to Disclosure Scotland. They should not commence any periods of employment with the Council until such checks are completed.

Once the recruitment process is complete, the Casual Co-ordinator for your service area should complete a New Appointment form via HR Forms Plus and add the worker to the [Casual Employment Database](#). The completion of a new appointment form will allow a statement to be sent by the Staffing & Recruitment Team to the casual worker confirming their inclusion on the casual list and the relevant conditions associated with being offered casual work.

Any periods of employment will be paid through the submission of an [authorised time sheet](#). Managers engaging a casual worker for a period of employment should ensure that they receive or have previously undertaken appropriate induction and training. This will help avoid unnecessary service delivery failures or risks arising e.g. first use vehicle check training where they may be required to drive a Council vehicle.

### **Using Casual Employment**

You should normally allocate shifts/available hours to appropriately qualified workers on your service casual employment database on a rotational basis. In exceptional circumstances, you may specifically select a worker to provide a period of cover because, for example, they have specific skills or to maintain continuity of care.

You should contact the selected casual worker to confirm their availability during the period required. There is no obligation for any individual to accept any offer of casual employment.

## How to Manage Casual Employment

It is important that you check that the individual concerned continues to hold relevant registration where this is required, e.g., SSSC registration before the commencement of any period of employment.

### Maintaining Casual Database

Where a service area requires to use casual employment to maintain service delivery, the Service Manager should nominate someone as a Casual Co-ordinator. They will be responsible for the creation and maintenance of a casual employment database. This database should be secure with only appropriate managers able to access it directly in order to arrange cover as required.

The Casual Co-ordinator will be responsible for organising any recruitment to the casual list and will review the casual employment database on an annual basis. They are responsible for writing to casual workers on an annual basis to establish their availability for work during the next 12 months. A [template letter](#) is available.

At this review stage, previous work patterns should be checked. If any casual worker listed has not worked for the Council within the previous 6 month period, the casual co-ordinator should arrange for them to be removed from the casual list and a termination form completed via HR Forms Plus. If an individual has lived overseas for a period of 3 months or more relevant, the Casual Co-ordinator should carry out checks, where relevant, as per the [Criminal Convictions Checking Policy](#).

The database must be kept up to date with the relevant details by the Service, with managers inputting periods of employment worked.

### Terminating Casual Employment

- **Where Casual work is no longer available**

You should confirm with the worker that casual cover is no longer required and confirm whether or not they wish to be contacted for future work should it arise. You should update the casual employment database to reflect this.

- **Where casual status has been terminated**

Where a casual worker has not undertaken a period of employment with the Council in the previous 6 months period, the Casual Co-ordinator should remove them from the database.

In all other circumstances, unless removal is requested by the individual, the Casual Co-ordinator or relevant manager must contact Human Resources before removing a casual worker from the casual database. Human

## **How to Manage Casual Employment**

Resources will be able to provide advice regarding continuity of employment and the appropriate procedure to follow.

The Casual Co-ordinator should complete a Termination Form or Employee Leaving Post Form through HR Forms Plus where a worker is to be removed from the casual employment database and confirm this in writing

Where a casual worker is transferred to a temporary post, the Casual Co-ordinator must complete an appointment form through HR Forms Plus confirming the period of temporary appointment. Where appropriate/practicable, normal recruitment and selection procedures should be applied. When the need for temporary cover ceases, a Termination Form/ Employee Leaving Post form must be completed confirming that the worker has transferred back to casual status noting that their continuous service has come to an end.

## RENEWAL LETTER

## APPENDIX E

Dear

I write to enquire whether or not you wish to remain on the list of potential workers who are prepared to undertake (designation) duties on a casual as and when required basis with effect from 1 April ..... until 31 March ..... Here are the details which would apply to any period of employment offered to you:

**Job Title:** Click here to enter text.

**Team/Division/Service:** Click here to enter text.

Choose an item.

