Valuing older workers

A 10 step action plan for working in partnership to create a learning culture that supports staff who work later in life

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Introduction

By 2030 the number of people in England aged over 65 will go up by 50% and the number of people aged over 85 will double. This challenge has led to the removal of the default retirement age / increase in state pension age which will require all workers to work much later in life. There are currently around 12 million adults below State Pension Age heading towards an inadequate retirement income which will mean working far beyond the age they felt they might retire.

Working to an increased State Pension Age will impact on both the lives of individuals and the organisations they work in. In health care, where service provision can be physically and mentally demanding, working into your late 60s in some roles may prove untenable.

The NHS Staff Council and its Executive established the NHS Working Longer Group to address the impact of a raised retirement age on NHS staff, employers and the provision of health services. The group note that:

• the average age of NHS staff is 43.7 and is projected to rise to 47 by 2023

• with over half of the NHS population over 40 years old and a third over 50, the NHS workforce is ageing

• 70% of the current NHS workforce will have a higher pension age of between 65 and 68.

Whilst this specifically relates to NHS employers, we have no reason to doubt that this is not comparable in the independent sector, which may even attract an older demographic.

To create a learning culture, an organisation needs to challenge and change the perceptions about working later in life. It is vital that organisations make a commitment to managing and supporting an older workforce. Understanding the learning needs of the workforce should involve asking key questions, looking at the data available and having meaningful conversations that check out the real lived experience, hopes, fears and expectations of the workforce. By doing this, a meaningful short, medium and long term learning strategy can be developed which offers learning and development opportunities that can enable and empower individuals and the organisation to make changes that can nurture a positive learning.

An employer, working in partnership with unions, and particularly maximising the role of the Union Learning Representative (ULR), can make a huge difference in the development and implementation of any learning strategy. They are in the heart of the workplace, providing peer support to staff. They enhance an organisations learning offer by bridging the gap between ideas and implementation, ensuring that staff are engaged at every level.

Working later in life and supporting an older workforce is one of the biggest issues that health care faces over the next 20 years. We hope that all employers and unions, working in health care, can work in partnership to ensure that staff feel valued and prepared to lead long, healthy and rewarding careers.

Creating a positive learning culture that values older workers

Understanding, challenging and changing **PERCEPTIONS**

Developing and delivering a **LEARNING STRATEGY**

Raising awareness and making a **COMMITMENT**

Providing learning for the individual and the organisation

Planning
long and rewarding career pathways

Keeping healthy
and providing a healthy workplace

Getting ready for retirement
and planning the future workforce

Working flexibly
and managing a flexible workforce

Understanding the needs of the workforce and having meaningful **CONVERSATIONS**

Understand current **PERCEPTIONS** and temperature check your learning culture

Raise awareness and make a **COMMITMENT** to supporting staff to prepare to work later in life

Understand the needs of the workforce and have meaningful **CONVERSATIONS** to check out the lived experience against your learning needs analysis

Develop and deliver a **LEARNING STRATEGY** that provides learning for the individual and the organisation

Understanding and challenging perceptions

Step 1: Create a space for a discussion

It is helpful if, right from the outset of this work, you involve all relevant stakeholders in your initial discussions around your learning and development support for staff preparing to work later in life.

You may already have a negotiating forum such as a Joint Negotiating Committee (union representatives and managers from the organisation) or you might have a committee that is specific to learning, such as an education or training committee.

The important aspect is to have the key stakeholders from unions and the organisation who are able to take any actions forward or influence those who can. Key people would include workforce development leads / HR, representatives from all unions and Union Learning Representatives.

Step 2: Do a temperature check in your organisation

Have an honest and pragmatic view on where your organisation is in relation to supporting staff to prepare for working later in life.

What are the current perceptions of working later in life in your organisation? What is the cultural temperature? Every single member of staff, regardless of knowledge, skills or experience will get older and will need to plan for working later in life. Every organisation will need to think about their workforce and plan their service around a future where people are working longer. But what is the current reality?

What is the culture like in your workplace? How prepared are you for the future, both as an organisation and as an individual?

Acting now - the prepared few

There are a few organisations, and a few individuals that are ahead of the game. There are some excellent examples in other industries where there is a culture of supporting staff to work later in life.

There are also some forward thinking people that know exactly where they are headed and what they need to do now, to create the future they want.

