

Christ Church Ware

Working Beyond Age 70

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Operations manager

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1.0

Introduction

1.1

Christ Church recognises the contribution that all staff make to the organisation regardless of age.

1.2

The Government's response to the Age Regulations was to set a *national default retirement age of 65 years which is subject to review in 2011*. The introduction of the Age Regulations do not however, prevent employers from choosing to set a later retirement age beyond the Government's default retirement age of 65 years.

1.3

Christ Church in recognition of the demographic trends and in its wish to promote equality of opportunity in the workplace has agreed to set a later retirement age of **70** years for all employees. This does not however prevent employees from retiring at an earlier age, for example below 65 years where they are initiating their own retirement. Christ Church will therefore not impose a retirement below 70.

1.3

The adoption of a later retirement age of 70 years is a local agreement between management, the Parochial Church Council and staff.

2.0

Purpose and Aims of the Policy

2.1

Changing demographics and lifestyles coupled with current and future business needs has had a major influence on why Christ Church has decided to introduce a later retirement age of 70 years. Christ Church values ability and acknowledges that it is the relevance of someone's skills and experience that is critical in assessing their suitability for employment rather than age. This is consistent with Christ Church's commitment to equality and diversity.

2.2

Research by the Department of Work and Pensions shows that many older people would prefer to continue to work beyond the state retirement age and that older people want to be independent for as long as possible. Those with small pensions are most likely to work beyond state retirement age therefore suggesting that there is a financial imperative for some to continue working and a desire for continued job satisfaction for others.

3.0

Policy Statement

3.1

This policy sets out Christ Church's position on the retirement of staff. It gives staff the right to work beyond the Government's default retirement age of 65 years and up to the age of 70 years without relying on the discretion of Christ Church.

3.2

Staff wishing to work beyond Christ Church's retirement age of 70 years must however apply in writing using the standard application form. Approval will be subject to satisfying the criteria set out at 6.2 below.

4.0 Scope of Policy

4.1 This policy refers to all staff nearing retirement.

5.0 Responsibilities

5.1 It is the responsibility of the Operations Manager to implement the policy and associated procedure as described in the appendices.

6.0 Procedure for Working Beyond Christ Church's Retirement Age of 70 Years

6.1 The procedure for working beyond Christ Church's' retirement age of 70 years is set out in appendix I along with accompanying flow chart in appendix II.

6.2 Christ Church will assess each application to work beyond 70 years of age in accordance with the criteria set out below:

6.2.1 The needs of the Church

Is there a continued service need for the ongoing employment of the staff in the area in question?

6.2.2 Recruitment Difficulties

Is there a skills shortage/are posts hard to recruit in this area in question?

6.2.3 Availability of Skills

Does the individual have particular skills which would support Christ Church in continuing to deliver its services?

7.0 Terms and Conditions

7.1 Where an individual works beyond the age of 70 years, the terms and conditions of service will remain unchanged.

8.0 Remuneration/Superannuation/Benefits

8.1 Members of staff are responsible for ensuring that they have fully checked the financial impact of a particular course of action on their pension situation before making a final decision. They should consult their own Superannuation Branch.

9.0 Recruitment and Promotion

- 9.1 Whilst there is an exception under Age Regulations to not appoint someone who is within six months of the employer's normal retirement age (in this case 70), Christ Church will still welcome applications for employment or promotion from those within 6 months of Christ Church's retirement age of 70 years. Such applications will be considered on the merit principle.

10.0 Training and Development

- 10.1 Employees training and development needs will be identified by their Line Managers through normal channels, for example, Staff Development and Performance Review process irrespective of their age and proximity to Christ Church's retirement age.

11.0 Monitoring

- 11.1 Christ Church will monitor the application of its 70+ policy and report to the PCC annually.

- 11.2 Monitoring information will be analysed to inform any necessary and appropriate positive action measures in ensuring effective workforce planning.

12.0

Review

- 12.1 In order to assess the operational effectiveness of Christ Church's 70+ policy a review will be undertaken at regular intervals particularly in light of legislative developments and not later than three years following implementation.

13.0

Equality and Human Rights Considerations

- 13.1 This policy has been screened for equality implications as required by Section 75 and Schedule 9 of the Northern Ireland Act 1998. Equality Commission guidance states that the purpose of screening is to identify those policies which are likely to have a significant impact on equality of opportunity so that greatest resources can be devoted to these.
- 13.2 Using the Equality Commission's screening criteria, no significant equality implications have been identified. The policy will therefore not be subject to an equality impact assessment.
- 13.3 Similarly, this policy has been considered under the terms of the Human Rights Act 1998, and was deemed compatible with the European Convention Rights contained in the Act.