**Work Location:** You may work at any of the Council's workplace locations relevant to the post.

**Post ID:** Click here to enter text.

**Post Grade:** Click here to enter text.

**Hourly pay:** £

***Optional statement:** If your basic hourly rate is below the living wage, you'll be given a top-up to take your salary to £9.07 per hour. We review the living wage rate regularly and can change or remove it at any time.*

**Appointment Status:** Casual

We may contact you if any period of appropriate employment becomes available, however please be aware that we do not have to offer any employment and equally, you do not have to accept any offer

Under Working Time regulations, you will accrue annual leave entitlement against any time worked. This will be calculated as a percentage of hours claimed and displayed separately on your payslip. You are not entitled to notice, paid sick leave (other than Statutory Sick Pay where applicable) or public holidays.

Please complete a timesheet for each period worked and submit this to your Manager for authorisation. A supply of timesheets is available from your Manager. You will be paid directly into your bank account through BACs on a monthly basis and your pay will be subject to appropriate National Insurance and Income Tax deductions.

*Note:*

- *Where PVG or Disclosure is required and the individual has lived abroad for a period of 3 months or more, insert the following text:* If you have lived abroad for a period of 3 months or more within the past year, you must notify your manager. *Where this is the case, continued inclusion on this list is subject to satisfactory overseas criminal records checks.*
- *Where PVG Membership is required, insert the following text:* You must maintain a PVG scheme membership while in this post as it is exempt from the provisions of The Rehabilitation of Offenders Act 1974. If you

don't maintain this registration, you may be dismissed. Your PVG membership number will be held in your personal file.

You must conform to Service requirements in relation to Code of Conduct, Drug and Alcohol Policy, Smoking at Work Policy, Driving at Work Policy, Equal Opportunities Policy and Health and Safety (& any other Specified Service Rules e.g. confidentiality, data protection). No other conditions of employment will apply.

Please confirm whether you wish to continue to be included on the list of potential workers by signing the enclosed copy of this letter and returning it to <NAME>.

As you are aware, the list of casual workers is subject to annual review. If you have not undertaken a period of casual employment with the Council in the previous 6 month period, you will be automatically removed from the casual employment list.

May I take this opportunity to wish you every success if you are required to work within Falkirk Council.

**Service Director/ Head of Service**

I confirm that I wish my continued inclusion on the list of potential casual workers on the conditions outlined above.

Signed ..... Date  
.....



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# **Retirement Policy (Non Teaching Employees)**

Our retirement policy assists employees approaching retirement age by explaining the options available. This applies to all employees except those covered by the Scottish Negotiating Committee for Teachers and other associated professionals conditions who have a separate policy.

## **Retirement date**

There is no longer a default retirement age but there are relevant dates you should be aware of before making any decisions about your retirement.

## **State Pension Age (SPA)**

The SPA is currently between 65 and 68. You can find out when you will reach your SPA at [www.direct.gov.uk](http://www.direct.gov.uk)

## **Local Government Pension Scheme (LGPS) Members**

If you are a member of the LGPS, the normal age at which you receive your pension is your SPA. There are options to retire from age 55 with a reduced pension, to retire flexibly, or to accumulate membership rights in the scheme until 2 days before your 75<sup>th</sup> birthday. Some of these options have specific criteria or need employer approval.

## **Retirement options & criteria**

### **Non LGPS Member**

If you are not in the LGPS pension scheme, you can choose to retire at any time. No pension benefits are payable by the Council.

If you wish to apply to reduce your hours you should apply using the Flexible Working Policy.

### **LGPS Member - SPA**

You can choose to retire on your SPA in which case unreduced LGPS pension benefits will be payable.

### **LGPS Member - Age 55+**

You can choose to retire and take your pension from the LGPS at any time between age 55 to 75, as long as you have 2 years active membership in the pension scheme and were making pension contributions on or after 1 June 2018. If you choose to take your pension before your state pension age it will normally be reduced, as it's being paid out early (before normal retirement age). The amount of your reduction depends on how early you take the benefits. The reduction is based on the length of time (in years and days) between the date your benefits are paid and the normal retirement age for that part of your scheme membership. There are some exceptions and you should contact the Pensions team for advice. The general rule is that the earlier you retire, the greater the reduction.

