

12th May 1997

Chief Executive Officer
Each Health Board

Chief Executive Officer / Secretary/Manager
Each Voluntary and Joint Board Hospital

Chief Executive Officer/Administrator
Each Mental Handicap Agency

DEPARTMENT
OF HEALTH
AN ROINN
SLAINTÉ

Síopa
Bialann

Re: Pilot Early Retirement Scheme for Nurses

I am directed by the Minister for Health to refer to the recent agreement on pay and conditions for nursing grades under the P.C.W.

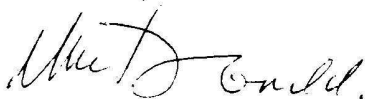
One element of this agreement provides for the introduction of a pilot early retirement scheme for Nurses age 55 or over who have 35 or more years service and who do not otherwise enjoy enhanced superannuation benefits. The pilot scheme is being introduced pending the report of the Commission on Public Service Pensions and will facilitate up to 200 nurses per annum.

Attached please find details of the terms under which the pilot scheme will operate and a schedule setting out the number of nurses in your agency who may be facilitated with early retirement under this scheme this year. The quota is based on the number of nurses employed on a permanent basis with the national figure of 200 distributed on a pro-rata basis to agencies.

The approval of the Minister may be assumed for implementation of the scheme in those agencies to which a quota has been allocated. Agencies are requested to disseminate details of the scheme as appropriate and to record details, in due course, of the number of applicants, the number of such applications approved and any other relevant information.

The Department will be requesting statistical information on the operation of this pilot scheme at a later stage. The Department will also be in communication regarding the pre-retirement job-sharing initiative for nurses shortly.

Yours Sincerely



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PILOT EARLY RETIREMENT SCHEME FOR NURSES WHO DO NOT OTHERWISE ENJOY ENHANCED SUPERANNUATION BENEFITS

Background Criteria

It is generally recognised that the health service continues to benefit from the experience gained and sense of duty of nurses with lengthy service.

At the same time it is recognised that some nurses may feel that the ongoing pace and complexity of developments in the delivery of the nursing service requires commitment, adaptability and input at a level which they find difficult to embrace.

The Adjudication Board finding on this issue recommended the implementation of a limited initiative to address the immediate situation of nurses (other than nurses who already enjoy enhanced superannuation terms) who find the demands of the profession are such that they are no longer able to function at the level of performance they themselves and management require. The Board concluded that an early retirement facility should be introduced for such nurses, subject to a number of criteria which would underpin the delivery of a consistently high quality nursing service.

Accordingly, and in the context of the subsequent Labour Court Recommendation on the matter, a pilot scheme is being introduced pending the Report of the Commission on Public Service Pensions which is addressing the overall issue of early retirement which will allow 200 nurses per annum aged between 55 and 60 opt to retire with immediate superannuation benefits based upon actual service.

Eligibility

The scheme will apply to nurses aged 55 or over who have 35 years or more wholetime reckonable service for pension purposes on or after 28 February 1997.

Reckonable Service

Reckonable service is all actual nursing service capable of being reckoned under the relevant superannuation schemes. e.g.

permanent service, temporary service, part-time service involving a commitment of 18 hours per week or over, and student nurse training service (under the traditional model).

Notional service (which, in any event, may be purchased only by those who would not have 40 years service at age, 65) and additional service purchased by way of Additional Voluntary Contributions is not reckonable.

Treatment of Reckonable Service

Where outstanding liability exists in respect of reckonable service, as set out above, such amounts will be deducted from retirement lump sums in accordance with arrangements in existence at time of benefit.

Application

Applications should be made, in the first instance, to the Director of Nursing/Matron setting out the reasons for the application. Applications endorsed by the Director of Nursing/Matron should be forwarded to the Personnel Officer. All applications from eligible nurses should be considered by the nurses' employer and approved or otherwise in line with the quota for approval in that employment. Any eligible nurse aggrieved by their exclusion from the scheme may seek a review of the decision by their employer. In consideration of any applications employers must satisfy themselves with regard to the criteria set out above and to the exigencies of the service generally including quality standards and the changing nature of service delivery.

Quota

A quota will be allocated to employers in line with the number of permanent nurses in employment. In the event that an employer receives no applications or the number of applications is below the quota for that employer arrangements will be made by the Department of Health to re-assign the unused quota to other employments where the number of applicants exceeded the quota available.

Strict priority will be accorded on the basis of age where the number of eligible applicants exceed the quota.

Monitoring Group

A group representative of both management and nursing unions will review the operation of the pilot scheme together with the operation of the pre-retirement initiative also proposed. This group will meet no later than 1 October 1997 to commence the review.

National Quotas for Pilot Early Retirement Scheme for Nurses who do not have enhanced superannuation benefits

Allocation of Nurses over all agencies according to the WTE number of permanent nurses at Dec. 95

