

**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. EJRA

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

3 October 2017

### **Changes to the Employer Justified Retirement Age (EJRA)**

*In Hilary 2017, Council and Congregation approved changes to the University's EJRA. From 1 October 2017, the retirement age for all staff in posts at or equivalent to grade 8 or above has been increased by one year to the 30 September preceding the 69<sup>th</sup> birthday. Staff in posts at grades 6 and 7 have been removed from the coverage of the policy. In addition, applications for an extension of employment beyond the EJRA should be made two years, instead of one year, in advance of the retirement date.*

*Divisions and Departments are asked to ensure they are familiar with the updated processes and template letters. Updated EJRA Aims, Procedure and forms are awaiting approval by Personnel Committee, and will be published as soon as possible.*

*The current round of applications for an EJRA extension has now closed. Applications submitted on or before 30 September 2017 will be considered under the EJRA arrangements in place until September 2017.*

#### **1. Background**

The University has operated the EJRA since 2011. It was agreed that the EJRA would operate for ten years, with an interim review after five years.

A working party to review the EJRA was established by Council in July 2015. It reported to Council and Congregation in Hilary 2017. The full report is available at this [link](http://www.ox.ac.uk/sites/files/oxford/Report%20of%20the%20EJRA%20Review%20Group.pdf) ([www.ox.ac.uk/sites/files/oxford/Report%20of%20the%20EJRA%20Review%20Group.pdf](http://www.ox.ac.uk/sites/files/oxford/Report%20of%20the%20EJRA%20Review%20Group.pdf)).

Congregation approved the Group's proposals in Trinity 2017. This was confirmed in a postal ballot. Congregation also debated and voted on a resolution seeking the abolition of the EJRA. The resolution was defeated in the house and in a subsequent postal ballot. It was agreed that the changes to the EJRA would come into effect on 1 October 2017.

Personnel Services Officers held briefings for HR colleagues over the summer to update them on the incoming changes to the policy.

#### **2. Detail**

The changes to the EJRA, including links to the template letters and forms, can be viewed on the website or via this [link](https://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire8+/ejra/) (<https://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire8+/ejra/>).



It should be noted that:

- a) the coverage of the EJRA has been adjusted to every employee of the University who holds a post at, or assessed as equivalent to, grade 8 or above;
- b) the EJRA no longer applies to employees who hold a post at grades 6 and 7, and that employees at these grades therefore no longer have a normal or fixed retirement date;
- c) the age for the EJRA has been raised to the 30 September preceding the 69th birthday;
- d) an application for employment beyond an individual's EJRA date should normally be made two years, instead of one year, in advance of their original retirement date; and,
- e) further guidance will be provided to both staff and managers regarding the retirement process, and will be made available at this [link](http://www.admin.ox.ac.uk/personnel/end/retirement/retire-guide) ([www.admin.ox.ac.uk/personnel/end/retirement/retire-guide](http://www.admin.ox.ac.uk/personnel/end/retirement/retire-guide)) in due course.

### 3. Action required of Departments

Departments and Divisions are asked to ensure that:

- a) they are familiar with the updated materials, and that all relevant staff use them in future;
- b) they are mindful that staff in posts at grade 6 and 7 will no longer have a normal or fixed retirement date. Further guidance for retirement processes for staff at grades 6 and 7 is available at this [link](http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire6&7/) ([www.admin.ox.ac.uk/personnel/end/retirement/acrelretire6&7/](http://www.admin.ox.ac.uk/personnel/end/retirement/acrelretire6&7/)). Individuals over the EJRA can be now recruited into posts at grades 6 and 7;
- c) procedures are in place to ensure that staff are given notice of retirement in accordance with the policy. Guidance on retirement reporting is provided at this [link](http://www.admin.ox.ac.uk/personnel/usinghris/reporting/personnel/perdep07retirementplanning/) ([www.admin.ox.ac.uk/personnel/usinghris/reporting/personnel/perdep07retirementplanning/](http://www.admin.ox.ac.uk/personnel/usinghris/reporting/personnel/perdep07retirementplanning/)). Template letters are provided: they may be adapted, but should cover the same points; and,
- d) those approaching retirement and their managers are aware of the timescales for submitting applications to work beyond the EJRA. Late applications will only be considered in exceptional circumstances, at the discretion of the Chair of the EJRA Committee.

### 4. Further information

If you would like to discuss the application of the EJRA Policy 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 ([sarah.thonemann@admin.ox.ac.uk](mailto:sarah.thonemann@admin.ox.ac.uk)).

Mr Julian Duxfield

*Replaces existing circular: PERS(14)03  
For onward circulation/copy for noticeboards: Yes  
Website: [www.admin.ox.ac.uk/ps/staff/noticeboard/index.shtml](http://www.admin.ox.ac.uk/ps/staff/noticeboard/index.shtml)*

SJT/MJDL