



The  
**St Gregory the Great**  
Catholic Academy Trust

*'Where love exists, it does great things'*

# Policy

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## Flexible Retirement

**Reviewed and approved by: Trust Board**

**Approval date: Autumn Term 2023**

**Review due: Autumn Term 2025**

**Version: 1.0**

# The St Gregory the Great Catholic Academy Trust

## Flexible Retirement Policy

Within the St Gregory the Great Catholic Academy Trust, our academies are communities where our children and young people are given a clear vision for life, a vision which is rooted in the person and teachings of Jesus Christ and which is faithful to the mission of the Catholic Church.

### **Commitment to equality:**

We are committed to providing a positive working environment which is free from prejudice and unlawful discrimination and any form of harassment, bullying or victimisation. We have developed a number of key policies to ensure that the principles of Catholic Social Teaching in relation to human dignity and dignity in work become embedded into every aspect of school life and these policies are reviewed regularly in this regard.

**THIS POLICY DOES NOT CREATE CONTRACTUAL OBLIGATIONS ON THE ACADEMY TRUST**

## 1. Policy Statement

The St Gregory the Great Catholic Academy Trust (The Trust) is committed to the principles of equality and wishes to have a fair, transparent and sustainable pay structure

The Trust recognises the legal obligations it has as an employer and is committed to the principle of equal opportunities for all employees and workers, regardless of sex, race, religion or belief, age, marriage and civil partnership, pregnancy and maternity, sexual orientation, gender reassignment, or disability.

The Trust will operate this policy on the basis that requests are made on a voluntary basis through individual application.

## 2. Equalities

The Trust is committed to:

- Promoting equality and diversity in its policies, procedures and guidelines
- Ensuring staff are protected from unlawful direct or indirect discrimination resulting from a protected characteristic (e.g. age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation).
- Delivering high quality teaching that meets the diverse needs of its student population and its workforce, ensuring that no individual or group is disadvantaged.

## 3. What is Flexible Retirement

In accordance with regulation 30(6) of the 2013 Local Government Pension Regulations, flexible retirement is where an employee over the age of 55 (57 from 6 April 2028), has the right to request to change the nature and intensity of their work and receive all or part of their accrued pension benefits whilst continuing in employment and building up further benefits in the scheme.

The underlying principle of flexible retirement is to ease the employee into retirement through either working less hours or receiving less pay. This reduction should equate to a minimum of 40% reduction in hours or a reduction to grade and should be maintained for the period of the flexible retirement. Any less will only be considered in exceptional circumstances. This reduction will be for the duration of the revised current contract and cannot subsequently be increased.

The changes proposed to facilitate a flexible retirement must meet the needs of the school/Trust and is therefore at the discretion of the Headteacher or Trust Senior Executive Leadership. Although the employee has the right to request a change in their working hours or role in order to facilitate flexible retirement there is no obligation to grant it.

There is no automatic entitlement to flexible retirement, and where there is a cost to the Trust, it is unlikely that the request would be approved unless there is a clear business reason for doing so, an employee's pension will be subject to an actuarial reduction if they are flexibly retiring before their normal pension age (NPA).

The Trust will operate this policy on the basis that requests are made on a voluntary basis through individual application.

#### **4. Eligibility**

Applications will be considered from individual employees who are:

- aged over 55 (57 from 6 April 2028) years of age;
- in permanent employment at the date of request; and
- members of the West Yorkshire Pension Fund (WYPF) or the Teacher's Pension Scheme.

Flexible retirement applications must contain a request to permanently reduce either the grade and/or hours worked by the employee concerned.

Where a reduction of hours worked is requested this should be at least 40% of current working hours.

Where a reduction in grade is requested, this should be a move to an existing vacant post in the staffing structure, unless in exceptional circumstances where the creation of a new role would be of clear benefit to the school/Trust. Any new role non-teaching is subject to job evaluation to ensure the correct grade for the post is applied

## **5. Conditions for Flexible Retirement**

The request to apply for Flexible Retirement must be made by the employee who should initially put the request and proposed reduction in hours in writing to their Headteacher or line manager.

