

Retirement Policy and EJRA Review Group 2023

Terms of Reference

Approved by the General Board and the Council on 15 and 20 February 2023.

1 Role of Retirement Policy and EJRA Review Group

- 1.1 The Human Resources Committee has established a Retirement Policy and EJRA Review Group (“the Review Group”) to undertake the following activity:
 - 1.1.1 to review the operation of the current Employer Justified Retirement Age (EJRA) to determine whether it has been successful in meeting its [aims](#), which are to:
 - ensure inter-generational fairness and career progression;
 - enable effective succession-planning;
 - promote innovation in research and knowledge creation; and
 - preserve academic autonomy and freedom;
 - 1.1.2 to review the terms of the current [Retirement Policy](#) to establish whether they remain fit for purpose;
 - 1.1.3 to seek the views of the University community on the current arrangements and any proposed changes; and
 - 1.1.4 to report on its findings, including any recommendations for change, where appropriate.

2 Background

- 2.1 When the Employment Equality (Age) Regulations were first introduced in 2006¹, employers were able to retire employees compulsorily at or over the default retirement age (“DRA”) of 65, provided they followed a statutory retirement notification procedure.
- 2.2 The Government subsequently abolished the DRA with effect from 6 April 2011, with transitional procedures covering the period 6 April 2011 to 30 September 2011. Since then, an employer has been able to operate a compulsory retirement age, if it can show that it is objectively justifiable as a proportionate means of achieving a legitimate aim. A retirement age that can be justified in this way is referred to as an Employer Justified Retirement Age (“EJRA”).
- 2.3 The University currently operates an EJRA for University officers² only, which is at the end of the academic year (30 September) in which the officer reaches the age of 67. The University does not operate a retirement age for assistant, unestablished research, unestablished academic-related and unestablished academic members of staff.

¹ The Employment Equality (Age) Regulations 2006 (SI 2006/2408) came into force on 1 October 2006. The Regulations have since been superseded by the Equality Act 2010.

² Excluding the Chancellor, the High Steward, the Deputy High Steward, the Commissary and any University officer who is exempted under any Statute or Special Ordinance from the provisions of Special Ordinance C (ii) 12.

Development of the University's Retirement Policy

- 2.4 The Human Resources Committee established an academic-led working group in October 2010 to consider the University's options in light of the Government's proposed abolition of the DRA. The working group invited comments from staff during January 2011³.
- 2.5 In May 2011⁴, the General Board and the Council issued a joint consultative paper, which discussed various approaches, including enhanced performance management procedures for staff of all ages as an alternative to an EJRA. The paper also launched a consultation exercise, comprising four open staff meetings, a Discussion of the Regent House on 17 May 2011⁵, submissions to a dedicated mailbox and discussions with relevant trade unions. Subsequently, the working group conducted further informal consultation with School Councils and Faculty Boards.
- 2.6 The majority of responses, including the response from each of the six School Councils, were in favour of continuing a retirement age for established staff, providing that appropriate arrangements for considering extensions for employment beyond that age were in place. There was no similar consensus supporting a retirement age for other groups of staff.
- 2.7 Accordingly, the General Board and the Council recommended in the *Joint Report of the Council and the General Board on a retirement policy for University staff*, published on 14 December 2011⁶, that the University apply an EJRA to all officers (with certain specified exemptions) at the end of the academic year in which they reach 67, and that there should be a process for permitting extended working beyond the EJRA in appropriate cases. It was also proposed that a compulsory retirement age should no longer apply to other staff.
- 2.8 Following a Discussion on 24 January 2012⁷, the Council, with the concurrence of the General Board, agreed to submit a Grace⁸ to the Regent House for the approval of its recommendations on a retirement policy, and on which there would be a ballot. Flysheets were reprinted on 2 May 2012⁹. The result of the ballot was that the recommendations were approved on 27 April 2012¹⁰. The Retirement Policy was formally adopted on 1 June 2012.
- 2.9 Following a review of the Retirement Policy in 2015/16¹¹, the EJRA was maintained at the age of 67 for both academic and academic-related University officers. Additionally, the aims of the EJRA were redefined, the criteria for evaluating requests to work beyond the EJRA were reworded and the separate Voluntary Research Agreement procedure was brought within the Retirement Policy, with individuals being permitted to choose whether an extension is paid or unpaid¹².
- 2.10 A further review of the Retirement Policy was scheduled to take place during 2019/20, but this work was postponed due to the Covid pandemic. Instead, minor editing to the policy was approved in 2021 for the purpose of clarity and to increase the number of members appointed by the Council by one in the membership of the Retirements Committee, which considers request for extensions of employment.
- 2.11 On 20 October 2022, the Human Resources Committee agreed that a review would take place during the academic year 2022/23, commencing Lent Term 2023.

