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Author / Title: Autumn Whalley / Workforce Assistant		Responsibility: Workforce & Organisational Development	
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Review dates may alter if any significant changes are made		Review Date: 01/09/2020	
Which Principles of the NHS Constitution Apply? Please list from principles 1-7 which apply 1, 3, 7 Principles		Which Staff Pledges of the NHS Constitution Apply? Please list from staff pledges 1-7 which apply 1, 2, 3, 4 Staff Pledges	
Does this document meet the requirements of the Equality Act 2010 in relation to Race, Religion and Belief, Age, Disability, Gender, Sexual Orientation, Gender Identity, Pregnancy & Maternity, Marriage and Civil Partnership, Carers, Human Rights and Social Economic Deprivation discrimination? Yes			
Document for Public Display: Yes			
Reference Check Completed by...J Phizacklea.....Date.....18/09/2017.... To be completed by Library and Knowledge Services Staff			

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BEHAVIOURAL STANDARDS FRAMEWORK

To help create a great place to work and a great place to be cared for, it is essential that our Trust policies, procedures and processes support our values and behaviours. This document, when used effectively, can help promote a workplace culture that values the contribution of everyone, shows support for staff as well as patients, recognises and celebrates the diversity of our staff, shows respect for everyone and ensures all our actions contribute to safe care and a safe working environment - all of which are principles of our Behavioural Standards Framework.

Behavioural Standards Framework – Expectations ‘at a glance’

Introduce yourself with #hello my name is... 	Value the contribution of everyone	Share learning with others
Be friendly and welcoming	Team working across all areas	Recognise diversity and celebrate this
Respect shown to everyone	Seek out and act on feedback	Ensure all our actions contribute to safe care and a safe working environment
Put patients at the centre of all we do	Be open and honest	For those who supervise / manage teams: ensure consistency and fairness in your approach
Show support to both staff and patients	Communicate effectively: listen to others and seek clarity when needed	Be proud of the role you do and how this contributes to patient care

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1. SUMMARY

- 1.1 The University Hospitals of Morecambe Bay (the Trust) strives to be “a great place to be cared for; a great place to work” and an organisation which provides quality, compassionate care and supports its staff.
- 1.2 These guidelines recognise that employees may encounter matters needing support and guidance throughout their Retirement Process and the Trust wishes to support staff and managers throughout this.

2 PURPOSE

These guidelines are intended to:

- Provide guidance to managers and staff regarding the range of options available to help plan for retirement. It is recommended that, this guideline is read in conjunction with the Principles of the NHS Pension Schemes which may be eligible to you can be found at <https://www.nhsbsa.nhs.uk/nhs-pensions> seeking specialist advice from an independent financial adviser where required
- Assist staff to obtain a work-life balance at a time where their priorities in life are changing
- Enable the Trust to retain staff's knowledge, skills and experience
- Provide a checklist to use when considering an application for retire and return.

They should be read in conjunction with the Trust's **Work Life Balance Policy (see section 6)**.

3 SCOPE

This guideline offers a number of options to consider when looking at retirement which include:

- Wind Down
- Step Down
- Retire and Return

This guideline applies to all employees of the University Hospitals of Morecambe Bay NHS Foundation Trust.

4 GUIDELINE

4.1 Planning for Retirement

Planning for retirement is essential from both a Trust and individuals' perspective. Duties from all parties involved in the process are listed below.

4.2 Duties

4.2.1 Manager

As a manager, once notified of an employee's intention to retire you should consider all requests in the context of service and individuals' needs.

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A letter will need to be written to formally accept this notice and a Termination Form completed via Manager Self-Serve (ESR) as soon as possible with the reason for termination as “Retirement”. In the cases of a member of staff Retiring and Returning, as well as the above, you will need to contact the Employment Support Services Team (RLI) or the Recruitment Team (FGH) who will then arrange a meeting with the individual so that the relevant new starter paperwork can be completed.