14.0 General Information

- 14.1 Further information about this Policy and the full range **of work life balance provisions can be obtained from:**

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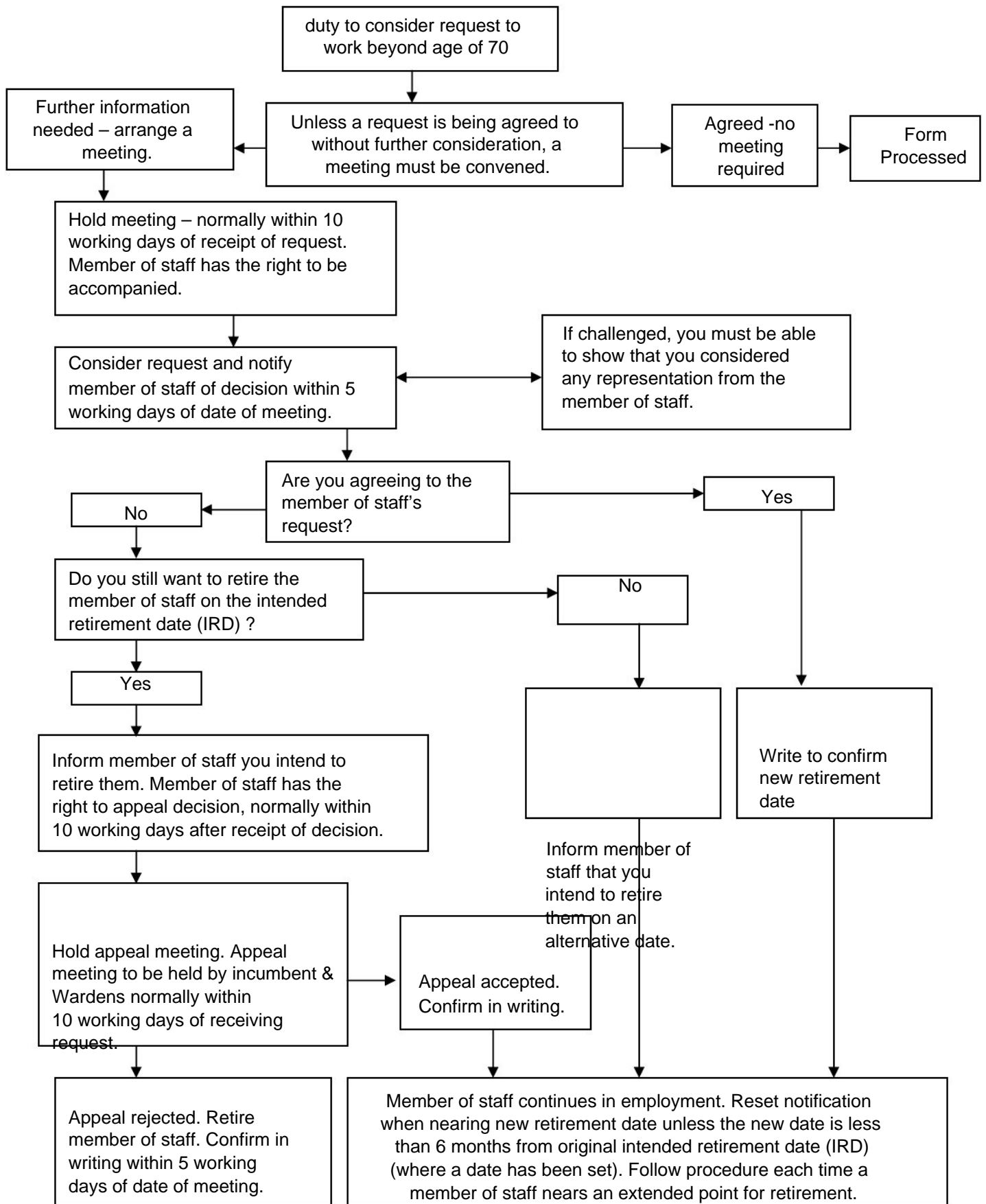
Appendix 1

