

Retirement Policy (fixed retirement age)

Contents

1. Policy Statement
2. Purpose
3. Fixed Retirement Age
4. What to expect as you approach the fixed retirement age
5. Termination of your employment for retirement
6. Can you work beyond retirement?
7. Appeals

Author	Human Resources
Approved by	
Approval date(s)	
Review date	
Version	1.0
Document type	Policy and Procedure
Activity/Task	Retirement
Keywords	Retirement
Confidentiality	Public
Impact Assessment	Yes

Version Control Table

Version Number	Purpose / Changes	Author	Date

Retirement policy for the University (fixed retirement age)

1. Policy statement

- 1.1 The University has decided, having consulted with the recognised Trade Unions (UCU, UNISON, UNITE) and its employees that it is appropriate to have a fixed retirement age applicable to all employees.
- 1.2 Employees are of course free to retire before the fixed retirement age. The University recognises that employees may wish to consider changing their working patterns as they approach retirement and is receptive to requests for flexible working from employees of all ages. For further information, see our [Flexible Working Policy](#).
- 1.3 The University is proud to employ people of all ages and considers age diversity as beneficial to the institution. The University will not discriminate against employees because of age and adheres to the principles set out in its Equality and Diversity Inclusion Policy.

2. Purpose of the policy

- 2.1 This policy sets out the basis for the University's decision to have a fixed retirement age for all employees and the fact that this decision will be kept under review.
- 2.2 This policy sets out what steps the University will take to meet with you, as you approach the fixed retirement age, enabling you to express your preferences and expectations and enabling the University to plan for the future.
- 2.3 This policy does not form part of your contract of employment and the University may amend it from time to time as appropriate.

3. Fixed retirement age

The University has a fixed retirement age which is the 31 July following an employee's 68th birthday. The University considers the following as legitimate business reasons for this fixed retirement age:

- safeguarding the high standards of the University in teaching, research and professional services;
- promoting inter-generational fairness and maintaining opportunities for career progression for those at particular stages of a career, given the importance of having available opportunities for progression across the generations, in order, in particular, to refresh the academic, research and other professional workforce and to enable them to maintain the University's position on the international stage;
- facilitating succession planning by maintaining predictable retirement dates;
- facilitating flexibility through turnover in the workforce, especially at a time of headcount restraint, to respond to the changing business needs of the University;

- minimising the impact on morale by using a predictable retirement date to manage the expected cuts in public funding by retiring staff at the default retirement age; and
- avoiding performance management and redundancy procedures to consider the termination of employment at the end of a long career, where the performance of the individual and/or the needs of the University have changed.

The University will review whether this fixed retirement age remains necessary from time to time and will let you know if we believe it needs to change.

4. What to expect as you approach the fixed retirement age

- 4.1 Your Head of School/Unit will arrange to meet with you well in advance of your retirement date to discuss any relevant issues, such as whether a handover period is necessary or how your skills could be migrated to others within the University. It would also be an opportunity for you to raise any issues that you consider pertinent, such as whether you would like to work beyond the retirement date or in a different capacity. Ideally this meeting should take place at least 10 months before your retirement date, but in some cases a shorter period may be appropriate. You or your manager may decide that it is beneficial to meet on more than one occasion.
- 4.2 You should feel free to initiate a workplace discussion with your manager about your future plans with regard to retirement at any time. You may want to retire earlier than the fixed retirement date; work flexibly or in an alternative role in the period leading up to retirement. If so, you should raise this with your Head of School/Unit in order that a discussion can take place without any commitment by either party.

5. Termination of your employment for retirement

Under your contract of employment, your employment will automatically terminate at the end of the financial year (31 July) after your 68th birthday. The University will write to you, six months before this date to confirm your retirement date in line with the above. If you wish to retire earlier, please refer to the [Early Retirement Policy](#).

6. Can you work beyond retirement?

If you would like to work beyond retirement, you may raise this with your manager and the University will consider your request in light of surrounding circumstances, including our business reasons for having a fixed retirement age. The decision whether to grant a request to work beyond retirement will be made by the Workforce Planning Group following discussion with your manager. There is no guarantee that consent for one employee to work beyond retirement implies that the University will always grant such requests. The University will aim to treat employees consistently in this regard, subject to the needs of the University. If you wish to work beyond the fixed retirement age, please complete the Request to Work Beyond Retirement Form.

7. Appeal

Appeals against the decision of the Workforce Planning Group must be lodged, in writing, with the Director of Human Resources within 14 days of decision being communicated.

The panel will consist of one member of Court, who will be the Convener, a member of the Principal's Office who was not involved in the original decision and an appropriate Head of School/Unit. The Director of Human Resources or authorised delegate will act as secretary to the appeal panel. The panel will be supplied with all of the available evidence. The appellant may be accompanied to the meeting by a trade union representative or another member of the University. The Workforce Planning Group will be represented at the meeting. In addition it may be necessary for the Head of School/Unit to attend. No member of the Appeals Panel will have had any involvement in the earlier decision making process. The panel will be required to deliver its verdict on the appeal within 10 working days of the final meeting taking place.