Acting soon - something to tackle tomorrow

There may be some acknowledgment of a looming crisis. Sickness absence in older workers, capability issues and 'burn-out' may be all on the rise. A quick glance at the current age of the workforce might clearly indicate that great waves of staff might be due to retire in the same time period. While an organisation might see these issues looming, and plan to tackle them, current pressures and solving urgent issues can leave the aging workforce low down on the agenda.

For individuals, changes to pension schemes, personal health, caring responsibilities and stress in the workplace might make you consider 'Can I do this for much longer?' or 'Will I ever be able to retire?' but with little support or guidance, this may quickly be pushed to the back of your mind while they get through today..

Not on the radar - the blind spot

For most people, and organisations, the subject of working later in life only comes into focus as the reality becomes nearer. It is the ultimate 'tomorrow' topic and current pressures, challenges and issues take centre stage. This means that at worst, this might not be on anybody's radar. Services and support might be totally focused around a younger workforce and individuals may just be oblivious, or have incorrect assumptions about what their future looks like.

Making a commitment and raising awareness

Step 3: Make a commitment to and through a Charter for Older Workers or by developing a learning agreement

It may take a few meetings to get everyone signed up and on board, but once you do, you may consider signing up to an 'Charter for Older Workers' or a wider learning agreement. This is a formal commitment, between an employer and unions to work together to support older workers and all staff to consider and prepare for working later in life. You can use the information and model agreement at the end of this resource to help you.

Create a working group, or define a space where the key stakeholders from the employer and unions can work together to develop a strategy and set a clear timetable/action plan

Step 4: Celebrate your commitment and start to raise awareness

Once you have agreed your commitment, it is important to start to engage with staff. A celebration event is a great way to mark the start of your commitment and to let staff know that they have a role in helping you shape your learning offer and create a positive culture.

Consider how you will engage with staff and start to develop an engagement or communications plan.

Understanding the needs of the workforce and having meaningful conversations

Step 5: Data capture

You will need to understand the learning needs of staff before you will be able to begin to develop a learning strategy that supports staff to prepare for working later in life. There's no blanket learning offer that suits all the workforce that can just be picked up and rolled out. Your strategy or framework will need to respond to your staff, your service and the plans for the future. There are many influencing factors that can determine what learning provision is needed. Something

as simple as geographic location can mean a very different staffing demographic. A large city based acute hospital may have a vast, diverse and relatively young workforce in comparison to a community service in some of the more rural parts of the country.

Employers and unions will already have a large amount of data both in terms of your own organisation, and wider evidence about working later in life that can be used to determine what the learning needs might be.

Staff data and demographics	Details of the age, skills, roles and geographic placement of staff will provide a great baseline for determining who you will be supporting.
Staff engagement surveys	If you are part of the NHS, the Staff Survey and your organisations responses can give a valuable insight into current levels of engagement and satisfaction.
Engagement with learning and development	Understanding and analysing the current learning and development offer and how staff engage and respond can provide a good basis for understanding what is already in place and what works well. Unions can investigate their union provision and engagement in a similar way.
Sickness absence, health and wellbeing and early retirement	Employers and unions will have access to data from sickness absence records, early retirement and cases relating to the health and wellbeing of staff that can provide an interesting insight, when looked at through the lens of working later in life.
National data and research around working later in life	The NHS Working Longer group published their initial findings in 2014 which includes a wealth of data that can be drawn on to understand the national picture and what your organisation might need.

Step 6: Having meaningful conversations with staff

The data and research above will give you a good foundation but best way of determining what your organisation needs is to check that against the lived experience, hopes, fears and expectations of the people within the data. To understand what the current culture is, and how it can be moved forward, you need to commit to having open, transparent and meaningful conversations.

By demonstrating your commitment to work in partnership through a Charter for Older Workers or learning agreement, you will have opened a space for staff to begin to have meaningful conversations about how they feel and what they need to support them to prepare to work later in life.

There are several ways an employer can engage with staff and unions. The Union Learning Representative can play a vital role in nurturing a safe and supportive environment. It probably isn't helpful to collect even more data, but to try and engage staff through one-to-one or group sessions that explore the realities of working later in life in your service area.

It is important not to re-invent or add any cumbersome systems and processes to reach staff. The one-to-one and appraisal system can be used to start the conversation and would be a good place to signpost staff to their ULR. Union events and branch meetings can be used to open up a safe space for discussions and initiatives like Learning at Work Week, staff meetings, social events and existing learning and development sessions can be a great place to ask some key questions.

Step 7: Analysing the data

As a group, you can review all the data you have, both in terms of statistics/demographics, and lived experience. Once you have a good idea of what might be needed, you can start to develop your learning strategy.

