

Working
Longer in
NHS
SCOTLAND

The ageing workforce: engagement approaches for your organisation



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The ageing workforce

The NHS Working Longer Group (WLG) identified the need to raise the profile throughout the NHS of the challenges and opportunities the ageing workforce will present. The aim being to make sure organisations are aware of what steps they need to take to ensure that employees are supported and enabled to work safely to a later, raised retirement age.

This resource provides you with learning from NHS organisations who piloted a variety of engagement approaches within their organisation on the opportunities and challenges associated with the ageing workforce. There are a range of suggested approaches for you to consider when planning your own engagement with employees, senior management and trade union colleagues. You will also find a checklist for planning an engagement event. This resource will help you to begin your own organisation wide conversation about working longer and the ageing workforce.

Did you know?

- 53.4% of the NHS workforce are now aged 45 and above
- The average age of the NHS workforce is 44.2
- 97.8% of the NHS workforce have a state pension age of between 65 and 68 under the new SPA arrangements
- 77.0% of the NHS workforce have seen their state pension age increase to between 65 and 68 under the new SPA arrangements

Why should you engage with your organisation about the ageing workforce?

Working longer and the ageing workforce is an issue that your organisation needs to face today to prevent future workforce challenges, it is not something that should be dealt with in isolation. Raising awareness will help facilitate:

- cultural and behavioural change
- changes to policy and practice that support and enable employees to work longer, safely.

When considering how you could engage with your organisation on this topic, one solution might not fit all. It is crucial that you have a picture of your local workforce demographics in order to assess which approach best suits you. The age profiling tool in the Working Longer section of the [Scottish Terms and Conditions website](http://www.stac.scot.nhs.uk/working-longer) (www.stac.scot.nhs.uk/working-longer) will help you to do this.

Many commentators, including The Age and Employment Network (TAEN), promote the need for a comprehensive age management strategy where age awareness is a thread that runs through all employment policy and practice.

Who should you engage with?

Senior management team

It is important that your senior management team are aware of the challenges and opportunities an ageing workforce presents to your organisation. It will impact on areas including workforce planning, succession planning, staff engagement, retention, the delivery of care and much more. It is important that your senior team are prepared to action changes that may be required to practices and policies to support your workforce.

We have created a presentation slide pack which is for use with your senior management team. The template slides contain national information relating to workforce demographics, pension scheme changes and information about the WLG. The presentation is available at www.stac.scot.nhs.uk/working-longer and can be an excellent tool that can be tailored to include specifics about your organisation and workforce demographics.

The workforce

By engaging with your workforce on this issue, you will be able to understand more about how your staff feel about working longer and gather ideas and practical solutions to enable and support them as they do this.

Engaging with staff on this topic will allow you to:

- dispel **myths** about working longer
- contribute towards necessary cultural shifts within your organisation
- encourage your staff to engage more in their future retirement planning and choices of working patterns
- provide clarity for your managers and staff side representatives about the level of support your staff will require
- help to identify what work needs to be done to prepare your organisation
- highlight areas of your organisation that may require further support.

More than a third of people aged 50+ want to work part time or have flexible hours before retiring*

Pilot engagement approaches

The UK Working Longer Group piloted a number of different engagement approaches through its steering group members and their organisations. These were also supported by trade union representatives. The engagement approaches were referred to as 'big conversations' with the intention of drawing out the views and opinions of staff, managers and employers. They also provided a way to inform the organisation about what needed to be done to support those impacted by the changes, and to help identify what steps the organisation needed to take to make sure that employees are supported and enabled to work safely to a later retirement age.

Pilot approaches were rolled out in the following organisations:

- East Cheshire NHS Trust
- Tees, Esk and Wear Valleys NHS Foundation Trust
- NHS Wales.

The engagement approaches were positively received and organisations felt that the approaches used were valuable for raising awareness, and to begin the process of addressing some of the challenges faced with an ageing workforce. Feedback from the pilots has helped to inform this resource. Further detail of each of the pilots can be found below.

*YouGov poll December 2014 (UK)

East Cheshire NHS Trust

East Cheshire NHS Trust held an engagement event in conjunction with the trust's local Clinical Commissioning Group and the Local Authority. This approach recognised that the healthcare workforce will move around the local care system in the future.

The event was attended by a range of staff including executives and directors, a cross section of the workforce, trade union representatives, training and development leads, HR business partners and representatives from community, charity and volunteer groups.

During the event, three group discussions took place to capture the thoughts of attendees on the impact working longer will have on them, their teams and their organisation. The purpose of these discussions was to also explore possible solutions and approaches that could be implemented.

- Discussion one provided an opportunity for attendees to offer their thoughts and feelings about working longer.
- Discussion two moved on to what was needed to enable and support staff to work longer.
- Discussion three asked what actions needed to take place to make these ideas a reality.

