



TEMPLATE DOCUMENT:

Age friendly employer policy

Introduction:

UK job vacancies, and the number of people in work are at record high, leading to extreme pressure for employers in holding on to and finding skilled staff. In the UK, we also have one in three workers aged over 50, with the average employee in their 40's; with an aging population, this is only going to grow.

Older employees can bring experience, deep knowledge, and level of skill valuable for an employer and so this template policy is developed to help you build an organisational culture that embraces an aging workforce. This policy will help you do this by addressing how you will approach recruitment, promotions, training and development, health and wellbeing, retirement planning.

Legal considerations:

The following pieces of legislation apply to this policy:

- Equality Act 2010

How to generate your policy:

Throughout the policy, you will see icons and highlighted areas (see key below). The icons used are for guidance on how to amend the document and should be deleted from the final document, together with any non-applicable optional clauses.

Key:

INFORMATION	ACTION	OPTIONAL	WARNING
This icon demonstrates the text is for information only.	This icon means you need to make an amendment to the text.	This icon means the advice provided is optional.	This icon means the text is important. Please take note of the advice.

Any text you find highlighted should be amended to **suit your customisations** and/or removed from the document.

Customising your policy:

In addition to the text emphasised with icons and highlights, you can also amend the font, margins and footer information to suit your needs.

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All fonts used throughout the document are set in the Styles panel (under the Home Tab in Word 2007+). To change the font settings, right click on the style and click *Modify*. Make the appropriate changes and click OK. Your document will automatically update wherever that style is used.

To remove the icons, click on them and press delete.

You will find a checklist of customisations at the end of the document. Please run through this once you have completed your customisations. You will also need to **delete this page by clicking Insert -> Cover Page -> Remove Current Cover Page. You should delete this prior to updating your table of contents, to ensure that the page references are all correct.**

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1 Purpose

- 1.1 We are committed to being an age friendly employer in our local community. We recognise the value and importance that experience can bring to the workplace to both the business as well as to our employees.
- 1.2 Accordingly, and in line with employment legislation, we are open to carrying our preferential treatment that is connected to age, when recruiting into the business, both from outside and from within the company. We will only do this however, where we have two candidates of equal merit.
- 1.3 All our working practices and policies promote equal opportunity and are inclusive for everyone, regardless of their age. Our Equal Opportunities and Diversity Policies set out further how we achieve this, and also covers how we extend our support to all minority groups within our workforce.



<We advise that you make all your policies non-contractual to minimise the risk of a breach of contract claim, and also to enable ease of updating.>

- 1.4 This policy is not contractual but outlines the way in which we aim to build and maintain a workplace culture that supports those who are in their years leading up to retirement, whenever this may be.

2 Scope



- 2.1 <Tailor to suit the range of workers in your business:> This policy covers all employees, including those on fixed-term or temporary contracts, as well as casual workers.

3 Our commitment

- 3.1 As an age friendly employer, we commit to:
- Conduct age positive recruitment campaigns
 - Remove age bias from our recruitment processes
 - Support working flexibly as a day one right of employment
 - Hire flexibly
 - Widen the range of flexible working options
 - Take 'positive actions' to positively support employees who would otherwise be disadvantaged because of their age
 - Providing ongoing support in the ongoing capability of an employee's ability to perform their role
 - Provide a wide range of working options to enable employees to plan for and transition to retirement.

4 HR policies and procedures

4.1 Our HR policies and procedures are regularly reviewed to ensure continuous improvement and may be amended to further promote equal opportunity within our company.

4.2 We collect relevant data to support the continuous review of our policies, procedures and working practices and to eliminate unlawful direct and indirect discrimination. Personal details provided by employees and job applicants for the purpose of equality monitoring are confidential and kept separate to all other records and not used for any other purpose.

5 Positive action

5.1 In limited circumstances, we may deem it necessary to take 'positive actions' to positively support employees who would otherwise be disadvantaged because of their age group.

5.2 We will only implement 'positive actions' when we believe that they will:

- Enable or encourage employees of a particular age group to minimise or overcome being disadvantaged because of their age
- Meet the needs of our employees in that age group and
- Help employees to participate in activities they would not otherwise be involved in.

6 Recruitment and promotion

6.1 It is the aim of the company to fill any vacancy by internal promotion or transfer wherever possible.

6.2 The company supports working flexibly from day one of employment.

6.3 We proactively encourage and support employees to engage in open and early discussions about their wishes for retirement. This is so we can provide the right tailored support in a timely manner that will assist in the transition; but it will also help with workforce planning and to help build supportive career development plans for the wider workforce.

6.4 We reserve the right in exceptional and strictly defined situations, to decide to carry out preferential treatment connected to age where we have two candidates of equal merit when we are recruiting/promoting.

6.5 Preferential treatment would be considering a candidate/employee's age when deciding on who to recruit or promote solely because a particular age group was at a disadvantage or under-represented in our company.

7 Training and development

7.1 We believe that all our employees, regardless of their age, are key to achieving our objectives and business plans and so we are committed to the personal and professional development of everyone and wish for all employees to achieve their full potential.

