



Leaving Exceed Learning Partnership Policy

Author/Owner	Jude Hall, HR Manager
Version Number	6
Date Approved/Reviewed	November 2023
Date of Next Review	September 2025
Approved By	Finance and Operations Committee

Policy Category (Please Indicate)	1	Academy to implement without amendment
	2	Academy specific appendices
	3	Academy personalisation required (in highlighted fields)



Summary of Changes from Previous Version

Version	Date	Author	Summary of Updates
V6	November 2023	HR	Policy placed onto new format and includes appendices for exit questionnaire

Contents

Contents	2
1. Introduction	4
2. Resignation.....	4
3. Redundancy.....	4
4. Retirement	5
5. Early Release of Pension Benefits	5
NJC Staff.....	5
Early Retirement on the grounds of Redundancy	6
Early Retirement under the Pension Efficiency Criteria	6
Early Retirement under Pension Regulation 30 - (Employer Consent Retirement)	7
Actuarially Adjusted Benefits (AAB) on Retirement for Teaching Staff	7
Early (premature) Retirement on the grounds of Redundancy or Efficiency	7
6. Flexible/Phased Retirement	8
For NJC Staff	8
For Teaching Staff	9
Pay in Lieu of Notice.....	9
7. Early Release of Pension Benefits on Ill Health Grounds	9
Ill Health Retirement	9
For Support Staff.....	10
Preserved Pension Benefits	11
For Teaching Staff	11
Other criteria to consider	12
8. Working Beyond Retirement Age	12
9. Pensions.....	13
Internal Dispute Resolution Procedure (IDRP)	13
Pension Transfers.....	13
Augmentation of Pension Benefits for Active Members of the LGPS	13



Awarding of Additional Pension	13
Further Advice and Information	13
10. Exit Questionnaire / Interview	14
Appendix 1 Employee termination Checklist	15



1. Introduction

This document provides guidance and options to facilitate and inform decisions for employees and the Trust management for staff leaving employment of the Exceed Learning Partnership (referred to as Trust) or any of its academies.

- The procedure applies to all employees employed by the Trust and either working in the Trust Central Team or one of its academies
- There are a number of ways that employees may wish to leave the Trust, as outlined in this document.

2. Resignation

An employee may resign at any time, giving proper notice, under the contract of employment.

- The Local Government Terms and Conditions of Employment, as adopted by the Trust for support staff, sets out the guidance for notice periods for support employees who are leaving their employment with the Trust.
- The Conditions of Service for Academy Teachers in England and Wales (Burgundy Book) sets out the guidance for notice periods for CEO/Principals and Teachers leaving the Trust.

If any employee resigns, the manager should explore the reason for leaving. Departing employees will be encouraged by the Trust to undertake exit questionnaires and managers to conduct exit interviews. This offers the Trust and its academies the opportunity to examine current practices that may be contributing to the loss of employees.

3. Redundancy

Trusts are continually faced with challenges to provide and improve on delivering good quality education and business operation, sometimes with less resources. To be able to achieve this, managers are required to think of innovative and creative ways of utilising the resources that they have. The resources include the employees that they have, how jobs are designed and the costs involved in running the Trust and its academies.

As a result of the Trust adapting to changes, employees may find themselves as being in a redundancy situation.

- The Trust will consider the affordability of awaiting natural wastage before invoking any redundancy situation.
- If any change ultimately results in a redundancy situation the Trust would, in the first instance, ask for expressions of interest from employees to volunteer for redundancy, in order to avoid any compulsory redundancy situations wherever possible. Compulsory redundancies have more of a negative impact upon staff morale and general employee relations.
- In a redundancy situation the employee will have the following employment rights;
 - after two years' continuous service employees will be entitled to a redundancy payment, if no suitable alternative employment has been identified
 - Section 135 of the employment Rights Act 1996 requires an employer to make a redundancy payment to an employee where that employee is dismissed by reason of redundancy

<https://www.gov.uk/redundant-your-rights/redundancy-pay>. The Trust uses that statutory redundancy pay scheme. The statutory scheme gives an entitlement to a redundancy payment which varies with length of service as follows:

