



The Ageing Workforce – A Resource for Managers

This resource is designed to enable managers to find information on the challenges and opportunities an ageing workforce might present. It follows on from the Age Awareness Toolkit which was developed by the UK NHS Working Longer Group and adapted for Scotland by the NHSScotland Working Longer Group. It has been published at the same time as a resource for staff and their representatives explaining their part in meeting the challenge of an ageing workforce.

Throughout this resource we will use the term 'older worker(s)' to denote staff aged 50 or over. We will also refer to 'working longer' as meaning working to a higher age before full pension benefits are payable.

The Working Longer Groups recognise the need to support managers in developing positive age management approaches to support workers of all ages, and believe that this will have a significant positive impact on employment relations and service delivery.

A report from the Advisory, Conciliation and Arbitration Service (ACAS) - *Managing older workers 2016* – identified that managers' insecurity and lack of confidence with regards to older workers may be due to fear of difficult conversations and what is perceived as a legal minefield.

Caring for an ageing society while supporting an ageing workforce is one of the greatest, but

perhaps the least understood, challenges facing the NHS, employers and staff. It is especially relevant for organisations facing recruitment challenges, as better strategies to retain and effectively deploy older workers can be overlooked in preference of other measures.

Background

The 2015 NHSScotland Pension Scheme, which was introduced as a result of the Public Service Pensions Act 2013, saw the normal pension age (i.e. the age at which a member can claim their full benefits) set equal to state pension age (SPA). This means most current NHS staff will only be able to access their full NHS pension benefits after the age of 65.

The UK and Scottish Working Longer Groups were established to address the impact of working longer in the NHS as a result of this change. The Working Longer Groups have produced a series of products designed to help address the challenges that managing an ageing workforce might bring.

This resource is divided into 6 sections. Each section covers a particular topic. The sections do not need to be read in a given order, but reading all of the sections will help to provide a rounded view of the subject and the help available.

Section 1 – Managing an Ageing Workforce – The Key Issues

As the workforce ages, organisations will need good age management practices to meet the needs of all staff.

The Advisory, Conciliation and Arbitration Services (ACAS) defines good age management as being 'those measures that combat age barriers and promote age diversity'. This includes being aware of rights and responsibilities; awareness of team composition and existing issues; the provision of flexible working; good recruitment and retention practices; supporting health, safety and wellbeing; and encouraging informed retirement planning.

This section includes key issues to consider, actions to take forward and links to useful information and resources.

Key issues

- Proactive age management is required to ensure older workers can continue to work to the best of their ability in fulfilling and productive ways as they age.
- Managing a multigenerational team will require a more flexible approach to work organisation, task management and rota/shift planning.
- Although not all workers will experience health issues, the Work Foundation has forecast that one in three workers will be experiencing chronic ill health by 2020.
- It has been proven that the most effective actions to allow staff to continue working are early intervention, discussion and planning the support they will need.
- Flexible working, including different work patterns, will support older workers to work to a higher pension age.
- Helping staff to make plans for their future career and retirement at an early stage, including consideration of flexible retirement options, is essential so they can make informed decisions.
- Organisations should aim to work with staff to facilitate their further development or working in a different capacity later in their working life. This may include consideration of and collaboration with the wider healthcare economy.
- Recruitment and retention of older staff is essential as the inflow of younger workers decreases and the age of the NHS workforce increases.
- Research has shown that older workers report feeling undervalued and not respected by managers and their co-workers in the workplace. Many feel they are discriminated against because of their age.
- Age is a protected characteristic under the Equality Act 2010.
- NHS staff reflect society and as age-related health issues emerge in later life your staff may experience the same challenges. Staff in this situation may satisfy the legal definition of disability, also a protected characteristic under the Equality Act 2010.

- The stereotype of an older worker is usually untrue and insulting to older staff.
- Older workers are entitled to have equal access to flexible working and training opportunities. These are key retention tools.

Key actions

- It is useful to monitor all decision making by age. For example, the allocation of flexible working, or training and development opportunities.
- Consider age awareness training for you and/or your staff.
- Ensure you are familiar with your organisation's flexible working and disability policies.

Useful information and resources

NHS Scotland Partnership Information Network (PIN) Policies
(www.staffgovernance.scot.nhs.uk/partnership/partnership-information-network/pin-policies/)

ACAS Guidance – Managing Older Workers
(www.acas.org.uk/media/pdf/f/i/Managing-older-workers-a-report-for-acas.pdf)

ACAS Guidance – Older Workers: Rights at Work
(www.acas.org.uk/index.aspx?articleid=5075)

Age UK Guidance – Your Rights at Work
(www.ageuk.org.uk/work-and-learning/discrimination-and-rights/your-rights-at-work/overview/)

HM Government Guidance - Employing Older Workers
(www.gov.uk/government/publications/employing-older-workers-an-employer-s-guide-to-today-s-multi-generational-workforce)

Section 2 – Supporting Your Staff

An ageing workforce means that capability changes will impact on teams and organisations. Supporting an ageing workforce to work longer can require changes to the working environment and job design to enable everyone to work safely and as effectively and productively as possible.

