

Three Counties Academy Trust



Retirement Policy and Procedure

#HR8

Last amended 10th December 2025

To be reviewed no later than April 30th 2028

Statement of intent

This policy replaces the previous HR8 Pension Policy.

Three Counties Academy Trust (TCAT) is committed to supporting staff at all stages of their career and to promoting fair, transparent and respectful practices in relation to retirement. We recognise that retirement is a significant personal and professional milestone, and that individual circumstances, aspirations and financial considerations vary considerably. This Retirement Policy and Procedure sets out TCATs approach to managing retirement in a way that is consistent, lawful and supportive, while ensuring the effective operation of our schools.

TCAT values the experience, expertise and contribution of all staff, including those approaching or considering retirement. We are committed to complying fully with the Equality Act 2010, ensuring that no member of staff is treated less favourably on the grounds of age or any other protected characteristic. Decisions about retirement will never be based on assumptions about age or length of service. Instead, we will engage constructively with staff to support informed decision-making and effective workforce planning.

This policy applies to all TCAT staff who are members of the Teachers' Pension Scheme (TPS) or the Local Government Pension Scheme (LGPS). While we do not provide pensions advice, we will ensure that staff are signposted to the appropriate pension administrators and reliable sources of independent guidance, enabling them to understand their options and make well-informed choices.

We recognise that staff may wish to explore a range of options as they approach retirement, including phased retirement, flexible working, partial retirement (where permitted by the relevant scheme), or continued employment beyond a chosen or normal pension age. Where operationally feasible, TCAT will seek to consider such requests positively and in line with statutory obligations, business needs and the best interests of pupils.

In adopting this policy, TCAT aims to balance the needs of individuals with the strategic needs of the organisation, ensuring a smooth transition for staff and continuity for pupils. In doing so, we reaffirm our commitment to valuing our workforce, supporting wellbeing and maintaining a professional, inclusive and sustainable working environment across all TCAT schools.

To that effect, we subscribe to and promote the Retirement Policy and Procedure for all categories of school (HR008) as set out by our HR partners Hoople and used across the county of Herefordshire. The latest version of this policy will be the version used should the need arise.

The latest (HR008) Retirement Policy and Procedure for all categories of school can be obtained on request from the TCAT Central Team or from the Headteacher/Head of School and is the full and unabridged version as ratified by Hoople and adopted by the TCAT Trust Board.

Please note, where Hoople can at times have not ratified a new version of a policy before their planned review date, we will always use the latest version available, even where that may fall outside date scope until Hoople have approved a replacement.