Once this form has been submitted you must contact SBS to obtain an AW8 Pension Form/Retirement Pack for the member of staff. The pension will not be processed without this so it is important to call for it. Please also see the Leavers Checklist under the Retirement Portal on the Workforce Intranet Page <http://uhmb/cd/hr/myjob/Pages/Retirement-Portal.aspx>

Things to consider when planning for a Retirement:

- Support staff in making the transition
- Plan a hand over period
- Develop mentoring / coaching roles during the transition so that expertise is not lost
- Manage the skill mix
- Plan Service developments
- Support succession planning
- Plan Long Service Award

You can contact the **SBS Team** on: **0303 123 1144**

4.2.2 Employees

As an employee, you must give your line manager at least 4 months’ notice when intending to retire in writing. Once this has been accepted and the Termination Form completed, your line manager must contact SBS to obtain an AW8 Pension Form/Retirement Pack.

Once you have received and completed this Form/Pack, you must return the relevant documents along with relevant certified copies of certificates to the NHS SBS Pensions Team; the forms will then be vetted and a letter of confirmation receipt will be sent to you.

The main consideration for staff approaching retirement is finances including money management and pensions. As this is a specialist area and the rules and requirements vary on an individual basis, please find some tools below that you might find useful when thinking of Retirement.

Pre-Retirement Information Sessions

These sessions cover various aspects and information around the retirement process such as:

- State Pensions & Allowances
- Company Pensions
- Investments & Savings
- Insurance & Other Benefits
- Wealth Preservation
- Wills and Succession Planning
- Long Term Care & Inheritance Tax.

These sessions take place a number of times per year at Royal Lancaster Infirmary (RLI)

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and the Furness General Hospital (FGH). Employees can book to attend a pre-retirement session via their TMS account.

You can contact the **Learning & Development Team** on: **01524 516242 (Ext. 46242)**

Total Reward Statement

Employees can access their Total Reward Statement/Annual Benefit Statement (pension estimate) via ESR. The SBS Pensions Team can also produce age-related estimates for members without charge where members may not have regular access to this. If there is a question regarding their pension estimate this will need to be checked with the NHS Pensions Agency, please note you may incur a charge for this.

Suggest staff:

- Visit <https://www.nhsbsa.nhs.uk/nhs-pensions> for further guidance on the various NHS Pension Schemes and their principles. Alternatively contact the **SBS Pensions Team** on **0303 123 1144** or seek advice from an independent financial adviser

4.2.3 SBS (Payroll Provider)

Once managers have processed the Termination Form in ESR and contacted the NHS SBS Pensions Team, the Team will issue the Retirement Pack to the employee's home address which includes:

- Form AW8
- Retirement Booklet
- Estimate of Benefits (If member has not had an estimate in the last 6 months)
- Equal Opportunities Form
- Letter and Certification Form
- Self-Addressed Envelope to return AW8 and relevant certificates to NHS SBS (postage not included)
- If VER (Voluntary Early Retirement), GMP Test will be requested from NHS Pensions

Once all documentation has been received by the employee and is correct, the NHS SBS Pensions Team calculates estimated pensionable/reckonable pay and application is submitted to NHS Pensions so the Pension award can be calculated. NHS SBS Pensions Team will send a confirmation letter to the employee confirming that their application has been submitted.

NHS Pensions will then confirm to the employee the details of the Pension award and instruct Equiniti Paymaster to make payment of benefits.

You can contact **SBS** on: **0303 123 1144** or visit their website at <https://www.sbs.nhs.uk/article/13730/Employment-Services-Web-Form>

4.2.4 Workforce

The Workforce team will provide support and guidance to both employees and managers in line with this policy, making certain that processes are run timely and consistently across the Trust.

As an acknowledgement for recognising staff's commitment and loyalty, a Retirement Award will be organised by the Workforce Team to employees who retire, whether normal retirement age or earlier. The conditions of the scheme are as follows:

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- The scheme is applicable to all employees who have at least 20 years' continuous service with the National Health Service
- The award must be 'in kind' and not in cash and retirement vouchers for specific retailers can be ordered by the Workforce Team who will be in touch to organise once notified and prior to the employee's retirement. The award is calculated on the basis of £5 for each year of continuous service
- Employees, who are eligible for a Retirement Award, will be offered to be presented with their award from the Chief Executive or an Executive Director. This will be supplemented with a certificate framed and signed by the Chief Executive of the Trust.
- The Trust can no longer facilitate the funding of Retirement Buffets through Charitable Funds, however department areas (colleagues and the line-manager) may organise a self-funded buffet for their colleague who is due to retire. The employees' Ward/Department could make the Presentation Ceremony arrangements and could invite close family or friends to the retirement celebration. The Ward/Department should contact the Workforce Team following discussion with employee if they would like this to be organised as part of the Presentation Ceremony in order to arrange an Executive Team representation.