Procedure for Working Beyond The Church's Normal Retirement Age of 70 Years

- 1 Notification of retirement – it is the responsibility of Christ Church to inform individual members of staff in writing at least six months, but no more than twelve months before their 70th birthday. Christ Church must also inform staff of their right to request to continue working beyond the normal retirement age of 70.
- 2 This will be done by way of a letter from the Operations Manager and will adhere to the statutory timescales for doing so as in 1 above.
- 3 The member of staff then has to consider their options, which are outlined in the letter from the Operations Manager, and reply to the Operations Manager indicating what action they wish to take.
- 4 Where a member of staff indicates that they wish to work beyond Christ Church's normal retirement age of 70 years, the Operations Manager will notify the PCC of the request. Where the member of staff has properly notified and wishes to continue working, they must request to do so within 3 months before the intended retirement date. The request must be by letter. However, if there is a failure to notify the member of staff appropriately as in 1 above, they can then make their request at least 4 weeks before expiry of their notice or, if this is not feasible, as soon as reasonably possible, subject to a cut off point of four weeks after the notice has expired.
- 5 If the request is to be agreed, the manager does not need to meet formally with the individual. In such cases the form should be signed and the recommendation to facilitate the request made to the PCC to confirm the decision. In the event of the Operations Manager having any concerns the remaining process will be followed:-
 - 5.1 The Operations Manager must arrange a meeting with the member of staff to discuss the request in full and this will normally occur within 10 working days of receiving the request. This meeting gives the member of staff an opportunity to put their case to the Operations Manager. Christ Church **will** give serious consideration to the request, in light of the criteria set out at paragraph 6.2 of the policy. Whilst requests will not be unreasonably refused, there may be occasions when this will occur. Christ Church may also propose alternative working patterns and retirement dates, other than those proposed by the member of staff, if appropriate.
 - 5.2 The member of staff has a right to be accompanied at this meeting by a Someone that you have chosen who must be a member of the congregation (who may address the meeting but not answer questions on the member of staff's behalf and who may confer with the member of staff during the meeting).
- 6 The Operations Manager must inform the member of staff in writing of their decision Within 5 working days of the date of the meeting. Where the request is being turned

- down and in accordance with Christ Church's desire for openness and transparency, the reason for the decision will be clearly documented. The member of staff's employment continues until they are informed of the decision in regard to their request. If agreeing to the request in all or in part, the written decision must confirm the new retirement date (where applicable).
- 7 The member of staff may appeal against the decision normally within 10 working days after receiving notification of the decision. They can appeal the decision if Christ Church refuses the request in its entirety or if the request is accepted but for a shorter period than the member of staff requested to continue working. In the event of Christ Church refusing the request, the planned retirement date will not be delayed even if this means that the appeal meeting is held after the retirement date.
 - 8 The appeal meeting will be held by the incumbent and Wardens, and will normally be held within 10 working days of receiving the request or as soon as reasonable possible. The right to be accompanied also applies in this instance. The decision and the reasons will be communicated in writing. If rejecting the appeal, the decision must confirm the retirement date (unless this has already occurred).
 - 9 Where the request has been approved a review date should be agreed between the manager and the individual at the time the extension was granted. No other specific 'reviews' should be put in place (other than normal performance reviews).
 - 10 This procedure must be followed each time a member of staff nears an extended point for retirement (where a date has been set).
 - 11 As long as Christ Church follows this procedure correctly, it may rely on its normal retirement age without dismissal being regarded as unfair or age discriminatory. However, it is important to give careful consideration to the criteria applied as it could be open to other discrimination claims.
 - 12 Managers must note that health checks specifically for older workers, including those working beyond the Government's default retirement age 65 years and beyond, are **potentially** age-discriminatory. Therefore, an older worker must not be referred to Occupational Health solely on the basis of their age. Nevertheless, if there is a specific health concern in relation to employment, referral to Occupational Health, as for all other staff, is appropriate in line with Christ Church's procedures.

Appendix 2
Procedure for Working Beyond Christ Church's Normal Retirement Age of 70 Years



Appendix 3 – Standard Letters

Sample Letter 1 – informing a member of staff of a meeting to discuss a request to work beyond the age of 70

Enter name, home address

Date_____

Dear _____,

Following receipt of your request not to be retired, I am writing to inform you that a meeting has been arranged to discuss your request.

The meeting will be held on (insert date) at (insert time) at (insert location).

You have a right to be accompanied at the meeting. This person may be someone that you have chosen and they must be a member of Christ Church. They can address the meeting but not answer questions on your behalf, although you may confer with them during the meeting.

