

PERSONNEL SERVICES

University Offices, Wellington Square, Oxford OX1 2JD
Acting Director of Personnel and Related Services



To: heads of departments and institutions, faculty board chairmen,
departmental administrators and faculty board secretaries

Ref. EMS/6

28 October 2011

cc. heads of division, divisional secretaries, Mr Gambles, Mr Shaw,
Ms Coe, Mr Ellis, Mrs Kinahan, Principal Administrator of the
Conference of Colleges

Employer Justified Retirement Age

Council has adopted a retirement age for university academic and academic-related staff, including (in respect of university appointments) the holders of joint appointments. Council Regulations 3 have been amended accordingly.

All existing members of academic and academic-related staff are deemed, with effect from 1 October 2011, to have a retirement date of 30 September preceding the 68th birthday. This is the Employer Justified Retirement Age (EJRA).

Where, under the Personnel Committee's procedures applying until 30 September 2011, a member of staff has a retirement date set by individual agreement, that retirement date will continue to apply.

Council has also adopted a procedure for considering requests from members of academic and academic-related staff who are due to retire on or after the EJRA, but who wish to extend their employment.

The EJRA has been adopted after University-wide consultation on its aim and scope, as well as on the procedure for requesting an extension. The policy and procedure will operate for an initial period of ten years and will be kept under regular review.

The colleges have agreed to adopt an EJRA in respect of the college part of joint appointments, and they have adopted a similar policy and procedure, in close consultation with the University.

Adoption of the EJRA does not affect the right of any employee to retire at a date earlier than the EJRA or to take the benefits to which they are entitled under the pension scheme to which they belong.

In addition, any request to appoint a member of academic or academic-related staff who is over the retirement age will need to satisfy the aims and considerations of the EJRA policy. All such requests should be submitted, via the Director of Personnel and Related Services, for approval by the Personnel Committee or the chair on the committee's behalf.

Full details are available on the Personnel Services website at <http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire/>



1. Action required of departments and divisions

- (a) Note the new arrangements concerning the retirement age of academic and academic-related staff.
- (b) Communicate the new arrangements to academic and academic-related staff by displaying this circular on departmental notice boards.
- (c) Put in place local arrangements to ensure that letters are sent to academic and academic-related staff no later than two years before their retirement date to remind them of that date, and to draw their attention to the procedure for requesting an extension of employment.
- (d) Identify those members of academic and academic-related staff whose retirement date falls due before 1 October 2013 (including those due to reach the EJRA and those who had a retirement date individually set under the previous Personnel Committee procedures).
- (e) Write at the earliest opportunity to those identified under (d) above to remind them of their retirement date, to draw their attention to the procedure for requesting an extension of employment, and to notify them of the date by when they should request such an extension, should they so wish.
- (f) Identify, and write to, any members of staff with whom there is good reason to initiate discussion of plans more than two years ahead of retirement date. This may apply in particular to those academic posts which are likely to require a considerable lead time to fill, were the current post holder to retire.
- (g) Note that the templates for new contracts have been amended to take account of the EJRA and that these templates should be used with immediate effect. They may be downloaded at <http://www.admin.ox.ac.uk/personnel/recruit/contracts/templates>.
- (h) In addition, any request to appoint a member of academic or academic-related staff who is over the retirement age will need to satisfy the aims and considerations of the EJRA policy. All such requests should be submitted, via the Director of Personnel and Related Services, for approval by the Personnel Committee or the chair on the committee's behalf.

2. Key changes to the retirement age for academic and academic-related staff

- Council has adopted a retirement age for university academic and academic-related staff, including (in respect of university appointments) the holders of joint appointments. Council Regulations 3 have been amended accordingly.
- All existing members of academic and academic-related staff are deemed, with effect from 1 October 2011, to have a retirement date of 30 September preceding the 68th birthday. This is the Employer Justified Retirement Age (EJRA).
- Where, under the Personnel Committee's procedures applying until 30 September 2011, a member of staff has a retirement date set by individual agreement, that retirement date will continue to apply.



- Where a member of staff has a retirement date set by individual agreement and this date is **earlier** than the EJRA, any request to work beyond the specified date should be referred to the Director of Personnel and Related Services.
- Council has also adopted a procedure for considering requests from members of academic and academic-related staff who are due to retire on or after the EJRA, but who wish to extend their employment.
- Departments and divisions must initiate the consideration of retirement options by writing to the member of staff at least two years before their retirement date, to remind them of that date and to draw their attention to the procedure for making a request to continue in employment beyond that date.
- Transition arrangements apply for those members of staff who are due to reach the EJRA, or their individual retirement date, within the next two years. Departments and divisions, as appropriate, should notify these staff at the earliest opportunity and the timings and deadlines set out in the procedure for requesting to work beyond the EJRA should be adjusted accordingly.
- Attention is particularly drawn to the encouragement given by Council to the early and informal exploration of all options, as well as to flexibility in the continuation or variation of contracts beyond the EJRA.
- The EJRA has been adopted after University-wide consultation on its aim and scope, as well as on the procedure for requesting an extension. It will operate for an initial period of ten years. The application and outcomes of the EJRA and its procedures will be reported annually to the Personnel Committee, and will be subject to an interim review after five years.
- The colleges have taken a binding vote to adopt an EJRA in respect of the college part of joint appointments, and have adopted a similar policy and procedure, in close consultation with the University.
- Adoption of the EJRA does not affect the right of any employee to retire at a date earlier than the EJRA or to take the benefits to which they are entitled under the pension scheme to which they belong.

3. Amendment to staff handbook

In agreement with the Oxford UCU, the Handbook for Academic-related Staff has been amended to take account of these changes. Section 3.9.3 now reads:

“3.9.3 Retirement

The normal date of retirement is 30 September *preceding* the member of staff's 68th birthday. You will be notified of your own date of retirement two years prior to that date. There is a procedure for considering requests from academic and academic-related staff who wish to request to work beyond the retirement date.



Under the University Statutes, you may choose to retire at, or at any time after, the minimum pension age stipulated in the Rules of the pension scheme to which you belong, on giving the amount of notice that would be required to terminate the appointment by ordinary resignation. Eligibility for retirement benefits, and the benefits payable, will be in accordance with the provisions of the pension scheme.”

4. Further information and support

Full details of the EJRA, the procedure for requesting to work beyond the EJRA, and template letters are available at <http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire/>

Overview

The full text of the EJRA document considered and agreed by Council is available at <http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire/>

Specific elements

The **Scope** of the EJRA, including details of staff covered by the EJRA, is at <http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire/>

The **Aim** of the EJRA is at <http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire/ejraaim/>

The **Procedure** for considering requests to work beyond the EJRA is given in full detail at <http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire/ejraproc/>

The **Considerations** which apply to consideration of any request to continue employment are at <http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire/ejraconsider/>

Practical guidance on implementing the EJRA procedure is available on the Personnel Services website at <http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire/pracguide/>. This provides an outline of the key stages and guidance (with a timetable and model letters) on the practical steps which divisions and departments need to take, including the immediate action which is required in the initial transition phase.

Retirement

Details of the **retirement options** available to academic and academic-related staff who are considering electing to retire before the EJRA are at <http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire/>

Pensions

Information on **pensions** and related matters is available from Pensions Office www.admin.ox.ac.uk/finance/oxonly/contacts/pensions/#d.en.11065

Further advice and briefing on the application of the EJRA may be obtained from Stephen Noakes (Head of Policy and Employment Relations), Personnel Services.

Ms A Cross

*Replaces existing circular: N/A
Copy for notice boards: Yes*