



Working  
Longer in  
**NHS**  
SCOTLAND

# The ageing workforce: checklist to assess organisational readiness



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# Introduction

This checklist was originally produced by the UK NHS Working Longer Group and has been adapted for Scotland by the Scottish NHS Working Longer Group. It aims to help you assess how age aware your organisation currently is and to help you action plan for the future. It is a stage in the continuous improvement cycle which should be repeated regularly to track improvements and continue action planning for success.

## Who should complete the checklist?

It is recommended that HR directors take overall responsibility for this piece of work drawing on other HR officers, workforce planners and business analysts to assist with assessment. Organisations may choose to task departmental or sectional managers to complete the assessment in their area and then collate assessments and action plans to create a wider, organisational response.

It is also recommended that this work is taken forward in conjunction with local staff side partners through your Board's Partnership Forum.

## How to use the checklist

The checklist is designed to help you consider how aware and prepared your organisation is for the opportunities and challenges an ageing workforce might bring. Under each of the headings below are a number of indicators of good practice. Use these to assess your current performance and action plan for the future. You should also record the evidence and findings that you have and consider gaps in evidence in your action plans. There are a list of useful links at the end of each section which will be helpful to you when considering the areas.

It is not expected that organisations will excel or even achieve all of the indicators immediately but you should consider them as inspiration for future action. Some organisations may consider that some of the indicators are not suitable for them, but in this event it is recommended you understand thoroughly the opportunities and benefits that may be missed by excluding them.

# 1 Age profiling

Having a detailed understanding of the age demographic profile of your organisation, overall and at departmental/sectional level, is the fundamental building block in age awareness.

An age aware organisation:	Yes	More work required	Unsure	No
has good data management processes in place and is confident that its data is complete and clean				
uses the WLG age profiling tool or similar				
shares and discusses demographic reports with the board, senior managers, workforce planners and all leaders across the organisation				
shares and discusses the report in partnership forum meetings and plans actions and interventions as necessary.				

## Useful links

Age profiling tool: [Scottish Terms and Conditions Committee \(STAC\)](#)

# 1 Age profiling continued



Use the space below to record observations and findings

Action planning – what do you need to do to improve in this area?

## 2 Workforce and service planning

It is essential that managers and leaders responsible for workforce and service planning have a sufficient understanding of the impact an ageing workforce may have and are equipped to consider those impacts. You can support this by offering age awareness training as well as by sharing the information and data described in the age profiling section.

<b>An age aware organisation:</b>	<b>Yes</b>	<b>More work required</b>	<b>Unsure</b>	<b>No</b>
ensures workforce and service planning is informed by up to date age demographic data on the whole of the current workforce				
ensures that all managers and leaders involved in workforce and service planning, either on an organisation wide or departmental level are age aware and use this knowledge to inform their plans				
uses exit and retirement information, where it is available, to help shape future recruitment and retention plans				
understands the impact workforce demographics can have on all business/operational planning activities				
ensures that all managers and leaders involved in service redesign and reconfiguration, either on an organisation wide or departmental level are age aware and use this knowledge to inform their plans.				

### Useful links

**Age discrimination:** access guidance from ACAS

**Avoiding the demographic crunch: labour supply and the ageing workforce:** see the report from CIPD

## 2 Workforce and service planning continued



Use the space below to record observations and findings

Action planning – what do you need to do to improve in this area?

### 3 Employment policy and practice

Supporting an ageing workforce requires sound, responsive and flexible employment policy and practice. It is not always necessary to create new policies or ways of working, it is better to ensure that the employment offer is appropriate and that staff can make use of the available options at all stages of their working lives.

An age aware organisation:	Yes	More work required	Unsure	No
has appropriate policies covering, for example, work life balance, flexible working, flexible retirement, carers leave, reasonable adjustments and redeployment that take account of workforce profiling and the need to support an ageing workforce				
ensures all policies are agreed in partnership				
ensures that all policies are monitored and evaluated regularly so there is equity of access for all staff across all age ranges (e.g. applications for and decisions on flexible working are reported by age so there is no discriminatory practice)				
makes age awareness training available for all line managers and trade union representatives				
supports line managers to take advantage of management training and resources that relate to managing a multi-generational workforce.				

#### Useful links

Staff Governance PIN Policies



### 3 Employment policy and practice continued



Use the space below to record observations and findings

Action planning – what do you need to do to improve in this area?

# 3 Employment policy and practice continued

## Useful links

[Staff Governance PIN Policies](#)

[Workplace adjustments](#): access the guidance from the Equality and Human Rights Commission (Britain)

[Health management for older workers](#): access the age management training from Ageing at Work

[Age audit](#): use the survey tool from ACAS to help assess employee attitudes toward age in your organisation

[Flexible working](#): access the right to request flexible working guidance from ACAS

[Managing older workers](#): access the employer toolkit for managers of older workers from the Department for Work and Pensions (Age Action Alliance)

[Employment advice](#): access help and advice from Carers UK

## 4 Occupational health, safety and wellbeing

Age affects everyone differently, but organisations need to be alive to the potential consequences of more staff working to an older age. This is predicted to mean an increase in the incidence of chronic disease within the workforce with one in three experiencing health challenges such as arthritis, type 2 diabetes, cardiac problems and the early stages of dementia. Age aware organisations will already have knowledge of the benefits described within various health and wellbeing reports such as the Boorman report and will want to consider their occupational health response in light of the ageing workforce.