You can contact the Workforce Team via **AskSAMI** on: **01524 519700 (Ext. 49700)** or email ask.sami@mbht.nhs.uk

4.3 Options for Retirement

4.3.1 Wind Down

Rather than simply retiring, staff may want to consider reducing the number of hours / days that they work in their current post. NHS Pensions, for part-time staff, are calculated on the whole time equivalent salary. This means that if staff work part-time when they come to retire, the pay that their NHS pension is based upon is as if they were paid full-time.

The service that they will accumulate will be reduced as all part time service is converted to whole time days i.e. if they worked exactly half time for a period of 2 years it will count as 1 whole time year. So if they wind down rather than retire, it will protect their previous service for the NHS pension but by reducing their hours / days this should not greatly reduce their pension. In the meantime, they can continue to build up pension entitlement.

Suggest staff:

- Visit <https://www.nhsbsa.nhs.uk/nhs-pensions> for further guidance on the various NHS Pension Schemes and their principles. Alternatively contact the **SBS Pensions Team** on **0303 123 1144**

4.3.2 Step Down

If staff no longer want the responsibilities that they currently have but they don't want to leave work altogether they may consider stepping down. Step down means that they step down into a less demanding job on lower pay whilst still making good use of their skills and experience. This will affect the salary that their pension is based upon if it is more than 3 years to their retirement. However it may possible to protect their pension dependant on the Pension Scheme that they are in.

Suggest staff:

- Visit <https://www.nhsbsa.nhs.uk/nhs-pensions> for further guidance on the various NHS

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Pension Schemes and their principles. Alternatively contact the **SBS Pensions Team on 0303 123 1144**

4.3.3 Retire and Return

Staff do not have to stop working in order to get their pension. Returning to work for the NHS after taking NHS Pension Scheme (NHSPS) benefits is an option available to NHSPS members.

Retire and Return can benefit both employers and employees by helping retain valuable skills and experience for patient care as well as supporting staff's health and wellbeing and work/life balance for those who may still wish to continue working.

There will be no guarantee that applications from staff to "retire and return" will be granted and applications will be considered, taking account of service, financial and workforce needs. Such criteria to be considered includes:

- The requirement for the post to be filled through "retire and return" in light of cost improvement pressures etc.;
- Equality requirements;
- The standard of the employee's work and attendance;
- The employee's competence (skills, knowledge and experience) against the essential requirements of the post;
- Whether the hours proposed can be accommodated / meet service needs;
- Succession planning and the potential impact the employee's return will have on their team;
- Whether it is in the best interests of the service to accommodate the "retire and return" request;
- Longer term workforce / service plans for the post and team and how the "retire and return" request fits with this.
- Returning to a lower banded post

When staff decide to retire and return, they must satisfy the conditions of the Trust's agreement and they must leave their contracted employment for **2 weeks**. After a two-week break, individuals may come back, but work up to 16 hours/week for the first two weeks upon their return. If staff do not have a break or they work more than 16 hours/week in the first 2 weeks, their pension will be suspended. After having worked on reduced hours for 2 weeks, staff could increase their hours in agreement with their manager. However, the combined earnings (salary + pension), cannot exceed the amount of earnings an individual was receiving prior to their retirement.

If staff wish to return to work on reduced hours, then managers should encourage employees to apply for flexible working (see Work and Home Life Policy). Upon return, it is anticipated that the contract will be substantive unless for a reason decided otherwise. This must be agreed with a Workforce Advisor.

For any staff who were previously appointed under the Whitley Ancillary Terms and Conditions which required some staff to bank annual leave upon commencing in post may need to recover this leave upon Retirement.

