

DECEMBER 2014

CITY HOSPITALS SUNDERLAND NHS FOUNDATION TRUST USING FLEXIBLE RETIREMENT TO SUPPORT OUR WORKFORCE PLANNING

This case study outlines the trust approach to workforce planning and the efforts they have made to allow staff to utilise flexible retirement options.

Background

Jan Armstrong is the Deputy HR Director at City Hospitals Sunderland NHS Foundation Trust which is an acute trust. The trust provides a wide range of hospital services for a population of 350,000, such as accident and emergency, surgical and medical specialties, therapy services, maternity and paediatric care.

The trust has over 5,000 staff working from a variety of sites with an annual income in excess of £320 million. Of the 5,000 members of staff, over 4,500 are in the NHS Pension Scheme.

Age profiling the workforce

With the number of staff aged over fifty increasing each year, the trust have used [age profiling data](#) to assess the potential impact on service delivery. An assessment is carried out on a regular basis in line with workforce planning.

By utilising age profiling data in areas where the average age is higher than others, for example the estates department and nursing, where a large proportion of staff are aged fifty and over, it has been possible to estimate the likelihood of retirement requests being made. The data can also support planning to predict any likely trends or patterns in particular work areas.

This has supported succession planning, retaining staff whilst training new staff and sharing skills and experience. In addition this supports the retention of key skills where there are particular shortages.

Utilising flexible retirement

In other areas such as obstetrics and gynecology services, flexible retirement supports succession planning into various roles. For example, a midwifery team leader taking flexible retirement and either stepping down or returning on a job share basis can support and coach newly appointed team leaders.

Flexible retirement of longer serving midwives who have historically held the role of Supervisor of midwives has resulted in some of these staff retiring from their post as Supervisor of midwives, therefore allowing new staff to be trained to progress into these senior roles. The staff member then returns to NHS employment in the same profession but at a lower grade, following their retirement.

In hard to recruit areas, for example due to local skill shortages of trades personnel - plumbers and electricians, [flexible retirement](#) has been key to retaining an effective workforce and saved costly premiums in recruitment exercises and having to source staff via agencies, which can prove expensive.

Reviewing requests

All requests for flexible retirement are reviewed based on current and future service needs, the skill set of the staff member, the impact on the service and whether it will leave a skills gap. The trust receives approximately five requests to retire and return each month. In addition, when a request for retirement is received, the trust encourages staff to consider all available options as it may be that the staff member has been unaware of the full range of options and/or has not considered the alternatives available to them.

In every case, the benefits to the staff member are taken into account in order to promote a positive work/life balance and allow them to continue with their employment in a way that suits their needs, ensuring they feel valued. In some cases the release of a staff member's pension can ease financial issues to allow the staff member to continue working in a role they enjoy whilst benefiting from drawing their pension benefits.

In some cases flexible retirement has been utilised to assist with caring responsibilities or health issues, where a shorter working week (together with the release of pension) has been beneficial. This limits the financial

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impact on the individual whilst retaining valuable skills in the workforce. In these situations staff can utilise the wind down option, to reduce their working hours or retire and return to NHS employment on reduced duties. These arrangements can support organisations who require changes to the workforce, such as a reduction in staff hours or the number of posts. These changes can be accommodated through flexible arrangements thereby minimising the impact for the wider workforce.

When discussing flexible retirement options with staff, there are a wide range of options that can be considered in order to find an agreed approach, which works for both the staff member and the trust. If mutually agreeable to the benefit of the staff members and the organisation, the terms of any flexible arrangements are usually agreed for a fixed term period. Where there are existing service reviews and there is the possibility of a reduction in headcount, the use of flexibilities for a fixed term period reduces the need for any compulsory redeployments and therefore assists in headcount reduction via natural means.

Impact on sickness absence

In Jan's view, the trust had not seen any negative impact on individual sickness absence where staff had retired and returned. In some cases, flexible retirement has served to support health and wellbeing and improve attendance through promoting a more positive work/life balance.

Raising awareness

The trust offers pre-retirement workshops and seminars to provide staff with more information about the scheme and the opportunity to ask questions. Of the attendees, 25 per cent are aged fifty or over.

These workshops alongside the staff intranet, provide an opportunity for staff to learn about the options available. The NHS Pension Scheme and local trust benefits are promoted through the Total Reward Statements, which staff have access to via their ESR Self Service account and the trust has worked hard to encourage staff to access this and to raise awareness of the benefits of working for the NHS.

The information available on pensions also extends to cover pension scheme changes, such as; [automatic enrolment](#), [Choice 2](#) (October 2014 – March 2015), [new 2015 scheme](#) and [Total Reward Statements](#).



Benefits

There are benefits of flexible retirement to both parties; the trust retains key skills and valued members of staff, as well as making potential cost savings on salary and pension contributions. The trust can secure the benefits of retaining knowledgeable, experienced staff whilst supporting wider workforce and succession planning.

Staff expectations can be managed where their future planning is concerned, both from a financial and psychological perspective and they can make clear plans to approach full retirement flexibly, in order to meet their individual needs.

Top tips

- Consider how flexible retirement options can support your overall workforce planning
- Utilise age profiling data to identify any potential opportunities for your trust
- Provide staff with as much information as possible through a variety of channels
- Hold pre-retirement workshops and encourage attendance from all age ranges
- Ensure line managers are aware of the options and are encouraged to have conversations with staff
- Encourage staff to consider the flexible retirement options available when approaching retirement.

Contact us

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Published May 2014
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