An age aware organisation:	Yes	More work required	Unsure	No
allows all staff to self-refer to occupational health and counselling/employee assistance programme services where possible				
offers an occupational health service that supports preventative health education and well-person services and encourages staff to take advantage of these services				
is equipped to support an increasing number of staff with chronic disease and has fast track early intervention services such as physiotherapy and counselling available to all.				
promotes effective health and wellbeing strategies with initiatives targeted at different age groups of staff where data suggests this will be beneficial				
monitors uptake of all occupational health services and initiatives by age and takes remedial action if necessary to ensure equity of access and service provision.				

### Useful links

[Staff Governance PIN Policies](#)

[Supporting older workers with health conditions to remain active at work](#): access the paper from the Work Foundation on living long, working well

## 4 Occupational health, safety and wellbeing continued



Use the space below to record observations and findings

Action planning – what do you need to do to improve in this area?

# 5 Job design and the working environment

An ageing workforce does not automatically mean there will be incapability but it can mean that capability changes. 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.

An age aware organisation:	Yes	More work required	Unsure	No
carries out regular risk assessments, personalised to the staff member where necessary and makes adjustments where necessary to ensure a safe working environment that takes account of the age demographics of the workforce and any age related issues for individual staff				
creates a working environment and culture where staff feel able to identify risks and problems and encourages and expects staff to work safely and effectively, utilising equipment and adapted ways of working where appropriate				
provides appropriate ergonomic equipment to take account of an ageing workforce and the cumulative effects of physical work demands that working longer can have				
has policies in place to support workers, where possible, to either move into new roles or redesign their current role or working patterns if age related issues are making their current job difficult				
monitors the effectiveness of the above steps in relation to retention and performance management.				

## Useful links

**Health and safety for older workers:** access the guidance from the Health and Safety Executive

**Health, safety and health promotion needs of older workers:** view the report from the Institute of Occupational Medicine

## 5 Job design and the working environment continued



Use the space below to record observations and findings

Action planning – what do you need to do to improve in this area?

## 6 Pension education and retirement planning

Studies show that the retention of older staff is enhanced by the provision of sound pension information and support in retirement planning. Contrary to popular belief, it is not forbidden to enquire about a staff members retirement plans, but such enquiries need to be handled tactfully in an environment where they cannot be misinterpreted as a wish for someone to leave.

An age aware organisation:	Yes	More work required	Unsure	No
has a dedicated pension expert within the finance, payroll or HR department who can act as a source of information for all staff or an officer who can signpost staff to a specific contact in the pension provider				
encourages managers to consider career progression and retirement planning tactfully in one to one meetings and appraisals				
provides access to retirement planning courses to all staff of all occupational groups				
promotes flexible retirement opportunities where possible and appropriate and recognises the benefit of so doing for the organisation and for staff.				

### Useful links

[Scottish Public Pensions Agency](#): for information on the pension scheme in Scotland

[Flexible retirement](#): access the resources from the Working Longer Group

[The benefits of working longer](#): this publication explains the benefits of working longer and helping people have fuller working lives from the Department for Work and Pensions

## 6 Pension education and retirement planning continued



Use the space below to record observations and findings

Action planning – what do you need to do to improve in this area?



# 7 Learning and development

In order for staff to work safely, effectively and productively it is essential that they have access to appropriate learning and development so that they can keep their skills, knowledge and competencies up to date. This is especially true for older staff who previously have reported being disadvantaged in this area by employers who do not recognise their ongoing need for continuous personal development.

An age aware organisation:	Yes	More work required	Unsure	No
offers midlife career reviews to all staff, undertaken by trained union learning representatives who use facilities time to deliver them. This allows for learning and development to be considered during appraisals for staff of all ages and appropriate plans made				
makes sure that appropriate learning and development is offered to all staff of all ages and expects staff of all ages to take up relevant opportunities				
monitors and evaluates take up of learning and development by age and occupational group				
has effective systems in place to ensure that when line managers make decisions on support for study (financial or time off) they do not discriminate due to the age of the staff member.				

## Useful links

**Mid-life career reviews:** access information from Union Learn on how to help older workers plan for their retirement

## 7 Learning and development continued



Use the space below to record observations and findings

Action planning – what do you need to do to improve in this area?

## 8 Staff experience

To be able to develop a thorough and effective age management strategy, employers will need to understand fully the experience and engagement of their staff across all age ranges.

An age aware organisation:	Yes	More work required	Unsure	No
ensures that national staff surveys are analysed by age and actions planned accordingly where disparity of experience is found				
commits to analysing internal surveys by age, and occupational group				
commits to increasing participation where differences are noted in the age range of respondents by working with trade union representatives and staff networks to promote the benefits				
supports the development of dedicated staff networks such as for older staff, carers, grandparents, and those with disabilities for example.				

### Useful links

**Mid-life career reviews:** access information from Union Learn on how to help older workers plan for their retirement

## 8 Staff experience continued



Use the space below to record observations and findings

Action planning – what do you need to do to improve in this area?

# Summary

Now that you have assessed your current performance for each of the indicators of good practice, use the checklist below to assess your overall readiness for each area.

	Fully met	More work required	Unsure	Not met
Age profiling				
Workforce and service planning				
Employment policy and practice				
Occupational health, safety and wellbeing				
Job design and the working environment				
Pension education and retirement planning				
Learning and development				
Staff experience				

Once you have completed the assessment of the indicators you should find you have a better understanding of how prepared your organisation is to meet the challenges and take advantage of the opportunities an ageing workforce may bring.

Repeat the assessment process regularly to make sure you continue to improve in all areas.

