



Retirement Policy (No Fixed Retirement Age)

Version: 2

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The Sovereign Trust is a Multi Academy Trust registered in England No. 09666511. Registered Office: Manor Academy, Sale M33 5JX



Document Control

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Version History

Next Review Date		01/02/2026		
Version	Date	Amendments	Author	Status
0.1 To 0.4	Oct 2021 to Oct 2022	Initial Draft – Reviewed by the HR Team & the Trust Board. Consultation Process – Draft shared with the working group consisting of Senior Leaders, HR, and the Trade Unions.	Lisa-Marie McGrath	Consulted & reviewed, and implemented agreed points
1.0	01/12/2022	Final Draft – Approved by the CEO and The Trust Board	Lisa-Marie McGrath	Approved
2.0	01/02/2024	N/A	Lisa-Marie Flynn	Approved
3.0	01/02/2025	N/A	Lisa-Marie Flynn	Approved

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1. ABOUT THIS POLICY

- 1.1 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 employees because of age and adhere to the principles set out in our Equal Opportunities Policy.
- 1.2 We have no fixed retirement age. We acknowledge that retirement should be a matter of choice for individuals and will not pressurise employees into resigning because they have reached or are approaching a certain age. However, we will review whether a fixed retirement age may become necessary for particular roles from time to time.
- 1.3 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.
- 1.4 This policy applies to all employees. However, it does not apply to agency workers, consultants, or self-employed contractors.

2. PERSONNEL RESPONSIBLE FOR THIS POLICY

- 2.1 Our board of directors (the board) has overall responsibility for the effective operation of this policy but has delegated day-to-day responsibility for overseeing its implementation to the Trust's HR Manager.
- 2.2 Line Managers/SLT have a specific responsibility to ensure the fair application of this policy, and all members of staff are responsible for supporting colleagues and ensuring its success.

3. DISCUSSING YOUR FUTURE PLANS

- 3.1 You or your Line Manager/SLT 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 stop working altogether. We need to plan for the business, so may indicate to staff 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.
- 3.2 We will not make generalised assumptions that performance will decline with age, whether due to competence or health issues. However, if we think there are problems with your performance or ill health, these will be dealt with in the usual way, through the Capability Procedure or Sickness Absence Policy which are available from the HR Department.
- 3.3 During any workplace discussion:

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

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

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

3.6 If you express an interest in moving to a more flexible working pattern or changing role, we will confirm that this is what you want before any action is taken which could affect your employment, such as a change to your role or responsibilities. Alternatively, you may wish to make a request to change your working arrangements under our Flexible Working Policy.

4. GIVING NOTICE OF RETIREMENT

4.1 If you have decided to retire, we would appreciate as much notice as possible, although you should give at least as much notice as you are required to give under your contract of employment.