This option does not require any approval from Falkirk Council.

## **Retirement Policy (Non Teaching Employees)**

You can find out more information at <http://www.falkirkpensionfund.org/client-area/news/new-age-55-retirement-option/> or speak to the Pensions team.

### **Opting Out**

If you opt out of the scheme, your retirement benefits cannot be paid out until you leave the employment which you earned your benefits in.

### **Continue to work**

You can continue to work in your current post for as long as you wish, provided you are able to perform the duties of your post to the required standards.

### **Delaying your pension payments**

If you take your LGPS pension later than your normal retirement age, it's increased because it's being paid later. You can choose to take your pension before you are 75 but if you choose not to; your pension will be automatically paid when you reach 75. More information about this is available from the Pensions team.

### **Flexible Retirement**

The flexible retirement rules of LGPS mean that, in certain circumstances, it is possible for you to receive some or all of your retirement benefits and to continue working. If you wish to apply to reduce your hours without accessing your pension benefits you should apply using the Flexible Working Policy.

You must:

- be aged 55 or over
- reduce your hours or grade enough to meet the needs of the LGPS
- have approval from the Council for your revised working arrangements
- not be financially better off as a result of flexible retirement

If there is a strain cost to release your pension, you will need to accept an actuarially reduced pension (ARP) to allow your pension benefits to be released. Flexible retirement can be for a maximum of 5 years, after which you must retire.

If your flexible retirement application is approved, you will stay in the scheme and build up a new set of pension rights for your revised working arrangements unless you choose not to. Any additional benefits built up will be payable when you retire fully.

You can find out how to apply for any retirement options at [\\*How to apply for a retirement option\\*](#)

## **Retirement Policy (Non Teaching Employees)**

### **Re-employment with Falkirk Council**

Whilst flexible retirement will enable us to retain the skills and knowledge of experienced employees, if you have retired, and a cost has been incurred by Falkirk Council or Falkirk Community Trust, you cannot be re-employed by Falkirk Council or Falkirk Community Trust. This includes casual and consultancy work.

In specific circumstances and to meet service requirements, Service Directors in consultation with the Head of People, Technology and Transformation may authorise a short term arrangement. This must be time limited, normally for a maximum of 3 months and only with permission from the Chief Executive can this be extended. This may not be repeated in the same calendar year and in general Service Directors should not re-engage the same ex employee regularly.

### **Roles and Responsibilities**

#### **Employee responsibility**

You have a responsibility to ensure that you have the relevant information to assist you in making a decision about your retirement options. Information is available from [www.direct.gov.uk](http://www.direct.gov.uk), the employee internet, your manager, Human Resources, Pensions <http://www.falkirkpensionfund.org/> and Trade Unions. You may also wish to consider specialist independent financial advice although this may have a cost.

The normal notice periods for any resignation apply when you are retiring but you should be aware of the timescales required to release pension funds where applicable (4 – 6 weeks).

If you wish to request flexible retirement, you are responsible for making sure that the correct application form is completed and submitted in time. A late application could mean a delay in any agreement to flexible retirement. If the flexible retirement start date is less than 6 months from the date of receipt, a member of the HR Helpdesk will contact your manager and ask them to discuss a revised date with you. This is to allow time for the calculations to be completed and to provide time for you to consider the offer along with providing time for the new arrangements to be put in place.

#### **Manager responsibility**

On receipt of your retirement resignation, your manager will complete a termination form through HR Forms Plus and submit this to Payroll. Your manager will write to you confirming relevant dates and other details such as annual leave entitlement and salary sacrifice details.

