

## LT2 Retirement Policy – No Fixed Retirement Age

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<b>Policy Level (Trust/School)</b>	Trust	
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## Our Learning Today Leading Tomorrow Multi-Academy Trust Vision

### Vision

Our vision is to build a group of outstanding schools across phases, including specialist provision, to become (a mid-size) Trust that provides vibrant and inclusive learning environments in which every member of the learning community is passionate about learning. The Trust is led by a CEO who works closely with Headteachers who lead the two schools supported by a central team to support finance, HR, estates and governance.

### Mission

LT2 Trust and schools will have a relentless focus on high achievement, supported by robust organisational structures and governance. We aim to give children and young people in our care the knowledge, skills and experiences to expand their minds and world view to enable them to develop a naturally inquisitive approach to learning and life, fit for an ever-changing world.

Ultimately, we will educate and support all children attending LT2 schools to grow into capable and contributing citizens who have developed the personal attributes and characteristics that will enable them to become considerate, self-reliant and confident young people who are ready for the next stage of their lives.

### Values

The Trust Values underpin the mission and provide the basis on which LT2 schools can articulate the key behavioural characteristics that promote a positive philosophy. Our six values are unseen drivers of our behaviour as experienced by others and are designed to create a shared organisational culture:

**Kindness** – The quality of friendliness, generosity, and consideration

**Collaboration** – The belief that working and learning with others will lead to greater success

**Curiosity** – A strong desire to know and to learn

**Resilience** – The ability to recover quickly and learn from the difficulties we face

**Respect** – To appreciate the importance of understanding and admiration for others and self

**Endeavour** – The belief that hard work is needed to achieve something of which we can be proud

### Definitions

- Where the word 'Trust' is used in this document it refers to The Learning Today Leading Tomorrow Trust.
- Where the words 'Trust Board' are used it refers to the board of Trustees who set the vision for the Trust and hold the executive leadership team to account for delivering the Trust's strategic plan.

## 1. Organisation and Responsibilities

### 1.1 Introduction

This policy applies to employees of the Trust only. It does not form part of any employee's terms and conditions of employment with the Trust and is not intended to have contractual effect. The Trust may amend this policy from time to time and will notify employees of any changes to this policy within one month of the date on which the change takes effect.

This policy aims to create a framework for workplace discussions, enabling employees to express their preferences and expectations with regard to retirement and enabling the Trust to plan for educational and pastoral continuity for its pupils.

### 1.2 Legislation

Following the abolition of the Default Retirement Age in 2011, there is no specific legislation regarding retirement. This policy is written in adherence to the Equality Act 2010.

### 1.3 Guidance under this Policy

The Trust HR team is responsible for providing advice and guidance under this policy and reviewing and updating the policy as required.

### 1.4 Board of Trustees

**The Board of Trustees, as a corporate body, has the responsibility to set the strategic direction and objectives of all matters across the Trust.**

The Board of Trustees is responsible for ensuring that high standards of corporate governance are maintained

The Chair of the Trust is responsible for managing the CEO, Trustees and Governors under this policy.

### 1.5 The Chief Executive Officer (CEO)

The CEO of Learning Today Leading Tomorrow Trust (LT2):

- Takes overall responsibility for the implementation of policies and procedures
- Must provide reports as appropriate to Trustees in relation to this policy
- Ensure that sufficient resources are allocated and authorised within the organisations budget to meet statutory procedures and standards across the Trust
- Is responsible for managing the Headteachers and centrally appointed staff under this policy

### 1.6 Headteachers

Headteachers of LT2 schools are responsible for:

- The implementation of and compliance with this policy within their school ensuring competence in those staff who are responsible for and involved in the operation of this policy and associated guidance

- Identifying training needs
- Communicating this policy to all relevant people within the school
- Managing school-based teaching and associate staff under this policy

### 1.7 Senior and Middle Leaders (and other Supervisory Roles)

Although the Headteacher is responsible overall for the implementation of this policy in their school, managers have some specific responsibilities:

- Applying this policy within their own department and area of work
- Resolving any issues members of staff refer to them, informing the Headteacher of any issues to which they cannot achieve a satisfactory solution with the resources available to them
- Where required, conduct formal meetings, undertake relevant training in relation to this policy and ensure effective and competent operation of this policy

### 1.8 Other Employee Duties

All employees have a responsibility to:

- Comply with this policy and to co-operate with the schools' leadership and management on all matters relating to it
- Undertake any training recommended by their line manager

### 1.9 Related Policies and Procedures

- Sickness Absence Policy
- Capability Policy
- Disciplinary Policy
- Flexible Working Policy

### 1.10 Review

This policy will be reviewed every three years.

