



PHASED RETIREMENT POLICY

SCOPE

This policy applies to all mature age employees of WA Health, which incorporates the following entities:

- The Department of Health
- Metropolitan Health Services
- Peel Health Service
- WA Country Health Service.

Application: This policy applies to mature age employees (45 years and older).

This policy supersedes all policies related to phased retirement in WA Health. This policy is supported by the WA Health Phased Retirement Guidelines.

POLICY STATEMENT

WA Health is committed to creating a vibrant and positive workplace and maintaining a reputation as an 'Employer of Choice'. This is enabled by a system-wide workforce culture which is both healthy and sustainable and supports work life balance for all employees.

WA Health promotes flexible and responsive work practices that assist mature age employees to balance their work and personal life responsibilities and encourages a phased approach to retirement. Benefits to the organization of retaining mature age staff may include:

- increased staff retention
- retaining corporate knowledge
- providing mentorship for less experienced staff
- reduced absenteeism
- improved productivity and staff morale
- reduced work stress.

A collaborative and cooperative approach between managers and employees to negotiate phased retirement options will ensure that operational needs and individual employee's circumstances are met.

PRINCIPLES

1. The suitability of various flexible work practices for a phased retirement arrangement is dependent upon the needs of the work unit and type of work required of the position while taking into consideration employees' individual circumstances.
2. Managers and supervisors will inform mature age employees of the options for phased retirement and assist them, wherever reasonably practicable, in accessing flexible working arrangements.
3. When assessing requests for flexible work practices to phase into retirement, managers shall:
 - give prompt consideration to all requests
 - consult with the employee making the request
 - assess individual cases on merit
 - take into account the needs of the organisation and the employee's needs and circumstances
 - consider the impact of such arrangements on other employees directly affected
 - consider the specific employment conditions of the employee as provided in the relevant Award or Industrial Agreement.
4. The principles of fairness, equity, and natural justice shall apply to all decisions made regarding the approval and implementation of phased retirement arrangements. Decisions about requests for phased retirement arrangements shall be transparent and capable of review.
5. The phased retirement arrangement and conditions associated with it, agreed between the parties involved, must be appropriately documented. As with any flexible work practice, the arrangement should be monitored and reviewed on a regular basis.
6. As it is a requirement for all staff to have their performance managed on a regular basis, this will also apply to employees undertaking phased retirement options.
7. If a manager refuses an employee's request for a particular arrangement, the reason/s for this decision must be documented and fully explained to the employee. In such cases, the manager and employee will work towards an agreement on an alternative arrangement that is acceptable to both parties.
8. The local relevant grievance procedure is available to assist any employee who:
 - a) has made a request for a phased retirement arrangement and is not satisfied with the outcome
 - b) feels unduly disadvantaged because of another employee's phased retirement arrangement.
9. Phased retirement arrangements shall not adversely affect an employee's ongoing career or professional development opportunities. In particular, an employee who has entered into a phased retirement arrangement shall not be disadvantaged when applying for promotions or ongoing professional development opportunities.

10. Should an employee reduce their working hours as part of a phased retirement arrangement, the employee's workload will be reduced in proportion to the reduction in hours.
11. A phased retirement arrangement does not require a commitment to a retirement date, as the arrangement will facilitate a longer working life for the employee. However, the arrangement will be reviewed on an annual basis, and can be modified at any time by mutual agreement between the manager and employee.

DEFINITIONS

Flexible Work Practice

Work arrangements that are flexible to meet the needs of the employee, balanced with the needs of the organisation.

Mature age employee

Mature age employees are identified in the State Government's Mature Age Employment Strategy as employees who are 45 years and older.

Natural Justice and Procedural Fairness

Natural justice is about the concept of fairness, which can be described as 'justice should be done *and* be seen to be done'. In procedural terms, a decision maker must act in good faith and without bias and shall also grant a hearing to any person whose interests will be affected by the exercise of that decision before the decision is made.

The principles of procedural fairness are:

- Decision makers must act fairly and without bias;
- A person should not be judge in her/her own case;
- All parties to the matter should have the opportunity to have their case and all relevant arguments considered before a decision is made;
- All persons need to be informed of the basis of a decision, where that decision affects them.

Phased Retirement

Phased retirement is the phasing into retirement by a graduated reduction in working hours, working days or work load. This could include part time or job sharing working arrangements, purchased leave arrangements to provide more regular or longer periods of leave breaks, changing jobs, or stepping down from a managerial or supervisory role.

Work Life Balance

The balance between the demands of the employee's work and their personal life.

SUPPORTING DOCUMENTS

WA Health Phased Retirement Guidelines

RELEVANT LEGISLATION

- Public Sector Management Act 1994
- Industrial Relations Act (WA) 1979
- Minimum Conditions Employment Act 1993 (As amended)
- Workplace Relations Act 1996
- Long Service Leave Act 1958
- Equal Opportunity Act 1984
- Occupational Safety and Health Act 1984

For relevant legislation, go to:

<http://www.slp.wa.gov.au/statutes/swans.nsf/Current+Documents+Version2?openview&Count=600&RestrictToCategory=A>

RELATED POLICIES

- WA Health Work Life Balance Policy
- WA Health Deferred Salary Scheme Policy
- WA Health Part Time/Job Share Policy
- WA Health Purchased Leave Policy
- WA Health Telecommuting Policy
- WA Health Grievance Resolution Policy
- Local Grievance Resolution Procedures

RELATED DOCUMENTS AND WEBSITES

- Department of Consumer and Employment Protection, Government of Western Australia, Mature Age Employment
<http://www.docep.wa.gov.au/LabourRelations/Content/Work%20Life%20Balance/Mature%20Employment/index.htm>
- WA Health Work Life Balance Website
www.health.wa.gov.au/worklifebalance
- WA Health Equity & Diversity Plan 2007-2009
<http://intranet.health.wa.gov.au/hwl/equity/index.cfm>
- Government Employees Superannuation Board (GESB) website
www.gesb.com.au

ACCESSING POLICIES

Policies are located on:

- Health Workforce Link (<http://intranet.health.wa.gov.au/hwl>)
- Local Intranet

IF YOU HAVE A QUERY

Employees who have queries are to contact their supervisor or manager. Managers or supervisors with queries should contact their Human Resources Department.

CONTINUOUS IMPROVEMENT

To maintain continuous improvement in the development of human resource policies, please refer any feedback regarding this policy to the Policy Officer, Workforce Division at policyofficer@health.wa.gov.au

VERSION CONTROL

This policy has been developed in accordance with the 'WA Health Workforce Policy Development Framework'.

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