- half a week's pay for each completed year of service under the age of 22
 - one week's pay for each year of completed service between the ages of 22 and 40 inclusive
 - one and a half weeks' pay for each completed year of service after reaching the age of 41
 - Length of service is capped at 20 years.
- In accordance with the Employment Rights Act 1996, an employee who is dismissed shall be taken to be dismissed by reason of redundancy if the dismissal is, amongst other reasons, wholly or mainly attributable to, the fact that the requirements of that business for employees to carry out work of a particular kind have ceased or diminished or are expected to cease or diminish.
 - Redundancy is a dismissal in law and for redundancy to be a fair reason for dismissal, a redundancy situation, as defined in the Employment Rights Act 1996, must apply and a fair procedure must be followed. This includes a fair selection procedure, individual and union consultation and consideration of suitable alternative employment.

4. Retirement

As from October 2011 the default retirement age was removed and therefore there is no fixed retirement age within the Trust.

- NJC staff - to access pension benefits, the normal retirement age to access the Local Government Pension benefits is dependent on individual member's circumstances, such as when you joined the scheme, however you can retire from age 60 and access your pension (with any applicable actuarial reduction) without the consent of the Trust /Academy.
- Teaching staff - the Normal Pension Age for a teacher largely depends on whether they joined the scheme before 1 January 2007. If they did, their Normal Pensionable Age (NPA) is 60. If they joined on or after 1 January 2007 their NPA is 65.

5. Early Release of Pension Benefits

NJC Staff

- There may be times where an employee may wish to leave their employment between the age of 55 and 60 and by doing this the employee will suffer a reduction of pension benefits.
- If you are considering early retirement from age 55 onwards, you should first contact South Yorkshire Pensions for a retirement estimate, as benefits will (subject to the 85-year rule) be reduced to consider early payment. *Please note voluntary retirement between age 55 and 59 inclusive is a new scheme facility and the rule of 85 protections will not automatically apply in full.
- The Pension regulations allow employers to "Switching on the 85-year rule" for members voluntarily drawing benefits on or after age 55 and before age 60. The Trust can agree to apply the 85 year rule, however, because of the potential retrospective impact on the Fund Valuation and future additional costs that the

exercise of this discretion would bring to the Trust, and the fact that the Trust does not deem the exercise to be necessary in pursuit of its overall business plan and strategy, then, it is not anticipated that there will be any instances where the Trust will switch the rule of 85 on for staff members wishing to retire voluntarily between the ages 55 to 60. However, every application will be considered on its own individual merits and the circumstances involved.

- From age 60 an employee can elect to retire and therefore, access their accrued pension benefits early. Again, employees should note that their benefits may be subject to reductions when accessed before their normal retirement age.

Early Retirement on the grounds of Redundancy

- When the Trust is considering changes to the organisation structure it may be deemed necessary to reduce the number of posts or change posts to meet the needs of the Trust. In this circumstance there may be employees who volunteer to take early retirement on the grounds of redundancy (VER).
- Whether it is retirement on a voluntary or compulsory redundancy basis, employees who are made redundant from age 55 or over, with three months' membership or have transferred pension rights of any length into the LGPS from another scheme they will be entitled to the immediate unreduced payment of Local Government Pension Scheme benefits.

Early Retirement under the Pension Efficiency Criteria

- Some early retirements are not sustainable by reason of redundancy and therefore the employee would not be eligible for a redundancy payment, but nevertheless the retirement would be in the interests of all parties.
- An employee could retire in the interests of efficiency of the Trust from age 55. Efficiency retirements may be considered at the Trust's discretion, in the following circumstances, either:
 - The employee is unable to cope with or implement changes required by management in working methods and practices without causing employee or industrial relations difficulties
 - or
 - Whilst instances of ill health should normally be dealt with using the Trust's Managing Attendance Policy, ill health retirement or early release of pension benefits under regulation 30 of the Local Government pension regulations amendments 2007, there are instances when the health of an individual may affect their performance but may not result in sickness absence invoking any of the above. Where the employee's performance is affected by their health, retirement in the efficiency of the service could be considered
- Employees qualify for an immediate pension if they are retired early in the interest of the efficiency of the service and are aged 55 or over with three months' membership or have transferred pension rights of any length into the LGPS from another scheme.
- Before supporting early retirement under the efficiency criteria, the Trust must consider the costs of releasing the employee's pension benefit early in comparison to other options or costs to improve the efficiency of the Trust. For example, the cost and feasibility of providing further training and support for an employee who is unable to cope with the workplace changes; or whether an employee has skills that could be utilised in other areas of work and then consideration could be given as to whether it is feasible to re-deploy the staff member.