You will be informed in writing of the decision whether or not you can continue your employment beyond your retirement date of (insert date).

Yours sincerely

Manager's signature
(and print name)
Telephone number

NB: Your contact of employment will remain the same unless there are mutually agreed changes to your previous working pattern in which case it will be amended accordingly.

Sample letter 2 – to confirm retirement on the intended date

Enter name, home address

Date_____

Dear_____,

Following our meeting held on (insert date), Christ Church has considered your request to work beyond the age of 70 and the points put forward by yourself and your representative (if appropriate).

I wish to advise that, unfortunately, Christ Church has decided not to agree to your request for the following reasons (insert reasons). Therefore your retirement date remains as (insert intended retirement date).

You have the right to appeal this decision. If you wish to appeal, you must inform The operations Manager in writing within 10 working days after receiving notification of the decision. Failure to do so may mean that you lose the right to an appeal meeting.

You have a right to be accompanied at the appeal meeting. This person may be someone that you have chosen and they must be a member of the congregation. They can address the meeting but not answer questions on your behalf, although you may confer with them during the meeting.

Yours sincerely

Manager's signature
(and print name)
Telephone number

Note to Managers – if the employee does not appeal and retires on the above date, you should send them a letter thanking them for their service etc.

Sample letter 3 – to confirm their request to work beyond 70.

Enter name, home address

Date _____

Dear _____,

Following our meeting held on (insert date), Christ Church has considered your request to work beyond the age of 70 and would advise that your request has been agreed and will be reviewed again on (insert date).

Yours sincerely

Manager's signature
(and print name)
Telephone number

Sample letter 4 – acknowledge receipt of appeal letter

Enter name, home address

Date _____

Dear _____,

I wish to acknowledge receipt of your letter dated (insert date) in relation to your request to work beyond the age of 70 which has been passed to me for consideration. I wish to advise that an appeal meeting has been arranged for (insert date) at (insert time) at (insert location).

You have a right to be accompanied at the appeal meeting. This person may be someone that you have chosen and they must be a member of the congregation. They can address the meeting but not answer questions on your behalf, although you may confer with them during the meeting.

You will be informed in writing of the decision of whether or not you can continue your employment beyond your retirement date of (insert date).

Yours sincerely

PCC signature
(and print name)
Telephone number

Sample letter 5 – notifying a member of staff of the outcome of their appeal (where the appeal has been unsuccessful)

Enter name, home address

Date_____

Dear _____,

I refer to our meeting on (insert date) to discuss your appeal regarding your request to work beyond the age of 70.

Christ Church has considered your request and the points put forward by yourself and your representative (if appropriate) and I wish to advise that the appeal panel has decided not to agree to your request for the following reasons <insert reasons>. Therefore your retirement date remains as (insert intended retirement date).

On behalf of Christ Church, I would like to express our appreciation for your service over the years, and ask you to accept our best wishes for a long and happy retirement.

Yours sincerely

PCC signature
(and print name)
Telephone number

Sample letter 6 – to a member of staff to confirm a new retirement date (either following first meeting or appeal)

Enter name, home address

Date _____

Dear _____,

I am writing to inform you that, following our meeting to consider your request not to be retired/appeal meeting (delete as appropriate), Christ Church has agreed that your new intended retirement date shall be (insert date where appropriate).

Yours sincerely

Manager's signature
(and print name)
Telephone number

Christ Church Ware

**APPLICATION TO WORK
BEYOND THE AGE OF 70 YEARS**

Section 1 – To be completed by the applicant

PERSONAL DETAILS

Name (in full)	Title (Dr/Mr/Mrs/Miss/Ms etc):
Home Address	Date of Birth

CURRENT EMPLOYMENT DETAILS

Grade	Job Title
Staff Number	Name of immediate Line Manager
Department	Home Address

I hereby confirm that I have read and understand Christ Church's policy on Working Beyond Age 70. I also understand that it is recommended I seek guidance from the HPSS Superannuation Branch and / or independent Financial Advice in relation to any potential effects this may have on my future pension entitlements.

Signature of applicant: _____ **Date:** _____

Please pass this application to the Operations Manager

Section 2 – To be completed by the Operations Manager

I have examined this application and I support/do not support it for the following reasons:

Operations Manager's signature: _____ **Date:** _____

Please pass to the PCC.

Section 3 – Approval of the PCC

We support the recommendations as stated: Yes | No

Comments

Signed: _____ **Date:** _____

This application is to be reviewed on: _____