Suggest staff:

- Visit <https://www.nhsbsa.nhs.uk/nhs-pensions> for further guidance on the various NHS

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Pension Schemes and their principles. Alternatively contact the **SBS Pensions Team** on **0303 123 1144**

4.4 State Pension

The basic state pension (old age pension) is dependent upon the amount of National Insurance contribution that has been paid during the period of individuals' working life. There are certain circumstances where 'free credits' can or will be added to their pension e.g. for men between the ages of 60 & 65 years

Additional State Pension, also known as S2P (State second pension), previously known as SERPS (State Earning Related Pension Scheme), may be payable in addition to the basic state pension. This is dependent on staff earnings during periods where they have NOT been a member of the NHS Pension scheme or any occupational pension scheme. To receive an estimate of the state pension, staff should complete a BR19 form available on the Government's website (https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/526317/br19-interactive.pdf).

Once the form is completed and printed, it can be posted to Newcastle Pension Centre office. A State Pension statement can also be requested by calling on 0345 3000 168.

4.5 Did You Know? (Post-Retirement)

4.5.1 Bank Work

Individuals may want to consider becoming a member of the Trust's 'Bank Staff'. The Trust has a range of bank schemes that allow staff to work as & when they want to. This may well fit with their retirement plans and supplement their income whilst maintaining their skills and expertise.

Suggest staff:

- Contact the **Employee Support Services** (tel. 01524 516069, 01524 516096, 01524 516083 or ext. 46069, 46096, 46083)

4.5.2 Volunteer

Another option is for staff to volunteer their time to any one of the support services e.g. WRVS or become a Trust volunteer. Although unpaid it can be very rewarding and can maintain valuable links with colleagues.

Suggest staff:

- Discuss benefits with current volunteers
- Contact the **Workforce Team** (tel. **01524 519700**, ext: **49700**) or (email ask.sami@mbht.nhs.uk)

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5 ATTACHMENTS	
Number	Title
1	Retirement / Leavers Checklist
2	Process for Retire and Return Employees
3	Process for Retiring Employees
4	Acceptance of Notice to Retire and Return Template Letter
5	Acceptance of Notice to Retire Template Letter
6	Equality & Diversity Impact Assessment Tool

6 OTHER RELEVANT / ASSOCIATED DOCUMENTS	
Unique Identifier	Title and web links from the document library
Corp/Pol/137	Work and Home Life Policy http://uhmb/cs/tpdl/Documents/CORP-POL-137.docx

7 SUPPORTING REFERENCES / EVIDENCE BASED DOCUMENTS	
References in full	
No.	References
1	NHS Pensions https://www.nhsbsa.nhs.uk/nhs-pensions (accessed 13/09/2017)
2	NHS Shared Business Services. Employment Services Web Form https://www.sbs.nhs.uk/article/13730/Employment-Services-Web-Form (accessed 13/09/2017)
3	DWP State Pension Statement https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/526317/br19-interactive.pdf (accessed 13/09/2017)
Bibliography	

8 DEFINITIONS / GLOSSARY OF TERMS	
Abbreviation or Term	Definition
ESR	Employee Staff Record
HR	Human Resources

9 CONSULTATION WITH STAFF AND PATIENTS		
Enter the names and job titles of staff and stakeholders that have contributed to the document		
Name	Job Title	Date Consulted
Joint Working Group		06/09/2017
Policy Development Group		08/09/2017

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10 DISTRIBUTION PLAN	
Dissemination lead:	Workforce Team
Previous document already being used?	No
If yes, in what format and where?	
Proposed action to retrieve out-of-date copies of the document:	
To be disseminated to:	
Document Library	Yes
Proposed actions to communicate the document contents to staff:	Include in the UHMB Friday Corporate Communications Roundup – New documents uploaded to the Document Library

11 TRAINING		
Is training required to be given due to the introduction of this policy? Yes		
Action by	Action required	Implementation Date
Workforce team / Staff Side Representative	Guidance Sessions	