Early Retirement under Pension Regulation 30 - (Employer Consent Retirement)

There may be times where an employee may wish to leave their employment between the age of 55 and 60 and by doing this the employee will suffer a reduction of pension benefits. Because of additional costs involved to the Trust/Academy of waiving the actuarial reduction to member benefits it is not envisaged that the Trust would normally exercise its discretion in favour of waiving those reductions.

The Trust will consider each case on its merits and with reference to the circumstances involved of the individual concerned. A potential example of this policy would be where the individual can make a case for the waiving of such reduction on compassionate grounds (Regulation 30 Retirement). An example of compassionate grounds may be where the employee has been forced to cease work to take up caring for an immediate family member, although it is recognised that other grounds could and may exist.

As there is a cost for early release of pension benefits on these grounds the employee **MUST** be given employer's consent.

Actuarially Adjusted Benefits (AAB) on Retirement for Teaching Staff

If a teacher is 55 or over, with pensionable or excluded employment (This is teaching employment which would have been pensionable but for an election to opt-out of the scheme – or the absence of a part-time election prior to 1 January 2007) on or after 30 March 2000, they can ask to access their retirement benefits before their Normal Pensionable Age. The benefits will be actuarially adjusted permanently, although the pension will attract index linking.

- The teacher must obtain consent from the Trust if they wish to retire early. The academy cannot withhold consent for more than six months from the date on which permission is requested, however before AAB retirement benefits can be paid the teacher must cease all teaching employment.
- In the case of supply teachers, their contract must have ended. A non-working day will not be considered as a break in service.
- If a teacher applies having left teaching but then returns to teaching service before the nominated payable date then the application is void.

Early (premature) Retirement on the grounds of Redundancy or Efficiency

- Whether it is retirement on a voluntary or compulsory redundancy basis, Teachers who are made redundant from age 55, will be entitled to the immediate payment of their Teachers' Pension benefits. The Trust/academy is legally obliged to pay a redundancy payment. The Teachers' Pension Scheme will pay an actuarially adjusted pension and lump sum based upon the teacher's pensionable service.
- It is at the Trust's discretion that they do not award principals/teachers aged over 55 whose employment has terminated on the grounds of redundancy or organisational efficiency unreduced premature retirement benefits.
- Premature retirement is not an option if the person is employed on a fixed-term contract. And the teacher must stop all teaching work before premature retirement benefits can be paid. If they're supply teachers, their contract must have ended. (Note: a non-working day is not a break in service.)



6. Flexible/Phased Retirement

For NJC Staff

The Trust seeks to support the principle of allowing members to prepare for retirement in as many ways as possible. Flexible retirement is an approach to part-time/flexible working which helps to prepare employees for retirement. Written within the Pension Regulations, employees aged 55 and over can either request a reduction in working hours or can apply for a lower graded post, and at the same time receive part or all of their accrued pension benefits.

- The Trust also seeks to support Government Policy where that policy supports the Trust in its efforts to run in the most efficient and cost-effective manner. As such, subject to the following criteria, the Trust would normally expect to exercise its discretion in allowing staff members to retire flexibly:
 - any reduction in working hours or salary must be permanent;
 - any reduction in working hours or salary must be at least 40% of those hours or that salary being worked or earned immediately prior to the staff member's flexible retirement;
 - the reduction in hours or reduction in responsibility allowing the staff member to be paid a reduced salary must not impact upon the Trust's ability to carry out its business efficiently and effectively;
 - the individual flexible retirement concerned must support the Trust's overall business plan and strategy.

The Trust reserves the right having considered each individual case, to refuse an application where any of the above criteria are not met.

