



The Scottish Parliament
Pàrlamaid na h-Alba

Partial Retirement: Guidance for Staff

Pàirt-chluaineas: Stiùireadh do Luchd-obrach

19 September 2018



Introduction

This section explains our policy on the retirement of staff and also gives guidance on partial retirement.

Retirement policy

The SPCB does not operate a retirement age policy. This means that there is no upper age limit beyond which you would be automatically retired and you are free to continue in employment for as long as you wish subject to the normal rules concerning [Performance](#), [Attendance](#) and [Conduct](#).

It is important to note however, the difference between state pension age and normal pension age (NPA) and that the retirement policy does not affect the age on which you may retire and have immediate access to your Civil Service Pension benefits. Currently these are:

- NPA for the alpha scheme is the later of age 65 or your state pension age.
- NPA for the classic, classic plus and premium schemes is 60

The Human Resources Office will write to you at least 12 months before you reach pension age to remind you of the scheme rules so that you can think about the options open to you.

It will be your responsibility to inform us of your intended retirement date. However, you must inform the Human Resources Office at least 3 months before your planned retirement date to ensure the necessary actions are taken to pay your pension on time.

Partial Retirement

Partial retirement is a potential option which, subject to the SPCB approving your application, allows you to move gradually from work into retirement rather than moving overnight from full-time work to full-time retirement. This may work well for you as it allows you to adjust to a new lifestyle. It can also work well for the SPCB as it allows us to retain your skills while making space to bring on other employees or develop less experienced staff.

Whilst working on a partial retirement basis you will continue to build up further pension entitlement in your current scheme on a pro-rata basis in accordance with the number of hours you work until you finally retire.

Partial Retirement

It allows you to draw on some or all of your pension benefits and remain in work. In order to do this, you must reduce your pensionable earnings (including additional allowances or shift pay) by at least 20 per cent and the change must be permanent. This will require reshaping your job in a way which meets both your needs and the continuing needs of the business. Knowing what partial retirement options are available to you will help you in your thoughts and planning for your future working life.

Preparing your request to reshape your job

Having a clear understanding of what will work for the role and your immediate and wider team and what will not, is an important step in the process of determining whether and how flexible/partial retirement working arrangement can be successful.

To help you reshape your existing role you should:

- Develop an accurate job description. This will help you identify what elements of your job might affect the number of days, hours and format of your proposed working arrangement.
- ⇒ Estimate the percentage of time and energy you give to each task/activity. Rate how important each task/activity is to achieve your job outcomes.

- What are the opportunities and implications? Make sure your proposal works for your immediate colleagues, direct reports and your wider team. If you manage staff, discuss your proposal with them in advance.
- ⇒ Are there any financial savings such as reduced staffing costs, better productivity or reduced office space?

- Identify and address any negative impacts on you and for your direct reports and wider team, for example, are there any costs relating to backfilling roles?
- ⇒ Be aware of the difference of a busy workload versus an unmanageable workload to make sure that busy periods are balanced.

- Assess the compatibility of your proposal with the needs of the SPCB, in the short, medium and long term.
- ⇒ There should be no detriment to others so be prepared to make suggestions to your manager on how individual work objectives and activities may be delivered.

Discuss your request for flexible retirement with your manager **before** making a formal request. This will give them the opportunity to understand the reasons for your request.

Making a Formal Request

If you wish to apply for partial retirement you should follow the procedures as set out in our [Flexible Working Procedure](#). Any variation to your working arrangements will require the approval of your group/office head.

Considering your request

Your line manager will consider your request by thinking through the service needs and workload management implications, alongside your personal needs. Remember the aim is to make changes which maintain or improve performance and wellbeing – your own and that of your direct reports and immediate/wider team.

To do this, your line manager will consider the following things:

- How does the role contribute to the parliament's strategic aims?
 - ⇒ Are there any planned changes that may result in additional or amended duties?
 - ⇒ What interaction is required with others across the parliament, how often should it happen and why is it necessary?

- Is there adequate support in the current organisational structure to enable the job to be effective? This includes sufficient authority, resources and management support.
 - ⇒ Is there any overlap with other functional leads/roles?

- Can your request be met simply by reducing your working hours in the same role, or does it entail a change in the nature of the work you do, or even a move to a different job?
 - ⇒ Could some of the job deliverables be achieved by other colleagues in the work area to save money, enrich their jobs and develop their capabilities?
 - ⇒ Will your line manager need to recruit another member of staff to cover the work required, and if so, is this feasible (e.g. it is sometimes difficult to recruit for a post which is only needed for one or two days per week)?

- Are any methods of work outdated?
 - ⇒ Can technology play a role in improving work methods?

- Time of the change. Are there any factors such as major events or key dates in the parliamentary cycle which might influence when your office/group would want the new arrangement to start?

Considering your request

- Your personal circumstances. Are there exceptional personal circumstances relevant to your request which need to be taken into account?
 - Future planning. Would it be helpful to the group/office head for succession planning reasons, or to you, for retirement planning purposes, to link the decision of partial retirement to the decision about eventual full retirement?
- ⇒ Remember, clarity from you about how long a period of partial retirement is intended to last will make it easier for your group/office heads to assess and mitigate the impact that approval will have on business needs going forward. Be assured that your application will never be used as a means of compelling you to agree a fixed retirement date.

Where the arrangement proposed cannot be accepted for business needs, your line manager may propose an alternative, such as:

- A greater or lesser reduction of working hours
- A move to a different post so that the reduction in hours could be accommodated
- A move to a lower graded post (with a commensurate reduction in salary and possible change in job title) where the reduction in hours could not be accommodated.

Review and longer-term planning

As parliamentary business and individual circumstances are continually changing, working arrangements will be reviewed regularly and any issues that arise will be dealt with as soon as possible.

All partial retirement arrangements will be reviewed annually to ensure they are meeting the needs of the individual and the SPCB. If the arrangement is not working for one or both parties, then the original decision should be reconsidered and alternative options set out above should be explored. Advice should be sought from the HR Office in these circumstances.

Further information about partial retirement can be obtained by reading the booklet *Partial Retirement – A Guide for Scheme Members* or by phoning the My Civil Service Pension Helpline on 0300 123 6666.

Pension information

You are strongly advised to fully consider your pension arrangements before making your decision to retire. Further information about your pension benefits under the classic, classic Plus, premium, nuvos and alpha schemes can be obtained by phoning the My Civil Service Pension Helpline on 0300 123 6666 or visiting their website at [Civil Service Pension](#). If you have a Partnership Pension you should phone your pension provider direct.

Pre-retirement courses

Retirement may seem like a lifetime away for some, for others it may be within the next few years. Regardless of your age, you only get one chance to prepare for it. If you are thinking about retirement, it can be helpful to be prepared and take some time to think about your retirement options and the choices you'll need to make. Start by having a conversation with your manager to identify some development options that will work for you and refer to the resources available in SP learning under My Career. These will then be considered as per any other request for learning and development in relation to you as well as the wider needs of the team and the Scottish Parliament.

Enquiries

If you have any enquiries about retirement or your pension please contact the Human Resources Office on ext 86500 or submit your enquiry by emailing humanresources@parliament.scot

Partial Retirement: Guidance for Staff (English only)

For further information contact:

HumanResources@parliament.scot

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