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## COUNTESS OF CHESTER HOSPITAL NHS FOUNDATION TRUST

### PROMOTING A CULTURE THAT SUPPORTS FLEXIBLE RETIREMENT

This case study outlines the trust's approach to promoting a culture where flexible working is key to an effective workforce and staff are supported to consider a range of options when approaching retirement.

### Background

Martin Godfrey is an HR business partner at the Countess of Chester Hospital NHS Foundation Trust, which provides its services from a 600-bed district general hospital and a 64-bed intermediate care service at Ellesmere Port Hospital.


The trust has approximately 4,000 staff and 750 registered bank workers providing a range of medical services to more than 445,000 patients a year from an area covering Western Cheshire, Ellesmere Port, Neston and North Wales.

### Retirement policy

The trust has a comprehensive retirement policy that encourages staff to consider the transition from work to retirement, and outlines the range of options available to them (some options are not available in certain sections of the scheme).

Taking into consideration the needs of the service and its patients, the trust supports a proactive conversation between members of staff and their line manager to consider the following approaches to retirement:

- **Wind down** – to defer retirement and instead work part time.
- **Draw down** – to draw down between 20 and 80 per cent of their pension earned to date following a reduction in pensionable pay of at least 10 per cent.
- **Step down** – to defer retirement and instead, take up a less demanding role on a lower pay band.

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- **Retire and return** – to retire from service and following an agreed break, return to NHS employment.
  - **Working when needed** – to retire and return to work without the need to commit to regular hours by joining the bank.
  - **Early retirement on the grounds of ill-health** – if a staff member becomes permanently incapable of performing their current job role due to ill health, they may apply for ill-health retirement.

The policy is open to all employees in the NHS Pension Scheme, including medical and dental staff. Employees are encouraged to consider their retirement at different stages throughout their career and not simply when approaching their normal pension age. The retirement policy promotes ongoing discussions, including during an employee's annual appraisal, related to business needs and workforce succession planning. The trust encourages staff to make their manager aware if they are uncomfortable discussing any aspects.

Key principles of the retirement policy:

- To consider as far as possible both the needs of individual employees, and the needs of the service.
- To allow sufficient flexibility in terms of the options for retirement to accommodate the needs of the service and the individual.
- To provide guidance so that managers are aware of the options that are available and the ability of the individual to make choices about the way in which they wish to approach retirement.

## Flexible retirement requests

The main request the trust receives is from employees wishing to retire and return to NHS employment. Requests are also received from employees who wish to wind down. The number of enquiries received differs between departments, wherever possible a consistent approach is taken in assessing all requests, however this is balanced against the needs of the service. In recent years the trust has seen a real shift in general to part-time working which has brought benefits for both individuals and the trust.

Requests are seen from a wide range of individuals throughout the pay bands and are not restricted to one type of employee. Many requests involve the individual returning to work either part time or joining the internal bank.

Requests are assessed on an individual basis, and the trust always asks the question, 'why wouldn't I?' Line managers are encouraged to consider how requests for flexible retirement can benefit the team, and to take the opportunity to assess what resources they really need for patient services, rather than just replace like for like. Managers are supported by the HR department and may attend one to one support sessions with a member of the HR team to discuss any requests.

The trust view is that adapting to the needs of the workforce and supporting the changing profile of the workforce are key to achieving an effective workforce.

## Promoting healthy lifestyles

In order to retain an effective workforce, the health and wellbeing of employees is very important. The trust promotes health and wellbeing through a variety of approaches including the adoption of a health and wellbeing strategy, which is fully supported by the board, healthy lifestyle events, Schwartz rounds and resilience education. These sessions are open to all employees and they provide an opportunity for staff to consider their lifestyle choices and other options available to them.

There is also an opportunity at the sessions for employees to consider their future career and any retirement plans they may have. The sessions include guidance from payroll, pensions and HR support and are well attended. The trust is also seeing an increasing demand for these services, which is being managed by the HR team.

## Working with staff side

The HR team has monthly meetings with local staff side representatives and these are a good opportunity to consider both the needs of the trust and its employees. Working in partnership provides a consistent approach to policies and allows employees to seek support from both management and staff side representatives if they wish to do so.



"Healthy lifestyle workshops are popular with staff from all departments"



## Helpful tips

- Incorporate flexible retirement into your workforce planning.
- Develop a comprehensive policy readily accessible for all employees and managers.
- Encourage staff to attend information sessions and workshops designed to support their career decisions.
- Incorporate flexible retirement options into general discussions including annual appraisals.
- Support line managers to use flexible retirement to meet their workforce needs.

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