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- 7.2 We are committed to ensuring equality of opportunity in terms of access to training to increase employees' knowledge and skills and to provide them with opportunities to develop their potential.
- 7.3 It is our policy not to unfairly discriminate in the provision of training. No age limits apply for entry to training or development schemes - these are open to all employees.
- 7.4 Employees are encouraged to discuss with their line manager training and development needs relevant to their roles, but also for their future.
- 7.5 We are committed to supporting all employees in the lead up to their retirement and will do so by offering appropriate training. We advise the employee to speak openly and early to their line manager on their intentions for retirement, so that the company can be support their needs.
- 7.6 We believe that in the two-year period leading up to an employee's retirement, it is important for the employee, and their partner to be invited to attend a pre-retirement course. In addition, paid time off to take advice from an independent financial advisor will be granted.

8 Flexible working

- 8.1 Where flexible working can be supported by the business, we support the employees using our flexible working policy to achieve a better work/life balance.
- 8.2 We recognise that flexible working practices can assist employees in the lead up to their retirement.
- 8.3 Should any employee wish to prepare for retirement by gradually reducing their working hours, we will consider this, subject to the needs of the business.
- 8.4 Careful consideration should be given to any request to reduce working hours, as this will result in a pro-rata reduction in pay and benefits and may therefore have an impact on their pension. The implications will be fully discussed with the employee prior to any decision being made. Full details can be found in the company's Flexible Working Policy.

9 Health and wellbeing

- 9.1 We take the health and wellbeing of all our employees extremely seriously and recognise that people's health and wellbeing needs change as they age. We will provide the necessary support to employees who develop health issues which can include access to Occupational Health, introducing or amending existing reasonable adjustments or redeployment to an alternative role.
- 9.2 We ask that all employees remain open and participate in any request we may have for seeking the support and advice from any medical professionals.

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9.3 If after a period of long-term sickness absence, employees are incapable of returning to work, or of fulfilling the requirements of their roles and we have considered alternative options, it may be that there is no alternative course of action other than to end the employment. Prior to taking a decision to dismiss for ill-health we will aim to ensure that everything has been thoroughly considered to try to prevent this.

9.4 In considering the most appropriate course of action we will always seek to take advantage of any available benefits. [Optional tailor accordingly, if you operate a permanent health insurance scheme and/or offer a pension scheme that allows for ill health retirement] As part of the company's benefits offering, employees may be eligible for permanent health insurance (PHI), an insured benefit that provides eligible employees to an income of [insert the level of income the scheme could offer] when unable to work due to illness, injury for a specified period, in accordance with the scheme rules. Another option that would be explored is whether an employee would be eligible under the pension scheme to take ill health retirement. This/these benefits would be discussed as part of the company's support during the long-term sickness absence process.

In addition, and if appropriate, we will seek to find alternative employment within our business which is suited to the employee's skills and abilities. We will always ensure that any potential re-deployment opportunities have been explored prior to taking a decision to dismiss.

10 Retirement age

10.1 We have no fixed retirement age and all employees may continue working beyond State Pension Age, subject to their continued ability to do so effectively.

10.2 Employees may choose to retire at any time and we encourage them to discuss any thoughts or queries they may have about retirement with us at any stage so that we can all plan for this more effectively.

10.3 A retirement is effectively a resignation, and employees intending to retire are therefore required to give notice in accordance with their <specify, either "statement of terms and conditions"/"contract of employment">.

11 Retirement planning

11.1 Managers should be aware that financial advice, including pensions advice, should only be given to employees by those appropriately qualified and registered to do so.

11.2 Around ten years before the age at which the state pension would normally become payable, employees will be offered a meeting with an independent financial advisor to discuss their pension arrangements and the likely level of benefits, thus enabling them to plan accordingly. We will meet the cost of this advice.

11.3 Pre-retirement plans may also be raised at annual appraisals to give the employee the opportunity to discuss such matters well ahead of time. These could include:

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[Select as appropriate or define your own company transitions. Always check the rules of your pension scheme to see what is allowed].

- Retirement wind down – where the employee winds down to their retirement by reducing the number of hours or days worked
- Retirement step down - where the employee steps down into a different role, for example, to reduce the level of responsibility
- Retire and return – where an employee can retire, claim their pension benefits, and return to our employment
- Draw down – where an employee takes part in a partial retirement, which is by taking part of their pension benefits and continues their employment with the company
- Voluntary early retirement – where the employee voluntarily retires before the company's pension scheme normal retirement age

12 Related policies and documents

<Tailor your list as appropriate to the policies and documents in place within your business – the list below contains only suggestions:>

- Absence due to illness or injury
- Equal opportunity policy
- Diversity policy
- Health and wellbeing policy
- Menopause policy
- Flexible working policy
- Flexible working request form
- Recruitment and selection policy
- Retirement policy
- Training and development policy

The above list is not exhaustive.

13 Further information

Any queries or comments about this policy should be addressed to <specify whom>.

14 Policy owner

This policy is owned and maintained by <specify whom eg “the Managing Director”>.

15 Policy review date

Date last reviewed:

Checklist

Upon completion of customisations please ensure you have:

- ✓ customised all relevant text and removed pink highlighted text
- ✓ removed all icons
- ✓ removed the front cover (see instructions on front cover)
- ✓ updated the Table of Contents at the front of the document (highlight the ToC and press F9 or right click and update entire table)
- ✓ diarised a reminder to review and update the policy
- ✓ removed this checklist!