³ <http://www.admin.cam.ac.uk/reporter/2010-11/weekly/6209/section1.shtml#heading2-11>

⁴ <http://www.admin.cam.ac.uk/reporter/2010-11/weekly/6222/section1.shtml#heading2-5>

⁵ <https://www.admin.cam.ac.uk/reporter/2010-11/weekly/6226/section8.shtml#heading2-24>

⁶ <https://www.admin.cam.ac.uk/reporter/2011-12/weekly/6249/>

⁷ <https://www.reporter.admin.cam.ac.uk/reporter/2011-12/weekly/6253/section7.shtml#retirement>

⁸ <https://www.reporter.admin.cam.ac.uk/reporter/2011-12/weekly/6256/section1.shtml>;

<https://www.reporter.admin.cam.ac.uk/reporter/2011-12/weekly/6256/section7.shtml>

⁹ <https://www.reporter.admin.cam.ac.uk/reporter/2011-12/weekly/6264/section9.shtml>

¹⁰ <https://www.reporter.admin.cam.ac.uk/reporter/2011-12/weekly/6264/section8.shtml#heading2-19>

¹¹ <https://www.admin.cam.ac.uk/reporter/2014-15/weekly/6390/section1.shtml#heading2-7>;

¹² <https://www.admin.cam.ac.uk/reporter/2016-17/weekly/6435/section1.shtml#heading2-3>

2.12 Consistent with the previous review of the Retirement Policy, the Human Resources Committee agreed to convene an academic-led working group to conduct the review. There will be a full consultation with the University community.

3 Membership

3.1 The following members have been selected to represent the interests of the various stakeholders in this matter:

Membership	Name	Title and Institution
Chair	Professor Richard Penty	Professor, Department of Engineering
Member of the University Council	Dr Louise Joy	Director of Studies, Faculty of English
Member of the University Council	Professor Jason Scott-Warren	Professor, Faculty of English
Head of School	Professor Tim Harper	Head of the School of the Humanities and Social Sciences
Head of School	Professor Nigel Peake	Head of the School of the Physical Sciences
Head of School	Professor Patrick Maxwell or Professor Ed Bullmore as the deputy Head of School	Head of the School of Clinical Medicine
Head of Non-School Institution	Dr Jessica Gardner	University Librarian, Cambridge University Library
Academic Secretary	Dr Michael Glover	Academic Secretary, Academic Division
Chair of the Committee of Colleges	Professor Pippa Rogerson	Master of Gonville and Caius College
Members of the Regent House	Dr Nicholas Holmes	University Senior Lecturer, Department of Pathology
	Professor Diane Coyle	Bennett Professor of Public Policy and Co-Director of the Bennett Institute for Public Policy
	Dr Thomas Roulet	Associate Professor in Organisation Theory, Judge Business School
	Dr Ella McPherson	Associate Professor, Department of Sociology
	Professor Sriya Iyer	Professor, Faculty of Economics
Representative of the Cambridge branch of UCU	Mr Michael Abberton	Unite representative

Representative for the Cambridge branches of Unite and Unison	Ms Jayne Green	Unison representative
Representatives of the Postdoc community	Dr Nino Läubli	President of the Postdocs of Cambridge Society
	Dr Soujanya Mantravadi	Postdoc Research Associate
A retired academic	Dame Mary Beard	Professor Emeritus

3.2 The Review Group will be supported by the following:

Role	Name	Title and Institution
Secretary to the Review Group	Andrea Hudson	Director of HR, Human Resources
HR Policy Lead	Janine Payne	Policy Consultant and Employee Relations Manager, Human Resources
Legal Advisor	Sam Gardner	Senior Solicitor, Legal Services Office
Pensions Advisor	Sue Curryer	Head of Pensions Administration
Data and Analysis	Cat Atkinson	Interim Head of HR Business Systems and Analysis
Communications	Andrew Aldridge	Head of Internal Communications and Deputy Director of OEAC

3.3 The Review Group may appoint a Deputy Chair.

3.4 The Chair may invite others to attend the meetings of the Review Group to provide specialist knowledge or external professional advice as appropriate.

4 Operation of the Group and Reporting

4.1 The Review Group will commence in Lent Term 2023 and a report will be submitted to the Council during Michaelmas Term 2023.

4.2 The Review Group will manage conflicts of interest in line with the University's [Conflict of Interest Policy](#).

4.3 Urgent matters can be decided by circulation upon the agreement of the Chair or their Deputy.

4.4 Privileged legal advice will be provided to the Review Group as required.

4.5 The minutes of the Review Group meetings will be submitted to the Human Resources Committee.

4.6 The Chair may provide oral reports to the General Board and the Council.

5 Documentation

5.1 The Review Group will receive the following documents at least three working days in advance of each meeting:

5.1.1 agenda for upcoming meeting;

5.1.2 notes of the previous meeting; and

5.1.3 any other documents/information for consideration at the meeting.