- There is a duty on the Trust to consider flexible working/retirement requests seriously. An employee must seek approval from the Trust/Academy if they wish to reduce their hours of work under the principles of Flexible Working. The responsibility is on the employee to prepare a carefully thought-out application well in advance of when they would like the desired working pattern to start. To make a formal request the employee must put the request in writing to the COO (For Trust Central Team staff) or the Principal for staff working in academies. The Trust's consent is required both in terms of reducing hours, i.e. for consideration of issues related to flexible working, and releasing pension benefits as there are costs associated with releasing benefits early.
- If an employee has been granted approval for reduced hours or they have sought employment at a lower grade then under the revised pension regulations, they have the option to apply for their accrued pension benefits at the time that they reduce their hours and/or move to a lower graded post. It is advisable that employees contact South Yorkshire Pensions Authority prior to the written application to ensure they are aware of all implications to their pension fund.
- The Trust will consider all applications on a case by case basis and establish whether the request can be accommodated within the needs of the service. The following may be points to consider before reaching a decision:
 - Whether the costs for the early release of the employee's pension are affordable within their budget
 - Whether there is there a need to fill the vacant hours or can the service be delivered effectively without filling them
 - If there is a requirement to fill the vacated hours how easy will it be to recruit to the post. In some cases, would it be appropriate to try and recruit to the vacated hours prior to giving a final decision



to the employee making a flexible retirement application. Alternatively, it may be possible to agree the flexible retirement subject to the filling of the resultant vacancy arising from the vacated hours

- If part time/flexible working is requested managers have to consider the extra costs of induction, training and administration of appointing people to part time posts or the remaining hours vacated by an employee
- Should the employee be granted flexible retirement and therefore early access to their pension benefits; their pension will be paid the actuarial reductions will not be waived by the Trust. At the same time, the employee will automatically be brought back into the pension scheme and begin making contributions on their new salary/hours. Should they not wish to make pension contributions under these circumstances, then the employee must write to the Pensions Section notifying them that they wish to opt out of the scheme.
- When considering applications for flexible retirement, both the employee and the Trust should take advice from South Yorkshire Pensions. There may be implications for the employee's pension benefit when accessing their pension early and for the Trust there may be the potential financial implications which have to be considered.
- Any changes to the contract of employment (i.e. reduction in hours) are considered to be a permanent change and will only be reviewed if there is considered to be a genuine business reason.

For Teaching Staff

- Teachers may want to continue working while drawing some of their accrued pension benefits. To allow for pension to be paid for a phased/flexible retirement, the teacher's Pensionable Salary (i.e. the salary on which they pay pension contributions) must reduce by at least 20% for a minimum of 12 months following the date of retirement. For example, this could be because their hours have been adjusted, or they've taken up a post of lesser responsibility.
- The application form for phased retirement must be signed by the employer responsible for the new working arrangement and must be made within three months of the teacher taking up employment.

Pay in Lieu of Notice

All employees who retire on the grounds of redundancy or in the interests of efficiency of the service should be given and be required to work their contractual period of notice. Pay in lieu of notice will not be given unless there is a specific legal requirement or unless there is a specific identified benefit to the Trust.

7. Early Release of Pension Benefits on Ill Health Grounds

Ill Health Retirement

If an employee is experiencing long-term problems with their health the Trust/Academy may have to consider the impact that this has not only on the employee but also on the work place. Regular or long-term absences can have an impact upon the education of children and upon the remaining employees who are still in work. When an employee is too ill to do their job consideration will be made in the first instance to making any adjustments in the work place to accommodate the employee, however consideration must always be given to the practicability of any adjustments to the employee's post in line with safe working practices.

If an employee has to leave work at any age due to permanent ill health, the Teachers' Pension Scheme (TPS) provides a two-tiered ill health retirement package and the LG Pension Scheme provides a three-tiered ill health retirement package. This could give an employee increased benefits, paid straight away, if they are unlikely to be



capable of gainful employment within a reasonable time after leaving the Trust/Academy. The employee and/or their trade union representative may have views about the ill health retirement process but the decision to pursue an application for retirement on the grounds of ill health is the employers alone. It should also be noted that in order to process an application for ill health retirement employment must be terminated on medical grounds with supporting medical information. If employment comes to an end for any other reason then, it is not possible to make an application for ill health retirement.

