# STRICTLY CONFIDENTIAL

Retirement model letter ML3

EJRA notice for academic staff with an individually agreed retirement date

For academic staff:

* who have passed the EJRA; and
* have an extended EJRA date agreed by the EJRA Committee since the introduction of the EJRA procedures on 1 October 2011.

to be sent by head of division (or equivalent) to employee 2.5 years before their retirement date or, if that is not possible, at the earliest opportunity.

Dear [employee]

## Notice of retirement date

I have recently been advised by [University HR / other HR Team] that your retirement date will be [date year]. As you know, this is your extended retirement date as a result of your successful application for an extension to your employment. It is expected that you will retire on this date.

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 now is to allow you 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].

The University’s normal expectation is that you will retire on your extended retirement date, in accordance with the terms of your extension and the rules of the pension scheme to which you belong. 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)16067.

You may wish to discuss with your head of department or similar whether there would be any opportunities for you to continue your involvement with the University on a non-employment basis under one of the options set in the Guidance on Retirement document which can be downloaded at <https://hr.admin.ox.ac.uk/retirement-staff-grades-6-to-10-&-ALC6>

You also have the option to make a request to continue to work at the University beyond your retirement date. However, please be aware that, in accordance with Section VII of the Procedure, a further extension for staff with a retirement date later than the Employer Justified Retirement Age will only be granted in the extremely rare event that it is required to address unforeseeable circumstances that have frustrated the purpose for which the original extension was granted.

If you consider that you meet this requirement, you may apply for an extension in accordance with the normal Procedure. Full details are available at <https://hr.admin.ox.ac.uk/the-ejra> . The normal deadline for applying is 24 months before your retirement date, that is, [date]. There is a process by which you can seek permission to submit a later request, if the circumstances that have delayed the completion of your work arose within 24 months of your extended retirement date. Before you submit your request, you will first need to consult with your Head of Department or equivalent and other interested parties. 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 light of Section VII of the Procedure.

If you are to be granted a further extension in employment and if you have not already stepped out of your substantive post, you will be expected to do so and to take up a newly-created, fixed-term post, on a grade appropriate to the duties to be delivered, which would allow the refilling of your substantive post.

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

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

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

Yours sincerely,

[Head of division]

Cc:

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