



## Policy on Retirement

The normal retirement date for employees of the Institute of Education is 31 August following the day on which they reach the age of 65. However, employees can choose to retire early from the age of 60 onwards. Where an employee wishes to retire early, she/he is required to give notice according to the terms of her/his contract.

Under the Employment Equality (Age) Regulations 2006, employees have the right to request to continue working beyond any compulsory retirement age imposed by their employer, either on an indefinite basis, for a defined period, or until a specified date. In considering a request from an individual to continue working beyond her/his contractual retirement age, the Institute will seek to balance the wishes of the individual with the needs of the Institute.

Employees should inform their Dean of Faculty/Head of Support Department as early as possible what their wishes are in relation to retirement. This will help the Institute with its succession planning and assist employees who wish to continue working beyond their contractual retirement age, as it will give management more time to consider the possible options.

### **Procedure for making a request to continue working beyond retirement age for staff**

**Note:** The procedure applies to staff who are over 65 and are employed on a fixed term contract as well as to staff who are approaching 65.

Employees will be informed in writing by Human Resources of their intended date of retirement and given details of their right to request to continue working beyond this date\*. This notification will be copied to the employee's Dean of Faculty/Head of Support Department. Employees will be provided with this information at least six months and no more than twelve months before their intended date of retirement.

\* However, the employee will not be informed in writing if she/he has already been considered under this procedure and her/his appointment has been extended for six months or less.

Employees who wish to submit a request to continue working should do so in writing, on the form provided, more than three months, but not more than six months, before the retirement date notified to them by

Human Resources. The employee should specify whether the request is to continue working indefinitely, for a defined limited period, or until a specified date. The request should be submitted to the employee's Dean of Faculty/Head of Support Department and copied to Human Resources.

Once the request has been received, the employee will be invited to attend a meeting with the Dean of Faculty/Head of Support Department and a nominee of the Director to discuss her/his request not to retire on the intended date of retirement. This meeting will normally take place within one month of the receipt of the request. A decision will be made following the meeting, taking into account the employee's representations and the general needs of the Institute. Where the Dean of Faculty/Head of Support Department does not feel able to approve a request, she/he should discuss the request, including the reasons for not agreeing to it, with Human Resources before informing the employee.

The outcome of the request will be communicated to the employee in writing by the Dean of Faculty/Head of Support Department, copied to Human Resources, as soon as it is reasonably practicable to do so after the meeting. Where a request is not approved, details on how to appeal will be included in the letter.

Employees will be given the opportunity to appeal against a decision not to grant their request to continue working. The appeal should be made in writing to the Head of Human Resources within one month of the date of the letter informing the employee that the request has not been approved and should set out the grounds of the appeal.

If an appeal is received, the employee will be invited to attend an appeal meeting with either the Director or the Director of Administration or their nominee to discuss her/his request not to retire on the intended date of retirement. The Dean of Faculty/Head of Support Department will also be present at the appeal meeting, which will normally be held within one month of the date of receipt of the appeal. The outcome of the appeal will be communicated to the employee in writing as soon as it is reasonably practicable to do so after the meeting. The Institute's decision at this time will be final.

Employees have the right to be accompanied by a work colleague at the meeting to discuss their request not to retire on the intended date of retirement and at any subsequent appeal meeting. The work colleague can address the meeting, but not answer questions on behalf of the employee, and will be permitted to confer with the employee during the meeting. Employees can request to postpone the meeting or appeal meeting if their chosen companion is unable to attend on the original date and time suggested. The meeting can be postponed until a date that is within seven days from the day after the original meeting was scheduled to take place.

## **Planning for retirement**

Pre-retirement training at no cost to the employee is available. Details of this training are available from Human Resources.

## **Pension rights on retirement**

Employees who are members of USS or SAUL and who have decided to retire on a specific date may request details of their pension entitlement from Finance.

Both USS and SAUL allow employees to take a pension at any time after the age of 60.

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