12 AMENDMENT HISTORY				
Version No.	Date of Issue	Page/Selection Changed	Description of Change	Review Date
2	April 2013	All	Sections through guidelines reordered	April 2016
		Throughout	Minor wording amendments throughout all sections to provide clarity	April 2016
		New	Application section added	April 2016
			Taken out section re in house leaflet and repeat of Employment	April 2016
2.2	20/04/2016	Page 1	Review Date extended to 01/09/2016	01/09/2016
2.3	25/09/2016	Page 1	Review Date extended to 01/09/2017	01/09/2017
3	06/09/2017	All	Amended throughout document	01/09/2020
3.1	13/11/2017	Appendix 1	Retirement / Leavers Checklist updated	01/09/2020
3.2	05/04/2018	Appendix 4,5	Update to letter templates	01/09/2020
3.3	26/11/2018	Appendix 2,3	Flowcharts updated	01/09/2020
3.4	14/01/2019	Appendix 2,3	Flowcharts updated	01/09/2020

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Appendix 1: Retirement / Leavers Checklist

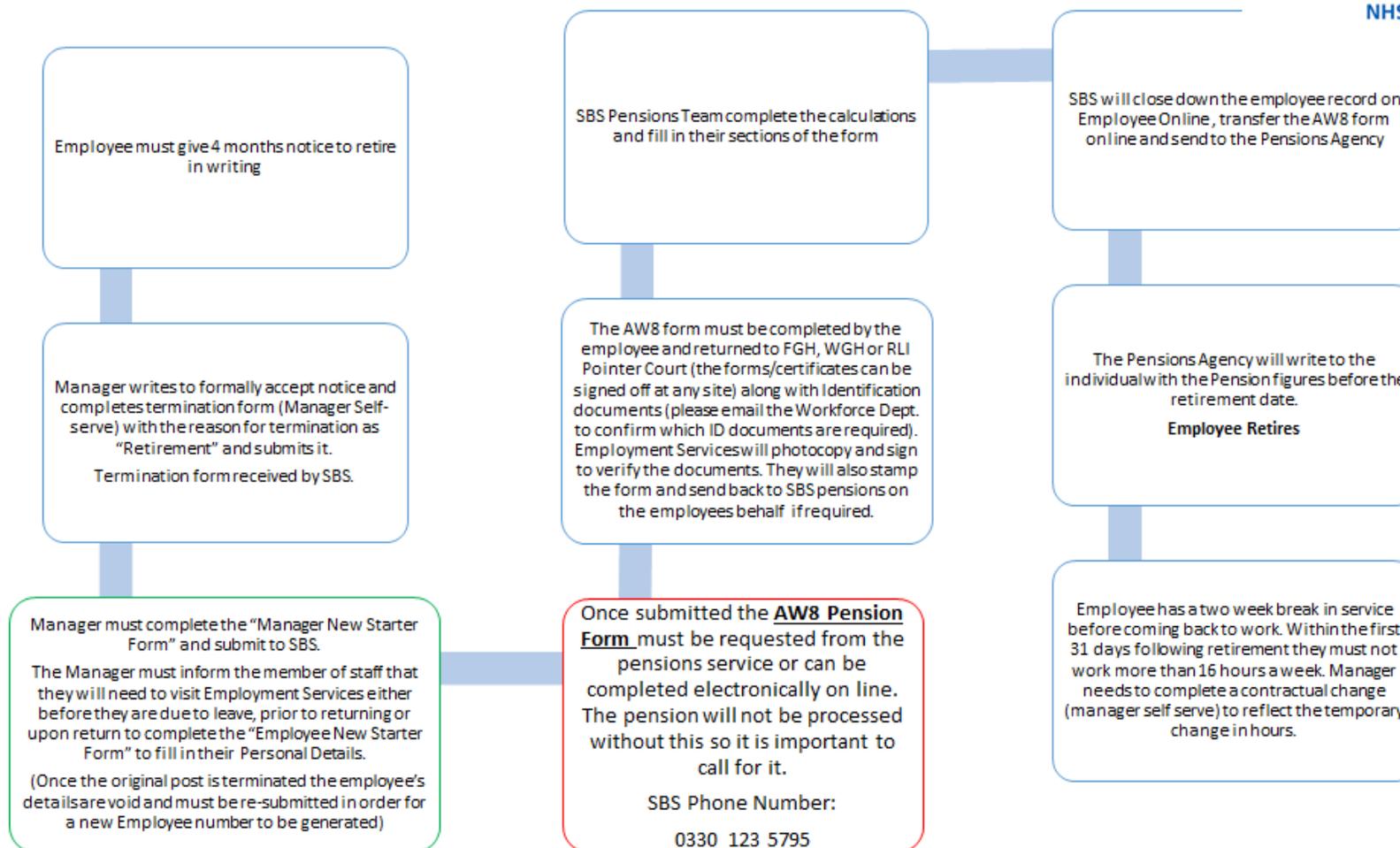
Leaver Checklist		
Name of Employee		
Ward/Department		
Job Title		
Date of Termination		
Item	Items returned (Y/N)	Signature
Keys		
Final Timesheet		
Identification Badge		
RA Smartcard		
Termination Form on ESR		
Uniform/Shoes		
Car Parking Permit		
Disable IT Passwords (for all systems) N.B Email: servicedesk@mbhci.nhs.uk and ask for their Active Directory account to be disabled		
Exit interview		
Phone/Laptop/Blackberry (return to local Health Informatics office)		
Inform L & D / Health Informatics for the TMS system		
If individual is under Occupational Health, please inform the OH department so future appointments are not made.		
Is this individual a Manual Handling Key Trainer/Health and Safety Rep/Bedrail Assessor/First Aider, if so please inform Health and Safety.		
RETIRING EMPLOYEES ONLY		INITIALS
An acceptance of notice to retire letter will need to be written to formally accept this notice of retirement (this can be found under the Retirement Portal on the Workforce Intranet Page http://uhmb/cd/hr/myjob/Pages/Retirement-Portal.aspx)		
If the individual is retiring the manager must contact SBS on 0303 1231144 for the relevant Retirement/Pensions forms to be sent to the individual – this must be done when the termination form is submitted in order for the individual to receive their pension.		
If a retiring employee has over 20 years' service with the Trust they are entitled to £5 worth of vouchers for every year's continuous service that they have completed. The Ask SAMI Team will automatically check for entitlement when the termination form is completed, so please ensure this is done 4 months prior to the retirement date. For any questions relating to these vouchers please call 01524 519700.		
Managers Signature		
Date		

