

Title of POL: Retirement Policy

Custodian: Chief People Officer

Version Number: 02

Issue date: 25.07.25

Review date: 25.07.28

**POLICY (POL)**

Title of Policy	Retirement Policy		
What type of document is this?	Policy (POL)	Policy Reference Number	HHH-POL-026
Purpose of POL	<p>We are proud to employ people of all ages and consider that age diversity is beneficial to the organisation. We are committed to not discriminating against colleagues because of age and adhere to the principles set out in our Dignity at Work Policy.</p> <p>We have no fixed retirement age. We believe that employees should, wherever possible, be permitted to continue working for as long as they wish to do so.</p> <p>This policy aims to create a framework for workplace discussions, enabling you to express your preferences and expectations with regard to retirement and enabling us to plan for our business.</p> <p>This policy applies to all employees. It does not apply to agency workers, consultants, or self-employed contractors.</p> <p>This policy does not form part of any employee's contract of employment, and we may amend it at any time.</p>		

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**ROLES AND RESPONSIBILITIES**

Include in this section details of the key roles and associated responsibilities relevant to the document

Roles	Responsibility
Chief People Officer	Is responsible for reviewing and updating this policy and ensuring that the policy is communicated across the company through the Senior Management Team(s)
Helping Hands Managers	Is responsible for implementing and embedding this policy within all teams across the company
Helping Hands Employees	Is responsible for adhering to this policy as directed by line managers

**1.0 Workplace Discussions**

- 1.1 You or your line manager may want to discuss your short, medium, and long-term plans, as the need arises.

For example, a promotion opportunity may arise, or, if your circumstances change, you may want a different working pattern or to stop work altogether. We need to plan for the business and so may indicate to employees from time to time that it would be helpful to know what their plans are. There is no obligation for us or you to hold workplace discussions about your future plans, but it may be mutually beneficial to do so on an informal basis.

We will not make generalised assumptions that performance or capability will decline with age, whether due to competence or health issues. If we think there are problems with your performance or capability, these will be dealt with in the usual way, through the Capability Policy and Procedure or Absence Management Policy and Procedure.

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During any workplace discussion:

- 1.1.1 we will not assume that you want to retire just because you are approaching a certain age, such as state pension age; and
- 1.1.2 we will not make discriminatory comments, suggesting that you should move on due to age.

Your employment or promotion prospects will not be prejudiced because you express an interest in retiring or changing work patterns.

If you indicate that you are thinking of retiring, you are free to change your mind at any time until you have actually given notice to terminate your employment.

## **2.0 Flexible Working**

- 2.1 If you express an interest in moving to a more flexible working pattern or changing role, you may wish to make a request to change your working arrangements under our Flexible Working Policy.

We will confirm what it is you want to do before any action is taken which could affect your employment, such as a change to your role or responsibilities.

## **3.0 Notice to retire voluntarily**

- 3.1 If you wish to retire voluntarily, you must resign in writing giving at least the period of notice set out in your contract of employment.
- 3.2 However, we do encourage you to have early conversations with your line manager about your retirement plans as far in advance as possible to help us with our workforce planning and to ensure that you are provided with the support that you need to help you transition into your retirement.

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#### 4.0 Succession planning

- 4.1 We may require your assistance and cooperation to allow for succession planning. This may include asking you to take on a mentoring role or handing over some responsibilities before your retirement takes effect.

#### 5.0 Pension benefits

- 5.1 When you can start drawing from your pension will depend on the pension scheme rules. Contact details for our workplace pension provider can be obtained from the Payroll department.

We strongly advised you to consider your pension arrangements and take independent financial advice before making any decision in relation to your retirement.

<b>TRAINING</b>	No
Is training required?	
Details of training	N/A
<b>COMPLIANCE</b>	Compliance with this policy will be monitored via line managers.
How is compliance within this document going to be monitored?	

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EQUALITY IMPACT ASSESSMENT AND PROCEDURAL INFORMATION		
	Positive/Negative/N/A	Comments
Does the document have a positive or negative impact on one group of people over another based on their:		
• Age?	Positive	Retirement policy includes clauses relating to ensuring there is no discrimination against employees of retirement age who are still working
• Disability	N/A	
• Gender assignment?	N/A	
• Pregnancy and maternity (which includes breastfeeding)	N/A	
• Race (including nationality, ethnic or national origins or colour)?	N/A	
• Marriage or civil partnership?	N/A	
• Religion or belief?	N/A	
• Sex?	N/A	
• Sexual orientation?	N/A	

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If you have identified any potential impact (including any positive impact which may result in more favourable treatment for one particular group of people over another), are any exceptions valid, legal and/or justifiable?	See comments above for 'Age'. Policy related to 'retirement' is legal and justifiable.	
If the impact on one of the above groups is likely to be negative:		
Can the impact be avoided?	N/A	
What alternatives are there to achieving the document's aim without the impact?	N/A	
Can the impact be reduced by taking different action?	N/A	
Is there an impact on staff, customer or someone else's privacy?	N/A	
Changes since previous version	No changes to Policy content at point of review Policy added to new template	
Who was involved in developing /reviewing/amending the document? (list titles)	Chief People Officer People Advisor Team Lead	
How confidential is this document	Restricted	Can be shared freely within Helping Hands but NOT outside
References		
Associated Documents		

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