These procedures have been agreed by the Board of Trustees, who will approve them whenever reviewed.

## 2. Policy on Retirement

The Trust has no fixed retirement age. The Trust acknowledges that retirement is a matter of choice for individuals and will not pressurise employees into retiring because they have reached or are approaching a certain age.

Employees are free to retire whenever they choose, and the Trust is proud to employ people of all ages as it considers that age diversity is beneficial to the organisation. The Trust is committed to not discriminating against employees because of age and adheres to the principles set out in the Equal Opportunities and Diversity Policy.

The Trust actively supports retaining talented teachers beyond their state pension age if they wish to continue teaching and Headteachers should consider all flexible working requests in line with our flexible working policy to facilitate this where possible.

Employee's employment or promotion prospects will not be prejudiced because they have expressed an interest in retiring or changing work patterns.

The Trust will not make generalised assumptions that performance will decline with age, whether due to competence or health issues. If the Trust thinks there are problems concerning an employee's performance or ill-health, these will be dealt with in the usual way, through the Sickness Absence Policy, Disciplinary, or Capability Policy.

### 3. Retirement Plans

#### 3.1 Discussing your Future Plans

To ensure we can provide the best continuity of education for our pupils; line managers are expected to have regular informal conversations with their reports regarding their future plans. Employees are under no obligation to provide any details on their future plans, including retirement, beyond the required notice period. However, additional notice, where possible, would be in the best interest of our students.

Any information provided is not binding, and the employee is welcome to change their mind about retirement at any time, up until they have given formal notice of retirement.

We advise all employees to seek pension advice from a regulated pension advisor before making any decisions on retirement.

The Line Manager may want to meet with the employee to discuss your short, medium and long-term plans, as the need arises. For example, a promotion opportunity may arise, or, if the employee's circumstances change, the employee may wish to explore a different working pattern or to stop work altogether. The Trust needs to plan for its organisational, educational, pastoral needs and requirements, and may indicate to staff from time to time that it would be helpful to know what their plans are. There is no obligation for the Trust or the employee to hold workplace discussions about employees' future plans, but it may be mutually beneficial to do so.

The Trust will not make generalised assumptions that performance will decline with age, whether due to competence or health issues. If the Trust thinks there are problems concerning an employee's performance or ill-health, these will be dealt with in the usual way, through the Sickness Absence Policy, Capability Policy and Performance Management Frameworks which are available on the school's staff network.

##### 2.1.1 Trust responsibilities

If a workplace discussion takes place the Trust will aim to make it as informal as possible.

During any workplace discussion:

The Trust will not assume that an employee wants to retire just because they are approaching a certain age, such as state pension age; and

The Trust will not make discriminatory comments, suggesting that the employee should move on due to age.

If the employee indicates that they are thinking of retiring, they are free to change their mind at any time until such time as the employee has actually given notice to terminate their employment.

Employee's employment or promotion prospects will not be prejudiced because they have expressed an interest in retiring or changing work patterns.

#### 3.2 Giving Notice of Retirement

If an employee decides to retire, the Trust would appreciate as much notice as possible, although the employee should give the Trust at least the notice they are obliged to give under their contract of employment.

Once an employee informs us of their intention to retire the line manager or Headteacher will write to the employee to invite them to attend a meeting to discuss any queries or questions that they may have in relation to their retirement and to plan any necessary arrangements. Arrangements may have to be made to ensure a smooth handover of the role and responsibilities, whilst certain financial arrangements may also need to be discussed on final pay and pensions.

Following the meeting, the Trust will write to the employee to formally accept the notice of their intention to retire and to confirm the date on which employment will end.



## Employee form to provide notification of their wish to retire

<b>DECLARATION</b>	
<p>Please accept this as notification of my personal choice to retire.</p> <p>I understand that my Line Manager may arrange to meet with me to discuss this notification and that the Trust is under no obligation to agree to any request I make to change my working hours. I understand that any change in hours will be for a maximum of three months before my retirement date.</p>	
<b>PERSONAL INFORMATION</b>	
Employee Name:	
Employee Number:	
Job Title:	
Department:	
<b>DATE OF RETIREMENT</b>	
I wish my retirement to take effect from:	
I wish to take all/some of my remaining annual leave directly before my retirement date:	
The amount of annual leave I wish to take directly before my retirement date is:	
The last day that I will attend work is therefore:	
My remaining annual leave amount will be:	
<b>AMENDMENT TO WORKING HOURS</b>	
<p>I would like to amend my working hours in readiness for my retirement to:</p>	

Signature:	
Date:	