Age profiling your organisation, including individual departments and teams, helps your organisation understand the age demographics of the workforce and where attention needs to be focused.

This section includes key points to consider, actions to take forward and links to useful information and resources.

Key points

- Age profiling allows you to take a clearer look at the age of your workforce at an organisational, departmental or team level, now and in the future.
- Consider management development opportunities that focus on multigenerational team working to help you develop a supportive working culture for all ages.
- Older staff often report feeling disadvantaged by managers who do not recognise their ongoing need for continuous personal development (CPD).
- Older workers continue to have learning and development requirements so it is important that managers include them when prioritising their teams' training needs.
- Discussions that cover career/work, future aspirations and retirement plans are an essential part of the management relationship – regular contact and discussion will help staff feel supported to make informed decisions.
- Some managers feel reluctant to deal with under-performance of older workers. However, leaving someone to perform poorly in the years running up towards retirement and then letting them finally retire can be costly, and is arguably discriminatory and certainly unfair to them and to their team members.

Key actions

- Ensure appraisals and manager/employee discussions are held regularly.
- Regularly monitor the age profile of your team.
- Be aware of how management decisions you are making may be influenced by age, including access to CPD.
- Use performance management processes fairly and equitably – but do not use someone's age as a reason to justify or tolerate poor performance, or to insist on different levels of performance than would otherwise be expected.
- Take a supportive approach and consider whether a flexible attitude to working patterns or job design would be helpful if someone is finding performance difficult.
- Review work organisation and job design in consultation with staff who may be experiencing (or may be likely to experience) barriers to their ongoing employment.
- Include further plans and retirement aspirations as a standard part of one to one and appraisal discussions.

Useful information and resources

NHS Scotland Partnership Information Network (PIN) Policies
(www.staffgovernance.scot.nhs.uk/partnership/partnership-information-network/pin-policies/)

Working Longer Group Age Profiling Tools – Profile Your Workforce by Age
(www.stac.scot.nhs.uk/working-longer-in-nhsscotland/scottish-working-longer-resources/age-awareness-toolkit/2-profile-your-workforce-by-age)

Section 3 – Health and Wellbeing Issues

With an ageing workforce and employees working for longer it is vital that organisations have good occupational health and safety provision in place, and that appropriate action is taken to support the wellbeing of all staff.

This section includes key points to consider, actions to take forward and links to useful information and resources.

Key points

- Older staff generally tend to have less frequent periods of sickness absence, but when they do get ill they tend to be off longer than average.
- A proactive occupational health department running health promotion activities has a vital role to play in keeping staff of all ages fit and healthy for work.
- Reasonable adjustments older staff may require to enable them to continue working (in the same way that such provisions are made for disabled employees) are often simple to implement and low in cost.
- Appropriate job re-design and work re-organisation can be important factors in ensuring the continued health and wellbeing of older workers.
- Be mindful of the cumulative impact of years of stress and heavy workloads, and the particular effects these can have on older workers.

- Likewise, ensuring younger workers' health and wellbeing will help them later in their working life too.

Key actions

- Be open to discussing changing needs regularly with staff, including potential changes to work organisation/work patterns.
- Be aware of the range of support available within your organisation and make sure your staff are also aware and are encouraged to access it.

Useful information and resources

NHS Scotland Partnership Information Network (PIN) Policies
(www.staffgovernance.scot.nhs.uk/partnership/partnership-information-network/pin-policies/)

Health, safety and wellbeing partnership group (HSWPG)
(<http://www.nhsemployers.org/your-workforce/retain-and-improve/staff-experience/health-work-and-wellbeing/protecting-staff-and-preventing-ill-health/partnership-working-across-your-organisation/partnership-working-on-health-safety-and-wellbeing/hswpg-publications-advice-and-resources/working-longer-in-the-nhs>)

Health and Safety Executive (HSE) Guidance – Health and Safety for Workers
(www.hse.gov.uk/vulnerable-workers/older-workers.htm)

Section 4 – Flexible Working

Flexible working can include (but is not limited to) job content, variety of work, location, start and finish times.

It is not just about part-time working and can provide some of the solutions needed to maintain a well-motivated workforce.

Managers can find it difficult to balance conflicting requests for flexible working and to meet the needs of the service, but by being open to discussion and negotiation with employees, solutions will often come from staff themselves.

This section includes key points to consider, actions to take forward and links to useful information and resources.

Key points

- Employing lots of part-time staff or job sharers can seem time consuming for managers, but it can bring many benefits. Staff often feel more committed and energised when they have achieved the work/life balance they need, and this has been demonstrated to have links to greater productivity.
- Any additional workload for managers in terms of appraisals/time off for training can be balanced against a reduction in costs and management time spent on recruitment and managing sickness absence.
- If you are not sure whether a new working arrangement will be right for your service, you can have a trial period to see whether any

problems arise and discuss with staff how to resolve them.