For Support Staff

To qualify for ill health benefits, the Trust, based upon an opinion from an independent specially qualified doctor, must be satisfied that the employee meets two criteria: firstly, that they are permanently incapable of performing the duties of their own job (permanent means at least until their normal retirement); and secondly, that they are incapable of taking up gainful employment immediately (gainful employment means any job for more than 30 hours per week over a period of 12 months). If both of these criteria are satisfied, then the independent doctor will make a recommendation about which tier they should be allocated to. There are three possible tiers:

- Tier 1 – the individual is not considered to be able to take up gainful employment before normal retirement age.

This tier attracts the maximum level of benefit for members who are unlikely to be able to work 30 hours per week in any capacity every again. Pension benefits payable are based on the membership the individual would have achieved had they carried on working until their normal retirement age.

- Tier 2 – the individual is capable of taking up gainful employment between three years and their normal retirement age.

This tier applies to individuals who are not fit enough to take up gainful employment within three years but would be able to do so before they reach their normal retirement age. Pension benefits payable are based on the individual's membership to the date of retirement plus 25% of the period from that date until their normal retirement age.

- Tier 3 – the individual will be capable of taking up gainful employment within three years.

This tier attracts the lowest level of benefit for individuals who are assessed as not being capable of undertaking gainful employment immediately but, who are assessed as being able to, within a period of three years. Pension benefits paid at this tier are payable for a maximum of three years and the individual is subject to a medical review after 18 months. Following the review pension benefits could continue to be paid for a further 18 months, they could be stopped if health has improved or they could be upgraded to tier 2 if health has worsened.

- Once the medical recommendation has been provided the decision about whether to approve retirement on the grounds of ill health is down to the employer.

The CEO/Principal will be responsible for making the final decision about whether or not to approve the application. (Note – HR advice must be sought prior to making an application and prior to confirming any decision.) Any decision which deviates from the medical recommendation will require sound auditable reasons to be documented.

- Individuals who have multiple posts will have to be assessed separately for each job. Depending on the health condition the individual's ability to perform the tasks in different jobs could vary greatly. It is possible that an individual could be granted ill health retirement from one job but not another.
- It is possible to accelerate the procedure for applying for ill health retirement for any individual diagnosed with a life-threatening illness with a short life expectancy. HR will provide advice on this.



- The cost of any medical reports required during the assessment procedure will be met by the Trust or individual Academy.

Preserved Pension Benefits

- Any individual who left the pension scheme before their normal retirement age and has more than 3 months' membership will have a preserved benefit. Preserved benefits are paid at normal retirement age but there is a provision for them to be paid early either if an individual becomes ill and satisfies the rules of the pension scheme or falls within the requirements of Regulation 30 being within the age range of 55 and 60.
- Under Regulation 30 of the Pension Regulations, the employee can also request that the actuarial reduction to their preserved benefit is waived on compassionate grounds. The Trust has applied discretion that they will only agree to waive any actuarial reductions to the employee's benefits, where there are exceptional circumstances in that significant hardship would otherwise be caused. Each case will be considered on its own individual merits.
- In order to access a preserved benefit, the individual should apply, in writing, to their former employer asking for the pension benefits to be brought into payment. If the individual has multiple preserved benefits with the same employer, because they had multiple posts, they will need to indicate which they are applying for as each will have to be assessed separately. Individuals who wish to apply for access to a preserved pension benefit to the Trust, as their former employer, should write to the CEO.
- The amount of benefit payable is the current value of the preserved benefit at the date of payment. If an application is approved the date benefits are paid is usually the date on which the initial application is received by the former employer.
- It is possible to accelerate the procedure for applying for a preserved pension benefit on health grounds for any individual diagnosed with a life-threatening illness with a short life expectancy.
- The cost of any medical reports required during the assessment procedure must be met by the former employee.

