



## **RETIREMENT POLICY**

### **1. Policy statement**

The College aspires to the highest international levels of excellence in education, learning and research. It is important that in striving to achieve these aims the College can plan its staffing structures to allow maximum effectiveness across these activities, whilst considering the wishes of individual employees in relation to their work plans.

In accordance with Ordinance 24, this policy applies to the Principal and Fellows of the College, who, as a group, are responsible for the achievement of its purposes and for its governance, together with any other College Officer, and any person employed by the College under a contract of employment to do work of an academic nature. The equal and consistent treatment of that group underlies the policy, which, though framed to reflect and support the academic nature of those purposes, applies equally to Fellows whose role within the College is not of an academic nature but whose function is necessary to ensure that the college's academic functions are fulfilled. Throughout this policy the term 'academic staff' shall include any member of this group.

The College operates an Employer Justified Retirement Age (EJRA) for Fellows. Fellows will retire at the end of the academic year in which they reach the age of 69; however, if it is judged to be in the interests of the College to do so, a Fellow may be appointed on a year-to-year, or shorter term, basis as a casual supervisor beyond that age, or may be appointed to continue their duties as explained in the section 'Continuation of Employment' below.

The College does not operate a retirement age for non-academic/support staff.

The operation of this policy and the maintenance of a retirement age for Fellows will be kept under review. The Governing Body may amend this policy as appropriate to ensure its compliance with legislation and to maintain an effective set of procedures.

### **2. Academic Staff**

The College operates a retirement age for academic staff in order to achieve the following aims:

1. The promotion of inter-generational fairness and career progression;
2. The enabling of effective succession-planning;
3. The promotion of innovation in research and knowledge creation;
4. The preservation of academic autonomy and freedom; and
5. To align the academic employment pattern of the College with that of the University.

At the beginning of the academic year in which the member of academic staff reaches the age of 68,

the Principal will invite the individual to attend an informal meeting to discuss their intended retirement plans and the options available. A record should be made of the discussion.

The retirement options open to a member of the academic staff are detailed below.

- Normal Retirement

If a member of academic staff intends to retire at the retirement age, this is the default position and accordingly they need not take any steps to notify the College that this is the case. Their employment will therefore end automatically on 30 September of the academic year in which they reach the age of 69. However, it would be helpful if they would confirm this intention during the workplace discussion with the Principal.

- Flexible Retirement

If a member of academic staff wishes to work reduced hours and draw part of their pension for a period before full retirement then they can apply for flexible retirement. Further information can be found on the [USS website](#).

- Early Retirement

If a member of academic staff wishes to retire before the retirement age they should advise the Principal and HR of the planned early retirement. This should be submitted no later than six months before the intended early retirement date, where practicable.

- Delayed Retirement

Members of academic staff are currently required to vacate their offices no later than the end of the academic year in which they reach the retirement age. However, in exceptional circumstances it may be possible for an individual to be granted an extension of their employment on an unestablished fixed-term basis, thereby delaying their retirement for a limited period of time. For further information, please refer to 'Continuation of Employment'.

### **3. Continuation of Employment**

#### **3.1 Criteria**

A member of academic staff may apply or be invited to continue his or her existing duties in some other paid role in the College beyond the retirement age. The period of appointment will be that judged appropriate in the circumstances of the case but will not normally exceed one year in the first instance. Extension of appointment is possible and any extension will be judged on the same criteria as for initial appointment.

Any continuation of existing duties, and the period of such continuation, will be considered in the light of Aims 1 to 5 (see page 2 of this policy) and taking into account the following criteria:

- (a) Is the appointment of the individual the best way of meeting the College's need for the work?
- (b) Could the College's need be met in as satisfactory a way by appointing a non-retired person?

(c) Is the appointment of the individual to meet a temporary need?

(d) Is the appointment in the financial interests of the College or the University (for example, it may be directly connected with securing funding from external grants associated with the Fellow; however, in practice this criterion is less likely to apply in relation to a College than to continuation in University employment)?

(e) Does the appointment assist in the strategic planning of the College?

(f) If the individual is retiring from employment by the University, has he or she applied to the University for the continuation of employment, and with what result?

The judgment whether to continue appointment beyond the retiring age against the above criteria will be made by the Council.

### 3.2 Procedure for applying for a continuation of employment

A member of academic staff who wishes to continue their employment for a limited period of time beyond the retirement age should discuss their intentions with the Principal at the earliest opportunity.

If they wish to proceed, they will need to confirm in writing the reasons for the extension which should be in line with the criteria for evaluating requests above and submitted to the Principal, by 31 December, 21 months before the retirement age.

The Principal will meet with the member of staff to discuss the details of the requested continuation of employment. The Principal will arrange for the application to be considered by Council. The request will be considered against the evaluative criteria set out above including the need for such contracts to be objectively justified.

The individual will be advised of the outcome of the application in writing and will be provided with written reasons for the Council decision.

Where the employment of a member of academic staff is extended beyond the retirement age that employment will be in a fixed-term capacity. A new contract of employment will be issued reflecting the title and terms of the new fixed-term appointment. The new contract end date will be the individual's extended employment end date.

The College will continue to rely on retirement as a reason for ending the employment relationship at the end of this fixed period or employment, including where there have been successive extensions. Similarly, members of academic staff who have retired but are seeking re-employment in any capacity will remain in scope of the retirement age and their re-employment will be subject to the same approvals process as a request to continue employment beyond the retirement age.

During the period of extended employment, the Principal should continue to meet annually with members of staff whose employment has been extended to discuss their ongoing plans. The meetings will allow a discussion of the individual's wishes together with the College's plans, including potential variations in existing arrangements, and enable due process in advance of the extended employment end date. Any salary progression will be managed in line with the appropriate salary scale for the post.

A member of academic staff may apply to continue working beyond the retirement age on a part-time or full-time basis. If they intend to work in a part-time capacity then they will be required to submit an

application to continue employment, and any approval of that application would be treated as Flexible Retirement under the rules of the USS. For further information, please refer to Section on ‘Flexible Retirement’ as outlined in Section 2 above.

Appeal Procedure

Where a member of academic staff is dissatisfied with the outcome of a request to continue their employment beyond the retirement age, they will have a right of appeal. Any appeal should be made in writing to the Principal within 14 days of the outcome of the request being communicated to the employee and should set out the grounds of appeal.

Appeals will be heard by an appeal panel constituted in accordance with schedule 3.1 – Constitution of Panels. The appeal panel will meet within 14 days of its establishment to hear the appeal, or as soon as is reasonably practicable. The appeal will be determined following an oral hearing attended by the appellant. The Appellant will be entitled to make a statement and to address the appeal panel.

Following the hearing of the appeal, the appeal panel will consider the facts of the case and may allow or dismiss an appeal, in whole or in part. The decision of the appeal panel will be notified to the appellant in writing within seven days of the hearing.

The appeal panel may decide to vary the above procedure as it deems appropriate. The decision of the panel will be final.

Policy change history:		
Date	Summary of Changes	Date of next review
November 2018	Update	Not specified
October 2024	Update in line with University of Cambridge policy changes, GB approval Dec24	November 2026