The request will be considered by the Headteacher, who should take advice from the Trust Head of Human Resources.

There is no automatic entitlement to flexible retirement, requests that lead to additional costs to the Trust will not normally be approved. Applications from employees aged below 60 years could result in costs to the Trust.

Headteachers need to take account of higher potential employment costs or recruitment costs/difficulties associated with alternative options for service delivery in approving a request for flexible retirement.

'Significant' reductions are defined as those by which budget savings, or 'vacated' hours/position would enable the recruitment of a suitable replacement to maintain service delivery. It would be anticipated such reductions would be in the region of at least 40% of hours so that alternative resourcing options can be explored.

Any new post identified for redeployment at a lower grade must be a vacant post within the staffing structure, and one that has been evaluated in accordance with the Trust's Job Evaluation Scheme to ensure the correct grade for the post is applied.

## **6. Managers**

Requests from school staff (other than Headteachers) will be managed by the Headteacher.

Requests from other staff will be managed by the Trust Senior Executive Lead.

## **7. Appeal Managers**

Appeals from school staff will be managed by the Trust Senior Executive Lead

Appeals from other staff will be managed by the Chair of the Trust Finance and Resources committee.

## **8. Timescales**

Applications will normally be considered and a response provided by the manager within 28 days of receipt of the request.

Any appeals against a decision not to support a request by the manager would need to be put in writing to within 10 day working days of the decision being confirmed.

The decision of the Chief Executive Officer is final; there is no right of appeal against a decision beyond this point.

## **9. Employee Considerations**

Employees considering an application for Flexible Retirement are advised to seek individual personal information from the WYPF and/or the Teacher's Pension Scheme.

A statement of benefits will outline the level of reduction to the employee's superannuation benefits where these are taken earlier than anticipated in accordance with actuarial assessment tables.

Conditions of service in any new post will be those applicable to the level appropriate to the new post. Previous entitlements earned through length of service such as leave entitlements and eligibility to full sick pay conditions will be protected as if no break in service following Flexible Retirement but pro-rated based on the hours worked or the grade of the post.

## **10. Procedure for Consideration of a Flexible Retirement Request**

- The employee should meet with the relevant manager (Headteacher or Trust Senior Executive Lead) to discuss the request and provide clarity about the change requested.
- The employee makes a formal request in writing to the Headteacher or Trust Senior Executive Lead.
- The manager considers whether the request is operationally viable; can the manager needs to consider whether the changes proposed can be implemented taking into account the impact on service delivery.
- If operationally viable the manager must consider whether the request is financially viable, by requesting pension cost information via the Trust Head of Human Resources. If there is cost associated with the flexible retirement it is unlikely that it would be approved unless there is a clear business reason for doing so. In

determining if there is a real business reason for agreeing to the request, the manager needs to consider the cost of the pension strain (if applicable) and seek approval from the Trust Chief Finance Officer.

- The Manager will then need to confirm the decision in writing to the employee stating the right of appeal if the request is refused.
- Should the employee wish to appeal the decision they should outline their appeal in writing to the Trust Senior Executive Lead, or Chair of the Trust Finance and Resources Committee.
- After considering the appeal the Trust Senior Executive Lead or Chair of the Trust Finance and Resources Committee. will confirm the decision in writing.
- The decision of the Trust Senior Executive Lead or Chair of the Trust Finance and Resources Committee is final; there is no right of appeal against a decision beyond this point.

## **11. Review**

This policy will be reviewed in Autumn Term 2026, or earlier if any changes to pension scheme eligibility or legislation affecting the policy are made.



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**All policies are written in line with our Trust Mission Statement:**

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**St Gregory the Great Catholic Academy Trust** is a charity and a company limited by guarantee.

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