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Appendix 2: Process for Retire and Return Employee



Process for Retire and Return Employees

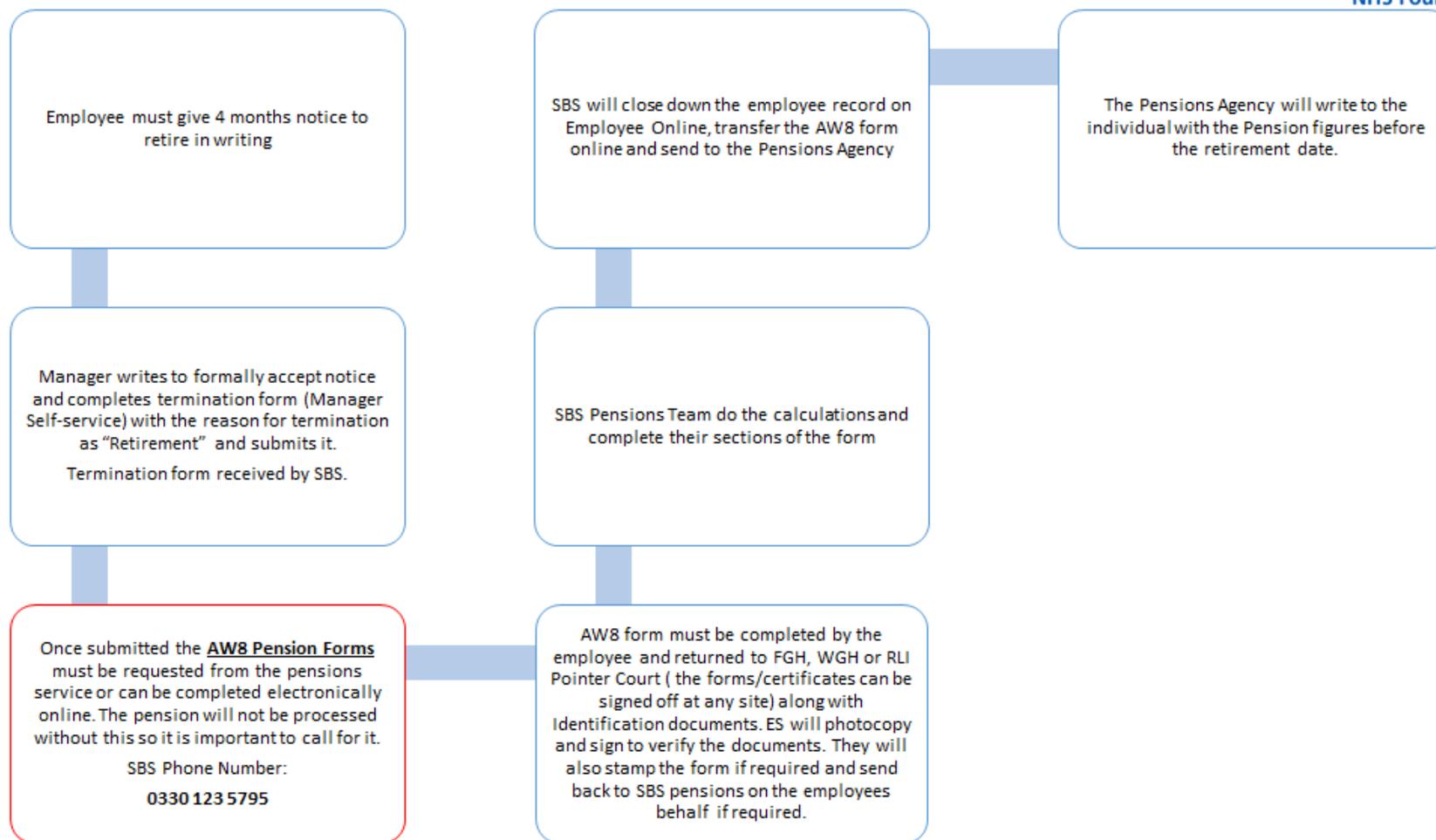


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Appendix 3: Process for Retiring Employees



Process for Retiring Employees



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Appendix 4: Acceptance of Notice to Retire and Return Template Letter



University Hospitals of Morecambe Bay NHS Foundation Trust

[DEPARTMENT]
Furness General Hospital
Dalton Lane
Barrow-in-Furness
Cumbria
LA14 4LF
Tel:
Fax:
Web: www.uhmb.nhs.uk

(Date)

Private and Confidential

(Name)
(Address)

Dear

Acceptance of Notice to Retire and Return

Thank you for submitting your notice with intention to retire on <DATE>. I can confirm that I have accepted this and your leaving date from the Trust will be <DATE>.

I have completed your termination paperwork and I will now make contact with SBS our Payroll and Pensions provider to obtain the paperwork you need to claim your pension. They will send you the AW8 form and a letter detailing the process from here.

As you have decided to retire and return I have also completed your new starter paperwork for your return on <DATE>. You will have a <NUMBER OF WEEKS> break from employment and then return to <ROLE> for <HOURS> per week. You will be given a new payroll number once you return.

If you have any queries with regards to your pension the Pensions Agency telephone number is 0845 4214000. You can also contact (Name), Workforce Assistant for further advice or support.

As you have over 20 years' service with the Trust you are entitled to retirement vouchers (£5 for each full year of service) I will make contact with the Workforce Benefits Team at FGH to order these for you. (DELETE IF DOES NOT HAVE OVER 20YEARS SERVICE)

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I would like to thank you for your hard work and service with the Trust over the last <INSERT AMOUNT> years.

