

Appendix 2 - Scheme For Voluntary Early Retirement by Reason Of Interests Of The Efficiency Of The Service

1. Implementation of the Scheme

- 1.1 Requests for applications to retire early on the grounds of efficiency of the service must be made in writing to the applicant's Head of Service initially. The applicant's line manager and HR should also be informed. The Head of Service will informally discuss the application with the Chief Executive. The written application will not be considered unless the Chief Executive is satisfied that all of the following criteria are met.
- a) The employee is aged over 55 years and has a minimum of two years' service with Warwick District Council.
 - b) There is a changing need of skills within the post that the postholder cannot meet, retraining having been considered.
 - c) The applicant has no current disciplinary investigations/sanctions (i.e. warning letters not expired) or grievances against them, has given good service but has reached a point in their career where they are unable to adapt to the changing needs of the organisation, for example new technology, systems or working practices. It can be demonstrated that this has a detrimental effect on the efficiency of the organisation.
 - d) All other options have been considered for the applicant i.e. a reduction in hours, job share, redeployment or a change in duties.
 - e) The retirement of the individual will provide a benefit or opportunity to the organisation for example in terms of increased productivity/effectiveness, improved customer relations, achievement of objectives as stated in the Service Area Plan, a financial saving.
 - f) There is no perceived difficulty in recruiting to the post.
 - g) This must not be used as a means of dealing with poor performance, that should be dealt with in accordance with the Council's Performance Management/Capability Policy.
 - h) The individual must be prepared to work their notice. If an earlier termination date is mutually agreed, there is no entitlement to pay in lieu of notice.
- 1.2 It is recognised that there may be financial costs to the Council, but these should be mitigated by the benefit to the service. The Head of Service will need to demonstrate the benefit of any early retirement, illustrating all potential costs, benefits and risks, to the Chief Executive. If, after taking into account cost and risk to service provision, the Chief Executive, agrees the proposal demonstrates that there is a benefit to the Council which outweighs the financial cost, they can agree the request.

- 1.3 The Head of Finance and Chief Executive have responsibility for the authorisation of expenditure from the Services Transformation Reserve. This is carried out in consultation with relevant portfolio holders and reported in subsequent budget reports.
- 1.4 If there are insufficient funds in the Services Transformation Reserve to meet the costs a further request will be made to Cabinet for approval of the funding.
- 1.5 If the request, and funding, is approved a leaving date will be agreed with the applicant and Head of Service as (h)),
- 1.6 If the request is not approved there is no right of appeal.
- 1.7 Further applications will not be considered within a 12-month timeframe.

2. **Compensatory Payments**

- 2.1 An employee who requests to retire early on the grounds of efficiency of the service, and is given approval to do so, will be entitled to early release of pension benefits accrued and the Council will meet the costs of releasing these early. There is no entitlement to added or augmented service.
- 2.2 It should be stipulated to the applicant that if approved, this agreement is confidential.

Updated for clarity January 2023