The event also included a discussion between a panel of leaders from within the local health economy including external experts on this topic, and trade union representatives. Attendees were able to ask questions which the panel discussed.

What has happened since the event?

- The regular development sessions which are held at the local partnership forum and attended by employer and trade union representatives now include working longer specific topics.
- Regular reviews of the workforce demographics are undertaken to identify areas which may require further support with workforce or succession planning.

The section on **what to consider when planning an engagement event** and the [event checklist](#) will help you when planning an event.

Tees, Esk and Wear Valleys NHS Foundation Trust

The HR director delivered several presentations to senior leaders within their local region on the implications of the ageing workforce and what this meant for their organisation.

The principal aim of the presentations was to generate senior local engagement about the ageing workforce and raise awareness of issues specific to their workforce. The presentations enabled a discussion which identified what the organisations future approach to the issues raised by the WLG could be. There was also the opportunity to feedback information about current local practice and thinking.

In total, 200 people attended the presentations that were given within a trust board seminar and regular network meetings. These also involved group work following each of the presentations. The organisations trade union representatives were directly included in the engagement process.

As a result of these presentations, senior leaders asked that the ageing workforce be investigated further by the trust's executive team as part of the normal business planning process. A task and finish group was established, which met regularly to agree a number of recommendations for the trust. The executive team have signed off several actions, including but not limited to the following:

Commissioning of electronic surveys on age inclusivity

The results of these surveys have been used to gauge awareness of the issues of an ageing workforce. The results highlighted differences in awareness.

Staff focus groups

Small meetings took place with a broad cross section of staff members to find out how they feel about working longer and to investigate what actions staff feel the organisation can take to enable them to work longer.

Review of policies and practices

The trust has committed to including considerations for older workers when reviewing any policies or practices. The trust have reviewed their sickness absence policy, flexible working procedure and the workforce strategy to include considerations relating to older workers.

Reporting about age statistics

The trust now regularly includes age related demographic information in senior management level reporting. This means that the issue of an ageing workforce becomes business as usual, but the effects and implications are still highlighted. It also makes sure that working longer is on the agenda of the trust's senior management. This approach has highlighted which areas of the trust may need further support and succession planning.

Pension planning sessions

The trust has scheduled pension planning sessions. These are designed to encourage staff to consider their retirement options throughout their career and to normalise conversations about retirement plans and options.

Tailor the presentation slide pack found at www.stac.scot.nhs.uk/working-longer to include your organisations workforce demographics so that you can present the specific challenges and opportunities facing your organisation to your senior management team.

NHS Wales

NHS Wales strategic workforce strategy 'Working Differently, Working Together', includes four work streams looking to support NHS Wales with the development and delivery of products which can be used across the service.

One of the objectives of the strategy is: A sustainable and skilled workforce focussed on helping the people of Wales to improve their health as well as treating sickness.

This objective recognises that the NHS workforce is a sub set of the wider population of Wales in terms of health and wellbeing and links to wider strategies that support health gain. It identifies the key employment practices that will make NHS Wales the employer of choice and specifically focuses on:

- promoting the health and wellbeing of staff through a range of work based initiatives
- linking to wider strategies to support health gain for staff
- effective recruitment and retention strategies
- links to wider strategies to support health gain, including widening access and support of the long term unemployed into the health workforce
- consistent, flexible all Wales employment policies
- development of management skills for middle managers including the management of change
- effective job design.

Health and wellbeing of NHS staff has been identified as one of the key factors that underpins performance at work, engagement within the workplace and sickness levels. Working together, NHS staff and managers are designing products and interventions that support the workforce to maximise their wellbeing and in addition to help them become role models for the population of Wales. In support of this ethos a staff health and wellbeing charter for NHS Wales was launched. The charter states:

'NHS Wales is committed to encouraging the health and wellbeing of all its staff and recognises that staff act as role models to the community they serve in promoting and preventing ill health. It believes that it is the joint responsibility of managers and individual employees to work together to encourage healthier lifestyles and life choices, support each other in the work place, and promote the effective management of sickness when staff are prevented from attending work through ill health or are at risk of having to take sick leave.'

A number of actions have been undertaken as a result of their approach, including:

- Establishing the Working Longer Steering Group Wales to act as a reference point for NHS Wales to share information and good practice on working longer. The group meets quarterly and has an agreed programme of work including:
 - establishing a data set and ESR business intelligence reports to help organisations understand their local demographics
 - a communications strategy to engage with other national and Welsh groups on ageing workforce issues
 - the roll out of WLG **tools and resources** across NHS Wales as they become available.
- Holding workshops to raise awareness of the issues and opportunities of an ageing workforce amongst HR practitioners, workforce planners, senior management teams and trade union representatives.
- Establishing the health and wellbeing steering group to ensure a holistic approach to the implementation of the charter which includes specific wellbeing related interventions needed to underpin the findings of the WLG.