If you are a LGPS member, your manager will also send an e-mail confirming the last day of your contractual service (the date of retirement) to [pensions@falkirk.gov.uk](mailto:pensions@falkirk.gov.uk)

Managers will assess any flexible retirement requests you submit in line with the guidance and ensure requests are processed within the required timescales. They will also complete a termination form through HR Forms Plus for your agreed retirement date and submit this to Payroll. More information for managers is available at **\*How to process a flexible retirement application\***

## How to apply for a retirement option (non teaching)

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### How to tell us you are retiring

#### **Non LGPS Member**

If you decide to retire and are not a member of the LGPS, you should complete the and submit this to your manager. Your manager will complete a termination form on HR Forms.

#### **Member of LGPS – Early & normal retirement or retirement after your State Pension Age (SPA)**

If you are a member of the LGPS and wish to retire voluntarily at or after age 55, you should complete the **retirement notification form** and submit this to your manager. Your manager will complete a termination form on HR Forms and e-mail [pensions@falkirk.gov.uk](mailto:pensions@falkirk.gov.uk) to confirm the last day of your contractual service. You may wish to email or phone the Pensions team ([pensions@falkirk.gov.uk](mailto:pensions@falkirk.gov.uk) or 01324 506329) to confirm your date of retirement. Pensions will then contact you to arrange the payment of benefits, although it should be noted that such benefits cannot be calculated and paid until the Pensions team have details of both your leaving date and final pensionable pay.

## How to apply for a retirement option (non teaching)

The normal notice periods for any resignation are applicable. Payment of pension benefits is expected to be made within 4 – 6 weeks of the Pensions team receiving the relevant forms. If you retire before your SPA, your pensions may be reduced.

### Continue working

No notification is required if you decide to continue to work beyond your SPA.

### Member of LGPS – Flexible retirement

If you are considering flexible retirement you should seek advice from the Pensions team, complete the [flexible retirement application form](#) and send it to the HR Helpdesk. The application should be submitted 6 months before you want your flexible working to start to allow time for your application to be assessed. There is no automatic right to flexible retirement.

You must reduce your hours by 40% or reduce your grade to allow flexible retirement to be considered. If there is a strain cost to release your pension, you will need to accept an actuarially reduced pension (ARP) to allow your pension benefits to be released. You may wish to seek advice from the Pensions Team.

You can retire flexibly for up to 5 years. You will need to retire 5 years after you start your flexible retirement. You can retire any time within this 5 year period by resigning giving your contractual notice.

Your service will have to consider whether the change in working arrangements and any costs associated with the early payment of pension benefits can be accommodated. In all cases there must be savings equivalent to a minimum of 25% of your salary, net of costs, from approving the application, over a 5 year period.

The Chief Finance Officer, in conjunction with the Head of People, Technology & Transformation and your Service, will consider all relevant factors including costs, savings and changes to your contract of employment, and your flexible retirement will only be approved where there is an identified business benefit and cost saving.

You should be informed in writing of the outcome 1 month before the requested start date of your new working pattern. You have the right to request a review of this decision through the grievance appeal process and reference is made to this within the letter explaining the decision.

Before letting you know if your application is refused, your manager will have contacted Human Resources to ensure that the test of objective justification is met before any discussion with you.

If you have Additional Voluntary Contributions (AVC's) then you should contact the Pensions team to discuss this.

### Recruitment checks

If you apply for flexible retirement and remain in your own post on a part time basis, you will not require any recruitment checks.

## **How to apply for a retirement option (non teaching)**

Where you move to a different post, the recruitment checks in our Recruitment and Selection policy will apply. You should contact Human Resources if you have any questions about this.

# How to process an application for flexible retirement



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### **Processing applications for flexible retirement**

An online system is used to log and process applications. Costs will be provided to relevant managers through this system.

Once an application is submitted, an alert will be issued to the manager to review the application. The manager must, as soon as possible after receipt of the alert, decide whether to progress or reject the application to allow costings to be undertaken.

Once the Payroll and Pensions teams have provided the necessary financial information, the manager will receive an alert once the costs are available. This process can take several weeks/months due to the nature of the information required.

