

Flexible Retirement

Flexible Retirement Application Form

Harlow Council understands that your privacy is important to you. The details you provide on this form will be treated as private and confidential.

Information Note

Flexible Retirement allows you to draw your pension benefits while continuing in your employment with the council. Applicants must be at least 55 years of age, with 2 or more years of pension scheme membership and reduce either the hours they work or their grade. Please note that drawing your pension early may result in a reduction of pension benefits.

Applications for flexible retirement require the consent of EMT. If you request a reduction in hours, it will help the council reach a decision if you provide information on your preferred working pattern. When completing the Business Case section, think about the effect this change will have both on the work that you do and on your colleagues. If your request is granted, this will be a permanent change to your terms and conditions.

Please read the Council's Retirement Policy before completing this form. You should ensure that you submit your application to your line manager at least 3 months before the date you wish the request to take effect. It is important that you complete all the questions to avoid a delay in the process.

Full Name (PRINT):	<input type="text"/>	Payroll No	<input type="text"/>
Service	<input type="text"/>	Line Manager Name	<input type="text"/>
Department	<input type="text"/>		

Eligibility and Conditions of Application

Please tick ☒ to confirm or provide details where appropriate.

I wish to apply for flexible retirement ☐ I am 55 years of age or over ☐

I have 2 or more year of pension scheme membership ☐

I understand that if approved, I am required to reduce my hours by a minimum of 25% or reduce my grade by at least one grade. ☐

I understand that flexible retirement involves the early payment of my pension benefits which may, in full or part, be subject to actuarial reduction ☐

I understand that flexible retirement will constitute a permanent contractual adjustment until my final retirement date. ☐

I understand all flexible retirements are considered by EMT in the light of service delivery needs and the Council's overall aims and objectives. ☐

Option 1

I wish to apply for flexible retirement and reduce my contractual working hours of work by a minimum of 25%. ☐

My current contractual hours of are per week

My proposed contractual hours are per week

DAYS	HOURS	TIMES WORKED
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

Option 2

I wish to apply for flexible retirement based on a reduction in my salary grade* and maintaining my current working hours. I understand if approved I need to successfully secure via a recruitment process an alternative position, at least one grade beneath my current contractual grade. ☐

***Reduction in salary grade** - This may emerge as part of a service restructuring or through application for another job in the Council.

You will have to seek prior approval for flexible retirement. You should identify during application stage that you wish to apply for the (lower graded) position as part of a flexible retirement request.

Commencement

I am providing a minimum of 3 months' notice and request my flexible retirement takes effect from (state date)

Business Case – Employee

For flexible retirement to be granted by EMT it should be mutually beneficial to both the employee and the council. Please detail below how you think your request for flexible retirement would be mutually beneficial to both you and the council.

Other relevant information

If applicable, please include detail of any welfare or wellbeing issues that are pertinent to your request

Confirmation of Application request

Employee Signature:

Date:

Once complete pass this form to your line manager along with any supporting documentation

Please complete either Option 1 or Option 2

Employee:

Please detail below how you think your request for flexible retirement would be mutually beneficial to both you and the council. How you think your request for flexible retirement will impact on the council, if granted and how that impact could be dealt with. Consider the cost, impact of any proposed new work pattern on the Service, ability for Service to continue to perform, staff resources etc

Line Manager: Name

Business case for initial consideration by the Assistant Director of Service setting out the savings to be achieved, as appropriate, should the request be granted and providing details of how work will be reallocated within the department/team.

Strain Payment: Essex Pension estimate (from HR) £.....

Line manager: Signature:

Director: Name

Business case:

Director: Signature:

To be submitted to Natasha Terrell - Director HR and OD
prior to submission to EMT

Natasha Terrel: Signature:

Human Resources to submit to EMT for inclusion on their Agenda