

## HUMAN RESOURCES

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Interim Director of Human Resources



To: heads of division and divisional registrars; all heads of department and institutions, faculty board chairs, departmental administrators/ heads of administration and finance

Ref. EMS/5,  
EMS/6/11

cc: Mr Faughnan, Mr Rodd, HR administrators, Director of the Conference of Colleges Secretariat

14 September  
2022

### **Proposed changes to the Employer Justified Retirement Age (EJRA)**

*The 10-year review of the EJRA was completed in Trinity term 2022 and proposals for changes to legislation were published in the Gazette on 21 July 2022. This circular sets out the implications for staff and departments of the main proposals should they be approved.*

*Departments and Divisions are asked to note the implications of the proposals and draw the attention of staff to the [FAQs on the EJRA webpage](#).*

#### **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 Review Group to carry out the 10-year review of the EJRA was established by Council in Trinity term 2021. It reported to Personnel Committee and Council in Trinity term 2022. The full report of the Review Group is available [here](#), and papers from the Group's meetings are available on the [review webpage](#).

Personnel Committee and Council approved the Review Group's recommendations, and those proposals requiring legislation will be put to Congregation in Michaelmas term 2022. Draft legislation was published in the [Gazette on 21 July](#) (pp. 503 and 514-15).

The proposed changes are as follows.

- a) Grades 8-10 and clinical equivalents and ALC6 should be removed from the EJRA with effect from the date of the Congregation decision.
- b) The age at which the EJRA is set for those staff for whom it is retained (Vice-Chancellor, Statutory Professors, Associate Professors and RSIV and clinical equivalents) should be raised by one year to 30 September preceding the 70<sup>th</sup> birthday with effect from 1 October 2023 (i.e. age 69).
- c) The Professor of Poetry and employed Visiting Professors should be removed from the EJRA with effect from 1 January 2023.

Age and retirement status restrictions on committee members (as set out in [Council Regulations 14 of 2002](#)) have been removed with effect from 5 August 2022.

## 2. Detail

The implications for staff and departments of the first two proposals, should they be approved by Congregation, are as follows.

### **a) Staff on grades 8-10 and clinical equivalents and ALC6**

#### *i) Those with a current EJRA date of 30 September 2022*

These staff will be planning to retire on 30 September 2022. If departments would like to discuss the situation in relation to members of staff in this group they should contact Ruth Kinahan ([ruth.kinahan@admin.ox.ac.uk](mailto:ruth.kinahan@admin.ox.ac.uk)).

#### *ii) Those with a current EJRA date of 30 September 2023 or later*

These staff would no longer have a fixed retirement date and would be able to retire at a time of their choosing by giving due notice. If the proposal is approved the HR Policy Team will write to those staff whose current EJRA date is 30 September 2023 (cc the department) to confirm this.

#### *iii) Those with an agreed EJRA extension due to end after the Congregation decision, including those formerly on academic grades*

Departments would use the normal end of fixed-term contract procedures for these staff. If the proposal is approved the HR Policy Team will write to these staff (cc the department) to explain this.

### **b) Staff in Statutory Professor and Associate Professor posts and grade RSIV and clinical equivalents**

#### *i) Those with a current EJRA date of 30 September 2022 or 2023*

These staff would retire as expected on 30 September 2022 or 2023. Anyone from this group who wanted an extension to their retirement date should already have applied (the deadline for applications for extensions is two years before the EJRA). If the proposal is approved the HR Policy Team will write to the staff due to retire on 30 September 2023 (cc the department/divisional office) to confirm that their retirement date remains at 30 September 2023.

#### *ii) Those with a current EJRA date of 30 September 2024*



These staff would be able to delay retirement by up to one year but would have to retire on 30 September 2025, which would be their new EJRA. If the proposal is approved the HR Policy Team will write to these staff (cc the department/divisional office) to confirm their new retirement date.

It is acknowledged that some departments may want to start planning now for recruitment to posts for October 2024 should the proposals not be approved. Departments can work on job descriptions and further particulars now, and could start to approach potential candidates provided they make it clear that the vacancy would be for either 2024 or 2025, but should not actually advertise any posts until the date is known for certain.

*iii) Those with an agreed EJRA extension due to end before or on 30 September 2023*

These staff would retire as expected on that date. Those who wanted a further extension should already have applied (the deadline for applications for extensions is two years before the expiry of their fixed-term contract). If the proposal is approved the HR Policy Team will write to these staff (cc the department/divisional office) to confirm their retirement date.

*iv) Those with an agreed EJRA extension due to end after 1 October 2023*

These staff will retire as expected at the end of their current extension unless they apply successfully for a further extension (see [section VII of the EJRA Policy and Procedure](#)). If the proposal is approved the HR Policy Team will write to these staff (cc the department/divisional office) to confirm their retirement date.

**c) Applications for extensions to employment beyond the EJRA**

Normally applications for extensions should be applied for two years before the EJRA, so staff whose EJRA is currently 30 September 2024 and who wanted to apply for an extension would do so by 30 September 2022. Congregation will not have made a decision on the proposals by then, but we plan to run an application round with a closing date of 5 December if Congregation decides to retain the current EJRA of 30 September before the 69<sup>th</sup> birthday.

**3. Action required of Departments and Divisions**

Departments and Divisions are asked to note the implications of the proposals as set out above.

**4. Further information**

If you would like to discuss the implications of the proposals in a particular instance, please consult your HR Manager or HR Business Partner in University HR. If you have a query about the policy, please contact Ruth Kinahan ([ruth.kinahan@admin.ox.ac.uk](mailto:ruth.kinahan@admin.ox.ac.uk)). Mrs Kinahan may also



be contacted to discuss individual cases in exceptional situations where circumstances have changed unexpectedly.

Mr Peter Brook  
Interim Director of Human Resources  
RK/PB

*Replaces existing circular: No  
For onward circulation: No*