

Leavers Framework Element 2: Retirement Policy

1 Introduction

This Policy is part of the Leavers Framework which is made up of a number of elements which together encompass all formal policy, procedure and statement documents, including associated forms, relating to Leavers Form in Abertay University.

If you would like this document in a different format (e.g. large print, braille) or need any assistance to access or understand the policy/procedure please contact your School/Service designated HR Partner.

2 Purpose and Scope

This policy applies to all employees.

The Leavers Framework is made up of a number of elements which together encompass all formal policy, procedure and statement documents, including associated forms, relating to members of staff leaving the employment of Abertay University (the "University"), this includes:

- Element 1 Leavers Procedures
- Element 2 Retirement Policy
- Element 3 Redundancy Procedure

If you have difficulty at any stage of this Leavers Framework because of a disability and/or because English is not your first language, you should discuss your situation with the School/Service designated HR Partner as soon as possible.

3. Retirement Policy

The University is committed to equal opportunities for all its employees and recognises the benefits of a diverse workforce, including the skills, knowledge and experience older employees contribute to the business of the University, to the broader staff community and to the learning journey of our students. The University acknowledges that employees should, wherever possible, be able to continue working past the previous default retirement age of 65 years and have a greater voluntary option to identifying a time to retire.

3.1 Procedure

3.1.1 Workplace Discussions

The University acknowledges that employees are not obliged to or simply may not wish to discuss their retirement plans or subsequent formal notice of retirement. However, discussion on such matters is encouraged in order to enable a structured and supportive approach by the University for the benefit of the individual employee and for the University and/or the School/Service from which they are retiring in respect of workforce planning, etc.

Any such discussion(s) about possible retirement will not result in the University making any assumptions about the employee's commitment.

With this in mind, the performance management process of the University (PATHWAYS) may be utilised by a line manager and employee to discuss a variety of matters over and above performance and development/training needs, including:

- The University's and employee's future plans and expectations in the short-medium-long term;

If a potential retirement is identified, then the following issues may be discussed:

- Potential support available to the employee for planning and preparing for retirement;

- Identification of structure and content of a hand-over period for a senior role or specialist role;

- Reasonable time off work (with the prior approval of the line manager) to seek advice and guidance from external organisations in relation to retirement and/or future opportunities.

- Available information, advice and/or guidance, including:

- From the Occupational Health Advisor on health and wellbeing issues

- From Human Resources on employment-related issues

- Individual pension information and/or financial information

... Local Government Pension Scheme (<http://www.dundee.gov.uk/pensions/>)

... Scottish Teachers' Superannuation Scheme (<http://www.sppa.gov.uk/>)

Please note that in order for pension administration to be processed for the end of employment, the Scottish Teachers' Superannuation Scheme normally require 3 months' notice of a retirement date.

... Discounted independent financial advice, available from Thornton's Solicitors as part of the available University staff benefits.

3.1.2 Notice

Any employee wishing to retire from employment with the University should submit their formal notice in writing to their Head of School/Service, with a copy to the Head of Human Resources.

This notification follows the basic process as when an employee is resigning from the University, and so the appropriate notice period as outlined in their specific terms and conditions of employment, should be noted. Required notice periods are generally as outlined below, unless otherwise stated in the individual terms and conditions of the employees contract of employment.

Category of Staff	Notice Required*
Grade 1-6	1 month
Grade 7 and above	2 months
Academic	3 months
Senior Management Group	3-6 months

Leadership Group	6-9 months
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