What to consider when planning an engagement event

The information in this section provides you with ideas for running your own engagement event. The **event checklist** includes at-a-glance suggestions of what you should consider when planning your event.

Local demographics

It is important to consider the current and future age demographics of your organisation. You can then share these at your event to highlight the specific challenges facing your organisation.

The age profiling tool (www.stac.scot.nhs.uk/working-longer) helps you take a clearer look at your workforce by age, now and in the future. It allows you to predict trends and identify areas where there may be a higher likelihood of retirement requests in the future.

Engaging key stakeholders

It is vital to have senior management support for your event. Attendance of senior management at the event also highlights the importance of the issue.

You should develop, plan, deliver and evaluate your event in partnership with your local trade union representatives to make sure of collaborative working and solutions. You could establish a planning and delivery group to lead this work.

'I found it easier to secure buy in from key stakeholders by engaging directly with them and highlighting the importance of addressing the issues of an ageing workforce now.'

Rachael Charlton,
WLG employer
side chair, East
Cheshire
NHS Trust

Attendance at your event

A successful engagement event needs to include a cross section of your workforce who are representative of your organisations age demographics. You should consider including:

- executives and directors
- a cross section of your workforce by staff type and age
- line managers
- local trade union representatives
- training and development leads
- HR business partners.

The format of your engagement event

Your event should be held in an open environment where individuals feel comfortable to offer their opinions. A basic set of ground rules should therefore be agreed and shared at the start of the event.

You could include group discussions where attendees think about specific topics relating to working longer and the impact for your organisation. You could use table facilitators to capture feedback ensuring discussions remain on topic. There are a range of suggested discussion sessions, questions and prompts below:

What impact will working longer have on me, my team and my organisation?

Prompt questions could include:

- How will patients feel about being treated by an older workforce?
- If our workforce is working longer what impact will that have on other areas e.g. volunteer workforce?
- What does this mean for the on call provision?
- Does working longer provide you with more opportunities for education and training?

- Does working longer provide you with more opportunities to change your career?
- How will having an older workforce impact on your team?
- How will having an older workforce impact on your organisation?

What is needed to enable and support working longer in your organisation?

- What options might there be for flexible working?
- Are there opportunities within your teams for staff to work flexibly?
- Are there opportunities for front line staff within your organisation to move to less physically demanding roles?
- How would more flexible working impact on other workers within the team?
- How do we make the best use of the skills and knowledge we have in the older workforce?
- Could these skills be used to support and train the younger workforce?

What actions need to take place to make these ideas a reality?

- What working practices and solutions would support an extension of working lives? For example, retirement planning, working patterns, environment.
- How can line managers prepare to provide this support to their staff?
- How can I as an individual prepare myself for working longer?

Promoting your engagement event

Communication is vital to ensuring the success of your engagement event. Developing a communications plan in advance will help you to make the most of the event and the outcomes. There are a range of areas to consider when planning your communications:

- Highlight why staff should attend and what they will gain from attending
- Which local communication channels can you use to promote your engagement event? Ideas could include:
 - intranet and screen savers
 - bulletins and staff newsletters
 - team meetings
 - through line managers
 - chief executives communications to staff
 - posters.
- How will you communicate the outcomes from the day? A clear set of key messages is a useful tool to reflect back to attendees the main themes arising from the event.
- How will you communicate resulting actions and changes to policy or practice to your workforce? It is important to make sure that staff remain up to date about the progress of work following your engagement event.

Your communications messages could include:

- By attending, staff can influence how your organisation approaches the challenges and opportunities that an ageing workforce presents.
- Staff will be directly contributing to the organisations strategies and working practices to support working longer.
- Your organisations aims – to develop and adopt positive approaches to extending working lives.
- By attending and participating in the event, the workforce can help shape what it means to be part of an age friendly organisation that

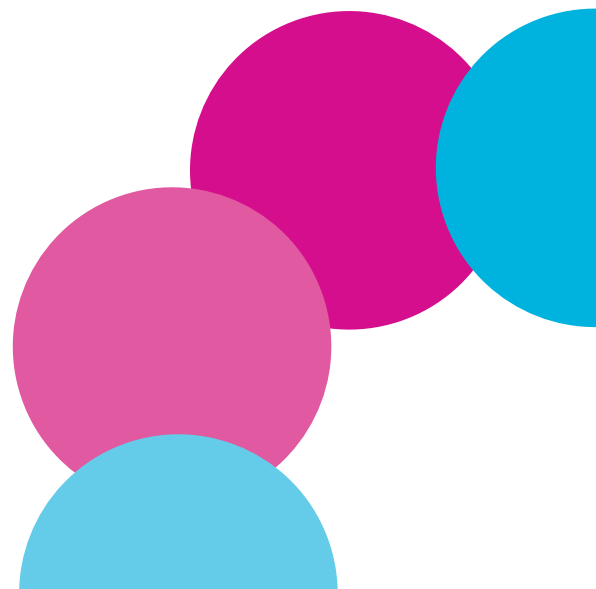
supports and enables employees to work safely to a later retirement age.

