

Retirement Policy

Policy Code:	HR7
Policy Start Date:	September 2025
Policy Review Date:	September 2028

Please read this policy in conjunction with the policies listed below:

- F4 Discretionary Policy
- HR8A Equal Opportunities and Diversity (Staff) Policy
- HR11 Teachers Pay Policy
- HR25 Flexible Working Policy

1 Policy Statement

- 1.1 The Priory Federation of Academies Trust's policy is that staff may continue working until they give notice that they wish to retire. The Trust has no contractual retirement age. The Trust acknowledges that retirement should be a matter of choice for individuals and will not pressurise staff into resigning because they have reached or are approaching a certain age.
- 1.2 The Trust is proud to employ people of all ages, it considers that age diversity is beneficial to the Trust and is committed to not discriminating against staff because of age and adhere to the principles set out in the Trust's HR8A Equal Opportunities and Diversity (Staff) Policy.
- 1.3 References to the Trust or Academy within this policy specifically include all primary, secondary and special academies within the Trust, as well as the Early Years setting at the Priory Witham Academy, Priory Apprenticeships and Lincolnshire ITT.
- 1.4 This policy does not form part of any member of staff's contract of employment and it may be amended at any time.

2 Roles, Responsibilities and Implementation

- 2.1 The Pay, Performance and HR Committee has overall responsibility for the effective operation of this policy and for ensuring compliance with the relevant statutory framework. This committee delegates day-to-day responsibility for operating the policy and ensuring its maintenance and review to the Head of Human Resources.
- 2.2 Leaders and Managers have a specific responsibility to ensure the fair application of this policy and all staff are responsible for supporting colleagues and ensuring its success.

3 Aims

- 3.1 To ensure a fair and equitable approach to the retirement of the Trust's staff and to provide a uniform and equitable approach to the management of retirement.

4 General Principles

- 4.1 Staff who wish to retire from their employment are required to resign and give notice of their intended date of retirement to the Academy Headteacher or the Head of Human Resources in writing. The length of notice must not be less than their contractual notice period.

- 4.2 Staff are encouraged, where known, to give an early indication of their planned retirement date as this will assist the Trust in ensuring appropriate succession plans are in place. There is no obligation for the Trust or the member of staff to hold workplace discussions about their future plans, but it may be mutually beneficial to do so on an informal basis.
- 4.3 Employment or promotion prospects will not be prejudiced because a member of staff expresses an interest in retiring or changing work patterns.
- 4.4 If a member of staff indicates that they are thinking of retiring, they are free to change their mind at any time until they have actually given notice to terminate their employment.
- 4.5 If a member of staff expresses an interest in moving to a more flexible working pattern or changing role, the Trust will confirm that this is what they want before any action is taken which could affect their employment, such as a change to their role or responsibilities. Alternatively, the member of staff may wish to make a request to change their working arrangements under the Trust's HR25 Flexible Working Policy.
- 4.6 The Trust will consider requests for flexible retirement on a case-by-case basis in line with the Trust's F4 Discretionary Policy.
- 4.7 In certain circumstances, and subject to scheme rules, the Trust may be able to agree ill-health retirement. Staff who wish to be considered should contact their Human Resources Business Partner (HRBP).
- 4.8 When staff can start drawing from their pension will depend on the pension scheme rules. Details of pension options and entitlements can be obtained directly from the relevant pension provider.
- 4.9 Staff are strongly advised to consider their pension arrangements and seek independent financial advice before making any decisions in relation to retirement.

5 Phased retirement

- 5.1 We recognise that some staff may wish to phase their retirement by requesting a change to their working pattern.
- 5.2 If staff wish to discuss the option of phased retirement, they should contact the Human Resources Department. Any request to change a

working pattern must be made in line with the Trust's HR25 Flexible Working Policy, and will be considered on a case-by-case basis.

6 Procedure

- 6.1 Once a member of staff has decided that they wish to retire, they should inform their Academy Headteacher or the Head of Human Resources in writing of their intended retirement resignation date, in accordance with their contractual notice period.
- 6.2 The Trust will write to the member of staff, acknowledging receipt of their notice of retirement resignation letter.
- 6.3 The Academy Headteacher will inform the Human Resources Business Partner, and if applicable, will meet with the member of staff to discuss arrangements for leaving, including the intended leaving date, succession and handover plans, pension details and flexible retirement.
- 6.4 Once a leaving date has been agreed, the Trust will write to the member of staff confirming their last day of employment, and the normal arrangements for leaving the Trust will apply.

7 Policy Change

- 7.1 This policy may only be amended or withdrawn by The Priory Federation of Academies Trust.

The Priory Federation of Academies Trust Retirement Policy

This Policy has been approved by the Priory Federation of Academies' Pay, Performance and HR Committee:

Signed..... Name..... Date:

Trustee

Signed..... Name..... Date:

Chief Executive Officer

Signed..... Name..... Date:

Trusts Member of Staff

Please note that a signed copy of this agreement is available via Human Resources.