

## Timetable for implementation of proposed changes to the EJRA and transitional arrangements

It is proposed that the change in the coverage of the EJRA and the change in the retirement date from 30 September preceding the 68<sup>th</sup> birthday to 30 September preceding the 69<sup>th</sup> birthday would come into effect from 1 October 2017 ie **those who are due to retire at age 67 on 30 September 2017 would do so.**

If these proposals come into effect, **staff in grades 6 and 7** would no longer have a fixed or normal retirement age, with effect from 1 October 2017. They would be covered by the same arrangements as currently apply to support staff: <http://www.admin.ox.ac.uk/personnel/end/retirement/ssretire/>.

All other staff ie **those in grade 8 or above** would have a retirement date of 30 September preceding the 69<sup>th</sup> birthday, unless they have successfully applied to the EJRA Committee (or, before 1 October 2015, to the EJRA Panel) for an extension to their employment.

The change in deadline for applications for extensions (from one year prior to the EJRA date to two years prior to the EJRA date) would also come into effect on 1 October 2017.

If any individual has an EJRA date later than 30 September preceding their 69<sup>th</sup> birthday and that date falls before 30 September 2019, such that it would not be possible for them to apply for any subsequent application two years in advance, an individual timetable for any application for a further extension would be set with the agreement of the Chair of the EJRA Committee.

Individuals' date of birth	Notice of retirement – letter from University to individual	Deadline for application for extension – individual applies to University for extension	EJRA date – date the individual retires unless they have been granted an extension by the EJRA Committee
Those with a date of birth on or before 30 September 1950 ie due to turn 67 on or before 30 September 2017	No change - notice of retirement will have been given before 30 September 2015	No change - the deadline for applications was 30 September 2016	Individuals will retire at 67 in accordance with their written notice on 30 September 2017 unless an extension has been approved by the EJRA Committee (or Panel)
Those with a date of birth between 1 October 1950 and 30 September 1951 ie due to turn 67 between 1 October 2017 and 30 September 2018	Notice of retirement to be given at least 2 years in advance ie by 30 September 2017 <sup>1</sup>	No change – 30 September 2017 <sup>2</sup> – this is now two years, rather than one year, ahead of the revised retirement date	Individuals will retire on or before 30 September 2019 ie the 30 September before their 69 <sup>th</sup> birthday
Those with a date of birth between 1 October 1951 and 30 September 1952 ie those due to turn 67 between 1 October 2018 and 30 September 2019	Notice of retirement to be given at least 2.5 years in advance ie by 31 March 2018	30 September 2018	Individuals will retire on or before 30 September 2020 ie the 30 September before their 69 <sup>th</sup> birthday
Those with a date of birth on or after 1 October 1952	Notice of retirement to be given at least 2.5 years in advance of EJRA date	Deadline will be two years prior to EJRA date	EJRA date will be 30 September preceding the 69 <sup>th</sup> birthday

<sup>1</sup>As these individuals would have expected to retire in 2018, they will have already been given notice of that retirement date and the new notice letter will effect a change in retirement date.

<sup>2</sup>These individuals would have expected to retire at 67 in 2018 and they would have had a deadline for applications for extensions of 30 September 2017, so any application an individual envisages making should already be underway. It may now

not be needed if they had planned to seek an extension of a year or less; if it is still needed, minimal changes will be required to reflect the new retirement date.