

Report to: Employment Committee

Date: 24 March 2020

Title: Flexible Retirement Policy

Report of: Assistant Director of HR and Transformation

Ward(s): All

Purpose of report: To align the policies of Lewes District and Eastbourne Borough Council regarding flexible retirement.

Officer recommendation(s): To approve the new Medical Redeployment Policy.

Reasons for recommendations: To ensure that the Councils have a consistent approach to this scheme which permits employees in the Local Government Pension Scheme (LGPS) to choose to retire anytime from age 55 to 75 and draw their pension.

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1 Introduction

1.1 Lewes District and Eastbourne Borough Councils have jointly committed to bringing policies and procedures together as part of the Joint Transformation Programme (JTP) which is an important step towards aligning our people and business practices.

2 Report

2.1 A review of the existing policies regarding medical redeployment across Lewes and Eastbourne has been undertaken and a new policy developed.

2.2 This revised policy will be implemented by publication on the Council intranet known as 'The Hub' following approval with communication and training issued to managers and staff.

2.3 Unison has been consulted on the new policy and did not have any comments.

3 Financial appraisal

3.1 The implementation of this revised policy should have no financial impact. Any employees making an application for flexible retirement are advised that if they choose to take their pension before their normal pension age it that it may be

reduced, as it's being paid earlier. They are also given an estimate of the forecast pension and advised to take independent financial advice.

3.2 The Council are advised by the pension scheme of the costs an application may present to us and we have an Early Termination of Employment (Discretionary Compensation) Policy already in place.

3.3 This policy does not necessitate any immediate changes to the Councils Medium Term Financial Plans. Flexible retirements that take place are assessed for their financial viability before being approved and any additional cost of exercising any discretion under this policy will be considered on a case by case basis.

3.4 In the current financial climate, the introduction of this policy is intended to be cost neutral as agreement to flexible retirement will only be given when confirmation is received from the Council's LGPS administrators that no cost will fall to the council. It is possible that the business case for agreeing flexible retirement could enable a review of resourcing requirements within service areas/teams and achieve potential budget savings. At this stage it is impossible to predict take up and quantify potential savings.

4 Legal Implications

4.1 On the basis that the Flexible Retirement Policy under consideration merely aligns, simplifies and clarifies the individual policies held by Lewes District Council and Eastbourne Borough Council, and represents no significant change, there are no legal implications arising directly from this report.

Lawyer consulted 31.01.20 Legal Ref: 008930-JOINT-OD

5 Risk Management Implications

5.1 The Risk Management Implications questionnaire has been completed, and this report is exempt from the requirement because it is a progress report.

6 Equality Analysis

6.1 Equality analysis is attached as an appendix to this report.

7 Appendices

Appendix 1 - Eastbourne Borough Council and Lewes District Flexible Retirement Policy

Appendix 2 - Equality and Fairness Analysis on Flexible Retirement Policy

8 Background papers

None