- There is clear evidence from the work undertaken by experts such as Professor Michael West that quality employment leads to quality outcomes for patients, including lower mortality and greater patient satisfaction.

Key actions

- Check your internal policies and processes to see what commitment your organisation is giving to providing flexible working opportunities for staff at all grades.
- If you are finding it difficult to meet a variety of flexible working requests from staff, find out whether there are other options, for example for shared posts, by linking with managers in other parts of your organisation.
- Make sure you monitor your decisions, taking account of the age profile of your team. For example; which staff have been given CPD opportunities; which staff have had flexible working requests agreed.
- Encourage your staff to come up with suitable solutions themselves while making clear that you are open to any suggestions they may come up with.

Useful information and resources

NHS Scotland Partnership Information Network (PIN) Policies
www.staffgovernance.scot.nhs.uk/partnership/partnership-information-network/pin-policies/

Section 5 – Recruitment and Retention

Supporting the changing health and wellbeing needs of older workers will go a long way towards helping to ensure their retention.

This section includes key points to consider, actions to take forward and links to useful information and resources.

Key points

- The age profile of entrants to NHS employment is rising. For example, the average age of a student nurse is now 28. Therefore, it is not always possible to assume that younger workers will fill the gaps left by older workers as they retire.
- A positive, proactive and supportive approach to management of workers as they age will encourage greater retention, reduced recruitment costs and retain organisational knowledge and intellectual history of the service, cited by the Francis report as important.
- Flexible working arrangements and good job design can also ensure that workers are able to remain in employment as they age, allowing them to retain a good work/life balance e.g. as their caring responsibilities may increase.

Key actions

- Take positive steps to demonstrate how highly you value older workers. Being seen to be supportive of requests for flexible working or training, for example, will go a long way to encouraging other staff to raise their own needs with you.

- Recognise the importance of retaining the skills and expertise of older staff. Staff wishing to reduce their hours or who feel unable to continue in a physically and/or mentally demanding job can have a lot to offer more junior and less experienced staff in different ways.
- Make sure that you maintain regular dialogue with older workers so that they know you are open to discussions about how to accommodate their changing needs and any requests will be met positively.
- Challenge your unconscious bias and think about the language used in job adverts and person specs for example. Avoid use of words such as young, lively, or energetic.
- Include organisational values where relevant and make it clear that you welcome applications from a range of people including older workers.

Useful information and resources

NHS Scotland Partnership Information Network (PIN) Policies
[\(www.staffgovernance.scot.nhs.uk/partnership/partnership-information-network/pin-policies/\)](http://www.staffgovernance.scot.nhs.uk/partnership/partnership-information-network/pin-policies/)

Public Health England Briefing – Increasing Employment Opportunities and Retention for Older People
 [\(www.gov.uk/government/uploads/system/uploads/attachment_data/file/355783/Briefing5d_Employment_of_older_people_health_inequalities.pdf\)](http://www.gov.uk/government/uploads/system/uploads/attachment_data/file/355783/Briefing5d_Employment_of_older_people_health_inequalities.pdf)

Section 6 – Retirement Planning

Retirement is less likely to be a “cliff edge” event nowadays, with people choosing to move into this stage of their life gradually and reducing their work commitments slowly over a period of time.

Good age management now includes ensuring that there is a safe and dignified transition into retirement.

This section includes key points to consider, actions to take forward and links to useful information and resources.

Key points

- It is okay to ask your staff about their future work and retirement plans so long as it is done in a supportive way and could not be misconstrued as expressing a wish for them to leave.
- The ideal opportunity for this kind of discussion to take place within the normal one-to-one meetings and appraisal reviews.
- Mid-life career reviews have been found to be a very effective as well as beneficial for staff considering their future plans.
- The NHS Pension Scheme has a number of flexibilities that allow people to either work differently in the run up to full retirement or to retire and then return to work. However, many staff are not aware of these opportunities.

Key actions

- Check your local retirement policy and ensure you understand about the process and opportunities it presents.
- Make sure you understand pension and flexible work options in advance of talking with your staff – and know where to refer them to for further pensions advice.
- Recommend mid-life career reviews or pre-retirement courses to staff.

Useful information and resources

NHS Scotland Partnership Information Network (PIN) Policies
(www.staffgovernance.scot.nhs.uk/partnership/partnership-information-network/pin-policies/)

National Institute of Adult Continuing Education (NIACE) – Mid-life Career Review
(<http://shop.niace.org.uk/midlife-pilot-findings.html>)

NHS Scotland Working Longer Group – Age Awareness Toolkit
(www.stac.scot.nhs.uk/working-longer-in-nhsscotland/scottish-working-longer-resources/age-awareness-toolkit)

NHS Scotland Working Longer Group – Flexible Retirement Hub
(www.stac.scot.nhs.uk/working-longer-in-nhsscotland/scottish-working-longer-resources/age-awareness-toolkit/1-get-started/flexible-retirement-hub)