Yours sincerely

Manager name

Manager title

Copy to: <NAME>, Workforce Assistant

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Appendix 5: Acceptance of Notice to Retire Template Letter



University Hospitals of Morecambe Bay NHS Foundation Trust

[DEPARTMENT]

Furness General Hospital
Dalton Lane
Barrow-in-Furness
Cumbria
LA14 4LF
Tel:
Fax:
Web: www.uhmb.nhs.uk

(Date)

Private and Confidential

(Name)
(Address)

Dear

Acceptance of Notice to Retire

Thank you for submitting your notice with intention to retire on <DATE>. I can confirm that I have accepted this and your leaving date from the Trust will be <DATE>.

I have completed your termination paperwork and I will now make contact with SBS our Payroll and Pensions provider to obtain the paperwork you need to claim your pension. They will send you the AW8 form and a letter detailing the process from here.

If you have any queries with regards to your pension the Pensions Agency telephone number is 0845 4214000. You can also contact (Name), Workforce Assistant for further advice or support.

As you have over 20 years' service with the Trust you are entitled to retirement vouchers (£5 for each full year of service) I will make contact with the Workforce Benefits Team at FGH to order these for you. (DELETE IF DOES NOT HAVE OVER 20 YEARS SERVICE)

Thank you for your hard work and service with the Trust over the last <INSERT AMOUNT> years.

Yours sincerely

Manager name

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Manager title

Copy to: <NAME>, Workforce Assistant

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Equality Impact Assessment Form

Department/Function	Workforce			
Lead Assessor	Autumn Whalley			
What is being assessed?	Retirement Guidelines			
Date of assessment	13 th September 2017			
What groups have you consulted with? Include details of involvement in the Equality Impact Assessment process.	Equality of Access to Health Group	<input checked="" type="checkbox"/>	Staff Side Colleagues	<input checked="" type="checkbox"/>
	Service Users	<input checked="" type="checkbox"/>	Staff Inclusion Network/s	<input checked="" type="checkbox"/>
	Personal Fair Diverse Champions	<input checked="" type="checkbox"/>	Other (Inc. external orgs)	<input checked="" type="checkbox"/>
	Please give details:			

1) What is the impact on the following equality groups?		
Positive:	Negative:	Neutral:
<ul style="list-style-type: none"> ➤ Advance Equality of opportunity ➤ Foster good relations between different groups ➤ Address explicit needs of Equality target groups 	<ul style="list-style-type: none"> ➤ Unlawful discrimination, harassment and victimisation ➤ Failure to address explicit needs of Equality target groups 	<ul style="list-style-type: none"> ➤ It is quite acceptable for the assessment to come out as Neutral Impact. ➤ Be sure you can justify this decision with clear reasons and evidence if you are challenged
Equality Groups	Impact (Positive / Negative / Neutral)	Comments <ul style="list-style-type: none"> ➤ Provide brief description of the positive / negative impact identified benefits to the equality group. ➤ Is any impact identified intended or legal?
Race (All ethnic groups)	Neutral	
Disability (Including physical and mental impairments)	Negative	Members of staff who have difficulties in reading and understanding the content of the policy may need additional support This is not intentional and action will be taken as outlined in section 3 to address this
Sex	Neutral	
Gender reassignment	Neutral	
Religion or Belief	Neutral	
Sexual orientation	Neutral	
Age	Neutral	
Marriage and Civil Partnership	Neutral	
Pregnancy and maternity	Neutral	
Other (e.g. caring, human rights)	Neutral	

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2) In what ways does any impact identified contribute to or hinder promoting equality and diversity across the organisation?	None
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<p>3) If your assessment identifies a negative impact on Equality Groups you must develop an action plan to avoid discrimination and ensure opportunities for promoting equality diversity and inclusion are maximised.</p> <ul style="list-style-type: none"> ➤ This should include where it has been identified that further work will be undertaken to further explore the impact on equality groups ➤ This should be reviewed annually.
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Action Plan Summary

Action	Lead	Timescale
Any member of staff having difficulties reading and understanding the content of this policy will be offered support to explain the processes outlined in this policy by appropriate Personnel	Autumn Whalley	30/09/2017

This form will be automatically submitted for review for Policies and Procedures once approved by Policy Group. For all other assessments, please return an electronic copy to EIA.forms@mbht.nhs.uk once completed.

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