For Teaching Staff

- For early release of pension for members of the TPS in relation to ill health, there are two different levels of ill health benefits that can be awarded:
- Accrued Benefits, are awarded if the teacher is assessed as being permanently unable to teach but can do other work. With Accrued Benefits a teacher's service will not be enhanced.
- Total Incapacity Benefits (TIB), are awarded if the teacher is assessed as being unable to undertake any type of gainful employment. With TIB, their service will be enhanced. A teacher must apply for TIB within six months of either leaving pensionable employment, or ceasing the payment of 'Combined contributions' to be eligible. If a teacher has been on a period of sick leave, maternity, paternity, parental or adoption leave, or a career break which immediately followed a period of pensionable employment, the application must be made before the sick leave or period of absence ends.
- The cost of any medical reports required during the assessment procedure will be met by the Trust or individual academy.
- If the teacher doesn't apply for ill health benefits within these timescales, an application for ill health benefits can still be made, but the deferred teacher has to meet the TIB criteria of not being able to undertake any gainful employment. In this case, the service used will not be enhanced (i.e. Accrued Benefits will be paid).
- The teacher has to submit the application to the academy in the first instance (see www.teacherpensions.co.uk). Once the application is certified it is sent with the medical evidence to the TPS.

Where the teacher left the academy more than 12 months ago, the teacher should send the documents directly to TPS themselves. For teachers who have left the academy, the cost of any medical reports required during the assessment procedure will be met by the individual.

- Where the medical evidence form has been completed by a specialist or a GP, it should be sent to the Academy/Trust's Occupational Health Advisor, along with any supporting documents. They will then assess it before it is forwarded to the TPS, as the TPS cannot obtain any medical reports on the applicant's behalf.
- The Trust and the teacher will be told in writing whether or not an application is accepted. There are two ways to deal with this:
 - If the application has been accepted, and the teacher is still actively teaching the academy must arrange for this to cease immediately.
 - If the application has been rejected, the teacher has the right to appeal and should follow the appeal process. Details of this will be sent by the TPS to the teacher with the rejection letter

Other criteria to consider

The teacher must not have applied for phased retirement, premature retirement or 'Actuarially Adjusted' benefits in respect of the same period of employment. However, if any of these have been awarded in respect of an earlier period of service, and a teacher who has subsequently taken up further pensionable teaching employment later suffers a breakdown in health, the teacher can apply for ill health benefits for the later period of service. In all circumstances the teacher must have completed the appropriate retirement qualification periods.

8. Working Beyond Retirement Age

- As from October 2011 there is no longer a default retirement age of 65 at the Trust/Academy. However, when you get to your normal retirement age employees can still choose to retire and therefore access their unreduced pension benefits. Upon reaching your normal retirement age an employee will not automatically receive their accrued pension benefits if they continue to work unless they make a request to either reduce their hours of work or move to a lower graded post under Flexible Retirement.
- If an employee chooses to carry on working after normal retirement age there is an option to continue to pay into the Local Government Pension Scheme (LGPS), and the Teachers' Pension Scheme (TPS), in order to build up further benefits. The LGPS and TPS will pay out the pension upon retirement, or when an employee reaches the eve of their 75th birthday, or if they take flexible retirement with the Trust's consent, whichever occurs first. If an employee draws their pension after normal retirement age, it will be increased in line with factors issued by the Government Actuaries Department. The LGPS pension has to be paid to an employee before reaching their 75th birthday. (It is recommended that employees contact a pension's adviser in all cases)
- If an employee does work beyond their normal retirement age and their post is made at risk of redundancy, the employee would be entitled to the same rights as all Trust/Academy employees.



9. Pensions

Internal Dispute Resolution Procedure (IDRP)

The Internal Dispute Resolution Procedure (IDRP) is a mechanism by which individuals can dispute any decision that has been made in relation to the pension scheme. The first step is to complain to whoever the individual feels is at fault, either the employer or South Yorkshire Pensions Authority (SYPA) or the Teachers' Pensions Service (TPS). This procedure can be used by a pension scheme member, a prospective pension scheme member, or the dependent of a pension scheme member or prospective member. For details of how to make a claim under the IDRP please refer to the appropriate factsheet called 'Internal Dispute Resolution Procedure'.

