# STRICTLY CONFIDENTIAL

### Retirement model letter ML1

### EJRA notice for academic staff to be sent by head of division (or equivalent) to employee at least 2.5 years before their EJRA

Dear [employee],

## Notice of retirement date

I have been advised that you will reach the age of 69 on or before 30 September [year]**.** As you may know, the 30 September preceding your 70th birthday is the retirement date for all academic staff .

I am aware of the valuable contribution you have made to both the [Department/Faculty] and the University during your career here. The purpose of writing to you so far in advance of your retirement date is to allow you ample time to consider your options and, if you wish, to discuss them with the University [for joint appointments: and with your college] [where applicable: and with the NHS]. Outlined below is a summary of the options available to academic staff nearing retirement.

## Retirement

You may elect to retire either on your retirement date or earlier if you choose, in accordance with the rules of the pension scheme to which you belong and subject to provision of the appropriate notice. The University’s Pensions Office provides pensions information and can be contacted by email at [uss@admin.ox.ac.uk](mailto:uss@admin.ox.ac.uk) and by phone at 01865 (6)16048. If you do decide to retire early, I would be grateful if you could notify me of your intended retirement date as soon as you are able.

## Flexible Retirement

In the period between now and your retirement date, you may wish to consider flexible retirement, if this is offered by your pension scheme. This is where someone continues to work, but takes a reduction in salary, for example by working reduced hours, in exchange for payment of a portion of their pension.

For further information see <https://hr.admin.ox.ac.uk/flexible-retirement>

## Retaining an involvement with the University after retirement

There are several options for retaining an involvement with the University after retirement other than employment which may be possible for you.

If you wish to continue with research activities, you may want to consider an honorary research agreement or holding departmental/faculty membership and emeritus status.

If you wish to continue teaching, you may want to discuss with your department/faculty whether there is a teaching need which you could fulfil on a casual basis.

If you wish to continue with other activities, you may want to discuss with your department/faculty whether there might be opportunities for you to undertake consultancy.

For further information see: <https://hr.web.ox.ac.uk/employment-status>

## Extension of employment beyond the Employer Justified Retirement Age

It is the policy of the University that academic staff and staff at grade RSIV or equivalents have a fixed retirement date in order to support the Aims of the EJRA. It is expected that all staff will retire by this date. However, there is a process by which staff can apply to work beyond their EJRA date in exceptional circumstances. If you consider that you can make a case to justify an exception, you have the option to make a request to continue to work at the University.

Requests to work beyond the EJRA are considered by the EJRA Committee, which is comprised of senior representatives from across the University. Full details of the Procedure for making such a request, including the type of matters that the EJRA Committee will take into account in making their decision, are available at: <https://hr.web.ox.ac.uk/the-ejra>

In outline, the key elements of this procedure are:

* If you do decide to apply, the deadline is 24 months before your retirement date ie 30 September [year]. You will first need to consult with your Head of Department. I am of course also available should you wish to have an informal discussion with me.
* The EJRA Committee will decide whether to approve your request. [For joint appointments: In the case of joint appointments, the college will make its decision according to its own regulations and procedures]. The request will be considered by the Committee in the light of the Aims of the EJRA and of the matters set out in the EJRA Procedure (see: <https://hr.web.ox.ac.uk/the-ejra)>.
* If your request is approved, it is important to note that you will be expected to step out of your current post, if permanent, into a newly-created, fixed-term post, on a grade appropriate to the duties to be delivered, to allow the refilling of your substantive post.

There is further guidance on these options available on the HR Support website (<https://hr.web.ox.ac.uk/retirement>). I would of course be happy to discuss them with you and to provide any other support that I can between now and your retirement date. Please do let me know if that would be helpful. You may also seek a meeting with your Head of Department, if you would find that helpful.

I must make you aware that this letter serves as formal notification that your employment under your current contract will cease on your retirement date, 30 September [date].

I am copying this letter to [head of department] [for joint appointments: and to [Head of House/Senior Tutor at college]].

Once again, I would like to take this opportunity to acknowledge and thank you for your ongoing contributions to [Department/Faculty] and to the University.

Yours sincerely,

[Head of division]

Cc:

[A signed and dated copy of this letter should be kept on file]