

## PERSONNEL SERVICES

University Offices, Wellington Square, Oxford OX1 2JD  
 Director of Human Resources



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

Ref. EMS/6

17 February 2014

cc. heads of division, divisional secretaries, Dr Gambles, Mr Shaw,  
 Director of Conference of Colleges Secretariat

### **The Employer Justified Retirement Age (EJRA): Changes to the procedure for considering requests to work beyond the EJRA**

*The Personnel Committee has agreed a number of changes to the Procedure for considering requests to work beyond the EJRA. The Considerations for considering requests have been clarified, and the template letters for use by divisions and departments have been updated.*

*Divisions and Departments are reminded that applications to work beyond the EJRA must be made in accordance with the timescale set out in the Procedure and that employment beyond the EJRA will only be approved in exceptional circumstances.*

#### **1. Background**

In 2011, in response to the abolition of the default retirement age, Congregation approved the adoption of an Employer Justified Retirement Age (the EJRA) of the 30 September preceding the 68th birthday for all academic and academic-related staff. The reasons for this decision are set out in the [‘Aim’ of the EJRA](#).

Council approved a Procedure for considering requests to [work beyond the EJRA](#). The aims of the EJRA will only be realised if the majority of academic and academic-related staff retire at the EJRA, but it was recognised that there may be occasional and exceptional circumstances when it is to the advantage of the individual and the University that an individual stays in employment after the EJRA for a defined period and a specific purpose.

The Personnel Committee reviews the operation of the EJRA Policy and Procedure each year. Following the second annual review and on the basis of two years’ experience of operating the Procedure, it has approved a number of amendments and clarifications.

The Personnel Committee also agreed that it would be beneficial to remind divisions and departments that the expectation underlying the policy is that retirement for academic and academic-related staff will take place on the 30 September preceding the 68th birthday, unless there are clear and compelling grounds for an exception to be made.

#### **2. Detail**

The revised Procedure, including the Considerations and links to the template letters, can be viewed on the website or via this [link](#).

The following amendments are of note:



- a) sections of the Procedure and template letters relating to the transitional period (2011-13) have been removed. The letters have been re-numbered accordingly;
- b) the introduction to the 'Considerations' has been revised, and the Considerations themselves have been reordered and clarified, to emphasise the University's expectation that most staff will retire at the EJRA and to explain why;
- c) the deadlines for applications to work beyond the EJRA have been emphasised and the deadline for applications for academic-related staff moved from nine to 12 months prior to the EJRA. The deadline for academic staff is 18 months prior to the EJRA;
- d) the template letters have been updated, with further information included about the aim of the EJRA, and several have been combined to reduce the number in use.

### **3. Action required of Departments**

Department and Divisions are asked to ensure that:

- a) they are familiar with the revised Procedures, Considerations and template letters, and that all relevant staff are made aware of them and use them in future;
- b) procedures are in place to ensure that staff are given notice of retirement in accordance with the timescales in the policy. Template letters are provided for this purpose: they may be adapted, but any 'local' letters must cover the same key points;
- c) those who have been granted an extension to their employment beyond the EJRA are given notice of their retirement at least two years (one year for academic-related staff) in advance of their revised retirement date. If this is not possible, because an extension of two years or shorter has been granted, notice should be given as soon as is practicable;
- d) those approaching retirement and their managers are aware of the timescales for submitting applications to work beyond the EJRA and that departmental and divisional decision-making processes are such that applications are received by the HR Director in accordance with those timescales. Late applications will only be considered in exceptional circumstances, at the discretion of the Chair of the EJRA Panel;
- e) in deciding whether to support applications to work beyond the EJRA, divisions and departments are mindful that approval will only be granted in exceptional circumstances and in accordance with the 'Aim' of the EJRA and the Considerations.

### **4. Further information**

If you would like to discuss the application of the EJRA Policy and Procedures in a particular instance, please consult your HR Manager or HR Business Partner in Personnel Services. If you have a query about the policy, please contact [sarah.thonemann@admin.ox.ac.uk](mailto:sarah.thonemann@admin.ox.ac.uk).

MR J DUXFIELD

Director of Human Resources.