University of Birmingham
Later Working Life and Retirement Policy

1. Introduction

1.1 The University is committed to recruiting, developing and retaining the very best staff and to being a destination of choice amongst our peers. In meeting this goal we recognise that staff of all ages and stages of their careers contribute to the success of the University. We also recognise that increased longevity, the ending of a set retirement age and changes to pension arrangements will significantly change working life over the coming years, and are committed to the fair treatment of staff in later working life.

1.2 The purpose of this policy is to set out and provide guidance on the arrangements and options for staff planning their later working life, including arrangements for retirement. The policy applies to all staff and has been developed following the ending of the UK’s default retirement age, and the subsequent wider range of options available to staff as they approach pensionable age.

2. Retirement age

2.1 University policy from 1 October 2011 is not to enforce a set retirement age. Instead, it is up to each member of staff to decide when they wish to retire and to give the University notice of their retirement date (see section 5 for notice periods).

2.2 The University still reserves the right to retire staff at or after the age of 65. However, for the majority of staff, retirement will not be enforced.

3. Managing later working life

3.1 In practice, there should be no difference between how staff of different ages are employed and managed, including staff who work beyond what was once considered University retirement age. Age discrimination legislation makes clear that all staff should be treated fairly and managed on the basis of their performance, and that assumptions should not be made about individual’s abilities and aspirations on the basis of their age. If staff of any age are considered to be under-performing, existing performance management policies should be used to address this.

3.2 Managers and staff are expected to have regular development review meetings, which include discussions of short, medium and long-term career plans. In the case of staff in the later stages of their working life, this presents an opportunity to raise any changes they are considering making to their working life, such as retirement or reducing their working hours in the run up to retirement (see sections 4 and 5 below), and to begin to

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1 Prior to this date the University retirement age was 65, with Academic and Academic Related staff expected to retire at the end of the academic year, and Support staff at the end of the month, they attained 65. Academic and Academic Related staff employed before 1983 with no more than 1 year’s break in service previously had the option of working to the end of the academic year they attained 67 years of age.

talk through these options with their manager. However, retirement is not formal until written notice has been given as per section 5.

3.3 A small number of roles may require staff to undergo annual health and/or fitness checks, if this is necessary to ensure the role can be undertaken safely and effectively. Where this is the case, these checks will apply to all staff in those roles, irrespective of age.

3.4 In keeping with the removal of a set retirement age, from 1 October 2011 applicants of any age can apply for posts at the University.

4. **Planning for the future**

4.1 For many staff, work and retirement plans are likely to be determined by the availability of a pension income. Information on pension schemes open to University staff is available from the Finance Pensions team.

4.2 The Human Resources website has further information on later working life, including options such as reducing working hours in the run up to retirement.

5. **Giving notice of retirement**

5.1 As noted above, the University will no longer enforce a set retirement age or issue notices of retirement to staff. Staff planning to retire from the University therefore need to give formal written notice of their intention. Notice periods for retirement vary depending on the type of contract staff are employed on:

- **Academic Teaching contracts**: minimum of 1 term’s notice (in the case of a retirement that takes effect at the end of the Summer vacation, notice must be given by not later than 1 July)
- **Academic Research contracts**: minimum of 3 months’ notice
- **Academic Related contracts**: minimum of 3 months’ notice
- **Support contracts**: minimum of 1 month’s notice and preferably 3 months’ notice

5.2 Notice should be in writing and state i) that you intend to retire and ii) the date you will retire on (i.e. your last day at work). Notice should be sent to your line manager. Formal written notice must still be given even if staff intend to retire at their original University retirement age and/or date.

5.3 Once notice of retirement has been received it may not be withdrawn, except with the written agreement of the Director of Human Resources.

6. **Further information**

6.1 Further information and resources on later working life and retirement is available at [www.intranet.birmingham.ac.uk/hr/laterworkinglife/](http://www.intranet.birmingham.ac.uk/hr/laterworkinglife/).

6.2 Human Resources and Finance (Pensions) can provide further advice and guidance on later working life and retirement issues.