Alternative ways of engaging with your workforce

Holding an event in your organisation is just one way of raising awareness amongst your workforce. NHS organisations are using many different innovative ways to do this.

Sandwell and West Birmingham Hospital NHS Trust have used a variety of engagement and awareness raising approaches:

- **Ageing fact of the week** – a fact about ageing was included on the intranet each week which also linked to the flexible working policies within the organisation. This was intended to be thought provoking and informative.
- **An educational quiz on ageing** – questionnaires were circulated at events throughout the organisation and on the intranet. The aim of the quiz was to raise awareness of age and its associated health conditions. It also highlighted and dispelled some common myths around ageing and working to a raised retirement age. The quiz had a high response rate and results improved following the weekly ageing facts.
- **Planning for your retirement seminars** – the aim of the seminars was to guide employees through the financial complexities of retirement in a clear and jargon free presentation.



The seminars were available for all staff, facilitated via the occupational health and wellbeing department, and delivered in partnership with a financial services organisation. Retirement guides were obtained from The Money Advice Service and provided free of charge. The evaluation from the seminars was very positive with most staff reporting that they had been very informative and a useful means of planning for the future.

- **Musculoskeletal seminars** – the seminars were planned and developed as a targeted educational event that was aimed at increasing staff knowledge about managing common musculoskeletal conditions. ESR data was obtained on the workforce and ageing statistics sought from each divisional area within the trust. These were broken down into staff aged 46-65. Areas with a higher proportion of older members of staff were identified, because there was a higher percentage of staff within those divisions with musculoskeletal problems. The content delivered during the session included advice and management on musculoskeletal problems. The session was presented by the staff occupational physiotherapist and supported by the staff health and wellbeing facilitator. Staff feedback from the sessions was very positive.

York Teaching Hospital NHS Foundation Trust has established a task and finish group to bring together key stakeholders within their organisation to determine what actions they need to consider when looking at what the ageing workforce means for them. Dawn Preece, Deputy Head of HR has shared her experiences of establishing the group and what actions they are going to take forward linking to the recommendations contained within the [WLG preliminary findings and recommendations report](#). You can read the blog in the Working Longer section of the [Scottish Terms and Conditions website](#) (www.stac.scot.nhs.uk/working-longer).

Evaluating your engagement approaches

Raising awareness of the issues of an ageing workforce is the start of a journey towards changing the culture within your organisation and the wider NHS. A theme which emerged from the UK Working Longer Group is the need for a change in culture, to normalise discussions on careers aspirations and retirement plans within organisations, particularly between managers and staff.

Effective evaluation of your engagement approaches is important, to understand how successful your engagement has been and whether the approach should be replicated in the future. It also provides a good evidence base for your future outputs.

An evaluation plan will set out what you are going to measure, how you are going to measure it and when you are going to measure your activity. This could include the following stages:

1. Create an evaluation plan which includes the objectives, audience for the engagement and findings, any tasks and activities, performance measures, data sources, timelines and any risks or constraints
2. Collect evidence to enable you to measure performance
3. Analyse the data and evidence collected and reporting performance against the plan
4. Share your findings with others

Event checklist

This checklist includes suggestions of what you should consider when planning an engagement event

- ☐ **Planning and delivery** – have you established your planning/delivery group?
- ☐ **Format** – what format will your engagement event take? What questions will you ask?
- ☐ **Stakeholders** – who are your key stakeholders, have you engaged with them and are they able to support your event?
- ☐ **Communications plan** – have you developed a communications plan to communicate about the event, the outcomes from the event and resulting actions?

Does your plan include:

- advertising the event
- how to register to attend
- the agenda for the event
- why people should attend
- the benefits for individuals and your organisation
- communicating with managers about staff attendance
- how the outcomes will be communicated to your workforce
- how your resulting actions and changes to policy or practice will be communicated.

- ☐ **Logistics** – What is the agenda for the event? How long is the event? Where will you hold your event? Are you providing catering?
- ☐ **Attendees** – who are you inviting and how many are you inviting? Will staff be able to take time out of their day to attend the event?
- ☐ **Costs** – have you considered the costs of the event and planned these into a specific budget?
- ☐ **Facilitator** – do you require a facilitator to run the event on the day? Who will you use?
- ☐ **Local demographics** – how will you present your local demographics at the event?
- ☐ **Feedback** – how will you record feedback from attendees?
- ☐ **Evaluation** – how you will know if your event has been successful? What does a good event look like? Do you have an evaluation plan?