Once costs have been received, a decision on the outcome should be made as soon as possible by the manager and within 1 month. Managers must prepare a comprehensive assessment of service delivery implications, including the replacement strategy and financial implications using the online system.

Managers need to consider the following factors:

- Whether the employee has requested to reduce their hours by 40% or has requested to move to a lower graded post
- Whether the remaining hours in the post are to be backfilled and the costs associated with this or how the service will be delivered with the reduction in hours
- Whether this helps with succession planning

## How to process an application for flexible retirement

- In all cases there must be savings equivalent to a minimum of 25% of the employees salary, net of costs, from approving the application, over a 5 year period

Managers should be aware that if there is a strain cost to release the employees pension, the service will not pay this and the employee will need to accept an actuarially reduced pension (ARP) to allow their pension benefits to be released.

In all situations, the line manager should discuss the request with the employee at least 3 months before the requested start date. After this, the manager has to decide whether the proposal can be accommodated and progressed or rejected and update the system.

### Approved applications

Whilst the manager can agree to progress an application, formal approval is required by:

- Service Accountant
- Service Director
- Head of People, Technology & Transformation
- Chief Finance Officer

Once final approval has been given the HR Helpdesk will issue the employee with a proposal letter. If accepted by the employee, the Staffing & Recruitment team will send a contractual change letter to the employee and will complete the notification of change form or new appointment form to change the employees hours or post as agreed.

### Rejected applications

Managers have the right to refuse the flexible retirement application where the employee does not meet the LGPS criteria or where the requested work pattern cannot be accommodated due to service needs or due to the costs associated with backfilling the post.

If the request cannot be accommodated, the HR Helpdesk will issue the employee with a regret letter. The employee must be informed in writing of the rejection of the application 1 month before the requested implementation date of their new working pattern.

# Non Teaching Flexible Retirement Application Form

This form must be sent to the HR Helpdesk, Municipal Buildings at least 6 months before the date you wish your new working arrangement to take place to allow time for your application to be considered. You should speak to your manager to let them know you have sent this form.

Name:	Employee Number:
Service:	Job Title:
Manager's Name:	Manager's Location:

I would like to take my pension benefits and continue in employment and apply to work under the following arrangement: (Please tick one box only)

<input type="checkbox"/>	Flexible Retirement – within 5 years of start of flexible retirement
<input type="checkbox"/>	Flexible retirement – retire 5 years after start of flexible retirement

Please note: you must retire 5 years after you start your flexible retirement.

### Describe your current working pattern

Hours per week:
Working Pattern:

### Describe your requested working pattern – you must reduce your hours by 40% or reduce your grade

Do you want to stay in your current post?	Yes	No
Do you wish to move to a lower graded post?	Yes	No
If you wish to change jobs, please provide details of the post/grade you wish to move to:		
Hours per week:		
Working Pattern:		

### EMPLOYEE CONFIRMATION

- I consider myself to be of reasonable health and fitness to carry out the duties of the post and will attend any medical examination or health related meetings required for the post
- I will provide a minimum of 4 weeks notice before the start date of my flexible retirement arrangements in writing to my Service Manager if I wish to withdraw the arrangements that have been agreed.

I would like to start this working option from (minimum of 6 months notice):	
My retirement date is (not more than 5 years after pattern starts):	

I confirm I will retire within 5 years of my flexible retirement start date if my application is agreed.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please send your completed form to **HR Helpdesk, Room 325, Municipal Buildings, Falkirk, FK1 5RS**. You will receive an acknowledgment letter once your application has been received.

#### Privacy Statement

- The Council processes your information in accordance with data protection legislation.
- We use this to assess your application for flexible retirement and keep it for the duration of your employment plus 7 years (or 25 years if you are in a post that requires PVG membership).
- We also use this for monitoring and recording purposes
- You can find full details here [www.falkirk.gov.uk/privacy](http://www.falkirk.gov.uk/privacy)