Pension Transfers

With effect from 1 June 2004 the Pension Scheme Regulations introduced a requirement that any pension scheme member who wished either to, combine separate pension benefits within the local government pension scheme or Teachers pension scheme or, transfer in pension benefit accrued in another occupational pension scheme or personal pension arrangement, had to do so before the expiry of 12 months beginning with the date they became an active pension scheme member. The Trust/Academy will not accept late transfers beyond the 12-month period.

Augmentation of Pension Benefits for Active Members of the LGPS

This is a discretion afforded to employers by the pension scheme regulations and involves the payment of an amount of money into an employee's pension. The Trust/Academy will not exercise its discretion to augment an employee's membership unless there is considered to be a specific advantage to the employer in doing so. Any cases will be assessed on an individual basis and will include consideration of actuarial costs and equity of application. It is not possible to augment preserved benefits.

Awarding of Additional Pension

This is a discretion afforded to employers by the pension scheme regulations and involves the employer being able to award additional year(s) of membership. Because of the costs involved and the likelihood of this provision either being of little or no benefit to the Trust/Academy, or not being vital to the support and application of the Trust's business plan and strategy, then the organisation would not normally expect to exercise its discretion to award additional pension to members. However, each and every application will be considered in the light of the circumstances of the individual case concerned and a decision reached on the merits of that case.

Further Advice and Information

For any of the options under consideration, which relate to the release of an employee's pension it is recommended that employees discuss their circumstances with South Yorkshire Pensions or the Teachers' Pensions to ensure they are aware of the impact upon their own pension benefits.

For further information regarding local government pensions contact:

South Yorkshire Pensions on 0300 303 6160

www.sypensions.org.uk

www.lge.gov.uk

For further information regarding Teachers' Pensions

0345 6066166

tpmail@teacherspensions.co.uk

www.teacherspensions.co.uk

Teachers' retirement application forms can be found on the secure area of the TPS website, My Pension Online

10. Exit Questionnaire / Interview

The use of exit questionnaire and interviews are applicable to the following categories of employees:

- Employees who are due to leave following their resignation
- Employees who are due to retire including ill health retirement and retirement in the interests of the efficiency of the service

The above categories apply to full and part time permanent employees including job sharers as a minimum of 12 months.

Employees who are due to leave the academy or trust because of redundancy, dismissal (misconduct or gross misconduct), lack of capability, medical incapability or the academy trust inability to find suitable alternative employment under the redeployment procedure are excluded from the exit interview and exit questionnaire process.

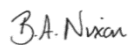
The exit interview is usually conducted by the immediate line manager or the Principal/CEO but can be conducted by the employee's preferred choice providing they are a member of the senior leadership team. A note of the interview will be made and signed by both the interviewer and the employee as a reasonable reflection of the employee's thoughts.

The exit interview should be booked in for a suitable time just before the employee leaves and the Employee Termination Checklist (appendix 1) form should be completed during the interview to ensure all equipment/keys/security badges are returned and signed back into the academy/trust.

Please refer to the management guidance for exit questionnaires and interviews – ELP Exit Interview and Questionnaire Guidance for Managers.

Policy Agreed: November 2023

Signed Chief Executive Officer:



Signed Chair of Directors:



Policy to be reviewed in September 2025



Appendix 1 Employee termination Checklist

Employee name		Academy base	
Termination date		Last day worked	
Reason For leaving			

Items Returned (enter n/a if not applicable)

Item returned	Received by	Date
Employee I.D Badge		
Laptop/computer		
iPad		
Mobile Phone		
Company Credit Card		
Keys to Building		
Keys to Safe		
Keys to filing cabinets etc		
Other		

Payroll: please identify if there are any outstanding payments i.e. additional hours not yet claimed

Area	Amount	Date
Additional hours outstanding		
Holiday days outstanding for payment (for FT NJC employees)		
Travel/mileage		

The following areas should be cancelled on the last day of employment or as soon after: -

- IT account ☐
- Staff Insurance ☐
- Subscriptions ☐
- Remote Learning Platform ☐



SIMS user account ☐
Salary sacrifice ☐
Single Central record ☐

Signed by Manager: _____ Date: _____

Signed by Employee leaving: _____ Date: _____