AGE RETIREMENT PROCEDURE

Background

1. This note sets out the University’s procedure for Age Retirements under the Employment Equality (Age) Regulations 2006 which take effect on 1 October 2006.

University’s Age Retirement Policy

2. The Normal Retirement Age (NRA) for University employees is 65 and staff will normally retire from employment on the University Retirement Date (URD) which is 31st July following their 65th birthday.

3. Employees may opt to retire on reaching the age of 60 years or thereafter before reaching the age of 65 by giving the normal period of notice under their terms and conditions of employment. Such voluntary age-related retirements are not covered by this procedure.

Notification

4. Staff will be notified of their retirement no earlier than 12 months and no later than 6 months before their URD using the letter at Annex A.

Right to Request

5. Staff may make a request to stay beyond their URD by submitting the form at Annex B.\(^1\) Requests should state whether staff wish to remain indefinitely or for a specified length of time.

6. Requests must be made no earlier than 6 months and no later than 3 months before the URD.

Procedure to Consider Requests

7. Following receipt of a request from a member of staff, the HR Department will arrange a meeting to consider the request. The meeting will take place within twenty working days, unless it is not reasonably practical to do so.

8. Requests will be heard by a senior manager in the department or area employing the individual, along with a member of the HR Department. The member of staff may be accompanied at the meeting by a work colleague.

\(^1\) Staff of the London Deanery should make requests to the Deanery HR Department. Staff of the KSS Deanery should make requests to the KSS Deanery HR Department.
or Trade Union Representative. The decision will be notified to the member of staff in writing within five working days of the meeting.

9. If a request is accepted then the employee’s contract of employment will be amended accordingly. If it is not accepted the employee will be notified using the letter at Annex D.

Criteria for Considering Requests

10. Normally staff will be expected to retire at the URD. Requests may be agreed where exceptional considerations apply and examples may include:

   a. The need to retain scarce and valuable skills;
   b. An inability to fill the post by redeployment, recruitment or reorganisation.

Appeals

11. If staff believe the process has not been correctly applied, or if new and relevant evidence has become available, they may appeal stating the grounds for their appeal. Any appeal should be sent to the HR Director within ten working days of the date of the letter giving the University’s written decision. Disagreement with the University’s decision is not a valid reason for appeal.

12. Following receipt of an appeal, the HR Department will arrange a meeting to take place within twenty working days. Appeals will be heard by a more senior manager in the department or area employing the individual, along with a member of the HR Department. Neither of those hearing the appeal will have had a previous involvement in the original decision.

13. The result of the appeal will be notified in writing within five working days. This is the end of the process and there is no further appeal stage.

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2 Staff of the London Deanery should send appeals to the Head of HR in the London Deanery. Staff of the KSS Deanery should send appeals to the Head of HR in the KSS Deanery.
ANNEX A

Notification of intention to Retire an Employee

1 I am writing to inform you that your retirement date will be [insert date]. You have a right to request not to be retired.

2 The University will give careful consideration to any request you may make to work beyond this date and will inform you if your request can or cannot be accepted. The University is not required by law to give a reason.

2 Your request not to be retired must be submitted to the HR Department no later than three months before the date stated in paragraph 1. If your request is not made by that time you will lose your statutory right to have it considered and you will be retired on the retirement date above.
ANNEX B

REQUEST TO REMAIN IN EMPLOYMENT AFTER UNIVERSITY RETIREMENT DATE

Full Name:

Payroll Number (refer to payslip):

Department:       Extension Number:

I would like the University to consider my request to remain in employment after 31 July following my 65th birthday.

Delete as applicable:

Either

(a) I would like to remain indefinitely

or:

(b) I would like to stay until .................. ............(insert date)

If you wish to provide a Statement in support of your application please do so here, or attach on a separate sheet:

Signed:      Date:

Request forms should be returned to the HR Department, 4th Floor, Stewart House

3 Staff of the London Deanery should make requests to the Deanery HR Department. Staff of the KSS Deanery should make requests to the KSS Deanery HR Department.
ANNEX C

LETTER INVITING EMPLOYEE TO MEETING TO DISCUSS REQUEST TO STAY BEYOND NORMAL RETIREMENT AGE

1 I am writing to inform you that I have received your request not to be retired and that there will be a meeting to discuss your request on [insert date] at [insert time] at [insert location].

2 You have a right to be accompanied at the meeting by a work colleague or a recognised trade union representative. Your companion can address the meeting but not answer questions on your behalf although you may confer with your companion during the meeting.

3 After the meeting if the University agrees to continue your employment beyond the intended retirement date of [insert date] you will receive written notification reflecting these agreed changes to your contract.

4 If your request is not agreed you will receive further notification confirming your intended retirement date and informing you of your right to appeal.
ANNEX D

LETTER INFORMING EMPLOYEE OF OUTCOME OF MEETING (IF UNSUCCESSFUL)

1 I am writing to inform you that, after our meeting held on [insert date] to discuss your request not to be retired, the University still intends to retire you on [insert intended retirement date].

2 You have a right to appeal against this decision if you believe the process has not been correctly applied or if new and relevant evidence has become available. If you wish to appeal you must inform me in writing within ten working days of the date of this letter. If you do not do this you may lose the right to an appeal meeting and we may consider your appeal without holding a meeting, but taking into consideration any previous representations that you have made.