Agency Name	WTE Permanent '95	WTE Job Sharing '95	Total Permanent	%	Allocation	Rounded
Eastern Health Board	1450	157.5	1607.5	11.33%	22.66562	23
Mid-Western Health Board	777	102.12	879.12	6.20%	12.39552	12
Midland Health Board	542	83	625	4.41%	8.812449	9
North-Eastern Health Board	665	68	733	5.17%	10.33524	10
North-Western Health Board	751	116.03	867.03	6.11%	12.22505	12
South-Eastern Health Board	1031	147	1178	8.30%	16.6097	17
Southern Health Board	1324	220.23	1544.23	10.89%	21.77352	22
Western Health Board	1094	101.5	1195.5	8.43%	16.85645	17
Adelaide Hospital	86	16.5	102.5	0.72%	1.445242	1
Beaumont Hospital	464	64.5	528.5	3.73%	7.451806	7
Bros. of Charity (Limerick)	81	11.5	92.5	0.65%	1.304242	1
Bros. of Charity (Waterford)	37	1	38	0.27%	0.535797	1
Bros. of Charity, (Lota, Cork)	28	4	32	0.23%	0.451197	0
Bros. of Charity, (Ballybane)	80	5.48	85.48	0.60%	1.205261	1
Caritas Convalescent Home	5	0	5	0.04%	0.0705	0
Children's Sunshine Home	8	0	8	0.06%	0.112799	0
Clifton Convalescent Home (Montenotte)	3	0	3	0.02%	0.0423	0
Coombe Women's Hospital	130	23	153	1.08%	2.157287	2
Cope Foundation	85	0	85	0.60%	1.198493	1
Cork Dental Hospital	1	1	2	0.01%	0.0282	0
Dgtrs. of Charity (Clonsilla)	48	12	60	0.42%	0.845995	1
Dgtrs. of Charity (Limerick)	67	6.5	73.5	0.52%	1.036344	1
Dgtrs. of Charity (Glenmaroon)	12	6	18	0.13%	0.253799	0
Dgtrs. of Charity (Navan Road)	103	25	128	0.90%	1.804789	2
Dgtrs. of Charity (Blackrock)	12	2	14	0.10%	0.197399	0
Drug Treatment Centre Board	3	0.5	3.5	0.02%	0.04935	0
Dublin Dental Hospital Board	4	0	4	0.03%	0.0564	0
Federated Voluntary Hospitals	1	0	1	0.01%	0.0141	0
Franciscan Missionaries Of The Divine Motherhood	27	2	29	0.20%	0.408898	0
Hume Street Hospital (Dublin)	17	0	17	0.12%	0.239699	0
Incorporated Orthopaedic Hosp. (Clontarf)	18	3	21	0.15%	0.296098	0
Leopardstown Park Hospital	16	2	18	0.13%	0.253799	0
Mater Misericordiae Hospital	369	23.5	392.5	2.77%	5.534218	6
Meath Hospital	183	11	194	1.37%	2.735384	3
Mercy Hospital, Cork	115	8	123	0.87%	1.73429	2
National Children's Hosp. (Harcourt St)	44	6.5	50.5	0.36%	0.712046	1
National Maternity Hospital, Holles St.	89	18.5	107.5	0.76%	1.515741	2
National Rehabilitation Hospital	41	7	48	0.34%	0.676796	1
Our Lady Of Lourdes Hospital, (Drogheda)	171	19.5	190.5	1.34%	2.686034	3
Our Lady's Hospice, (Harold's Cross)	61	6.5	67.5	0.48%	0.951744	1
Our Lady's Hospital, (Crumlin)	222	40	262	1.85%	3.694178	4
Portiuncula Hospital, (Ballinasloe)	103	15.5	118.5	0.84%	1.67084	2
Rosminian Fathers	25	2	27	0.19%	0.380698	0
Rotunda Hospital, (Dublin)	130	16	146	1.03%	2.058588	2
Royal Hospital, Donnybrook, Dublin	67	7.5	74.5	0.53%	1.050444	1
Royal Victoria Eye and Ear Hosp. (Dublin)	73	10.5	83.5	0.59%	1.177343	1
Sisters of the Bon Sauveur (Carriglea)	15	0.5	15.5	0.11%	0.218549	0
Sisters of the Sacred Hearts of Jesus and Mary	16	1.5	17.5	0.12%	0.246749	0
South Infirmary/Victoria Hspitl. Ltd.	88	12	100	0.70%	1.409992	1
St Patrick's, (Kilkenny)	22	2.5	24.5	0.17%	0.345448	0
St. John of God, (Stillorgan)	294	0	294	2.07%	4.145376	4
St. John's Hospital (Limerick)	40	9	49	0.35%	0.690896	1
St. Lukes and St. Annes Hospitals	63	4	67	0.47%	0.944694	1
St. Mary's Auxiliary Hospital (Baldoye)	10	1	11	0.08%	0.155099	0
St. Mary's Hospital, Cappagh	63	13	76	0.54%	1.071594	1
St. Michael's Hospital (Dunlaoire)	53	1	54	0.38%	0.761396	1
St. Michael's House (Dublin)	55	0	55	0.39%	0.775495	1
St. Vincent's (Fairview)	62	8	70	0.49%	0.986994	1
St. Vincent's Hospital (Elm Park)	325	44	369	2.60%	5.20287	5
St. James's Hospital	540	48.5	588.5	4.15%	8.297802	8
Stewart's Hospital, (Palmerstown)	99	9.62	108.62	0.77%	1.531533	2
Strs. of Charity Of Jesus And Mary, (Mooreabbey)	31	2	33	0.23%	0.465297	0
Strs. of Charity-Jesus-Mary (Westmeath)	18	0	18	0.13%	0.253799	0
Strs. of La Sagesse, (Sligo)	55	3	58	0.41%	0.817795	1
Temple Street Children's Hosp. (Dublin)	104	35.5	139.5	0.98%	1.966939	2
Total	12616	1568.48	14184.48	100.00%	200	198

Number of nurses to allocate

200

Notes:

- (1) The figures exclude student nurses and temporary nurses and health board psychiatric nurses
- (2) Clifton Convalescent Home and Caritas Convalescent Home are from 1996 funded by the SHB and EHB.