Developing and delivering a learning strategy

Step 8: Agreeing the purpose, impact and learning interventions

Every organisation will have different needs and expectations from a learning strategy. Your group will need to decide what the overarching purpose of your strategy. You may wish to break this down into short, medium and long term purpose. Your data capture exercise will give you clear indicators of your priorities which you can, in turn, translate into a purpose for your strategy.

Once you have agreed the purpose, you should consider what the impact should be. In other words, how will you know you have been successful? What does the future look like? Once you know what your purpose, and impact should be, your group should have a clear idea about what learning interventions are needed to deliver that.

- **What are we trying to achieve?** Agree the overarching purpose of your learning strategy

- **How will we know that we have been successful?** Agree what the impact of any strategy would be

- **What can we do that will result create that impact?** Agree what learning interventions would lead to the desired impact.

Step 9: Creating and evaluation framework with baseline measures

Measuring the impact of a learning strategy to support staff to prepare for working later in life is very challenging. The learning that people undertake now, may only be realised in many years' time, sometimes decades, depending on the age of the learner. However, you need to know if your learning strategy is working and that you are making a difference to the working lives of staff.

It is helpful if you can think of short, medium and long term measures. The nature of the learning around working later may mean that the long term measures can be quantitative, but that the short term measures might be more qualitative and about the learners experience and any shifts in their hopes, fears and expectations.

A good example would be around financial planning for retirement:

Short term measure
The 'distance travelled' in learning terms. What was the learner's awareness, anxiety levels and understanding around pensions prior to, and directly after the learning? (Pre-course evaluation questions.)

Medium term measure
Affecting change. Did the learner make any changes/improvement to their financial planning for retirement as a result of undertaking the learning? (Evaluation after a set period of time, for example, one year.)

Long term measure
Impact. Was the learner financially prepared and able to retire when they had planned and were/ are financially secure in retirement? (Evaluation at retirement age.)

A good evaluation framework helps you to review, refine and adapt your learning strategy. It helps you to demonstrate the value of your interventions and will keep the organisation, and staff, from falling into the 'blind spot' or 'tomorrow' zone as you will be continually be receiving feedback.

A final word on measures
A learning strategy to support staff to prepare for working later in life is a long term activity and so your data and baseline measures should be continually reviewed and refreshed. In a short space of time, service provision and staff demographics can shift dramatically. The strategy itself may impact on your staff demographics and so a review, ideally annually, should be part of your framework.

Developing a learning strategy

What is the **purpose** of our learning strategy?	What **impact** do we wish to see? (Short, medium, long term)	How will we know we have achieved this? What **measures** can we take?

Step 10: Delivering and evaluating learning
Depending on your learning needs analysis, you will need to develop and deliver learning that meets those expectations. The good news is that a lot of research has already pointed to four learning themes and we have gathered some useful organisations and resources that you may find helpful to get you started which you will find at the end of this publication.

You should work in partnership to deliver the learning. The support of unions and Union Learning Reps can dramatically improve the

uptake of learning in an organisation. As part of designing your strategy, you will have developed your impact measures which will be vital for keeping your learning fit for purpose. Be sure to ask everyone for feedback on the learning.

As an organisation, demonstrate that you are proud and support your learning strategy and its impact. Use any positive evaluations to promote your offer and encourage senior staff to recognise the effort and energy of staff and unions in taking positive steps to build better futures.

The four key learning themes

Planning long and rewarding careers

Individual – Mid-life development reviews to discover and meet your goals for working later in life

Organisation – Creating pathways and learning opportunities that enable staff to continue to grow professionally later in life

Keeping healthy

Individual – looking after yourself. Identifying and addressing your health and wellbeing needs

Organisation – Creating a healthy workplace, supporting staff to keep healthy and supporting older workers in the workplace

Getting ready for retirement

Individual – Preparing yourself financially, psychologically and practically for retirement

Organisation – Supporting those approaching retirement, capturing knowledge and expertise, succession planning

Working flexibly

Individual – Understanding, planning and preparing to work flexibly later in life

Organisation – Creating a culture that enables flexible working and preparing managers to manage a flexible workforce

Developing and delivering a learning strategy to support staff to prepare for working later in life

Valuing older workers, a 10 step action plan

Understanding, challenging and changing perceptions	
Step 1	Create a space for a discussion
Step 2	Do a temperature check in your organisation
Making a commitment and raising awareness	
Step 3	Make a commitment to creating a positive learning culture through a 'Charter for Older Workers' or learning agreement
Step 4	Celebrate your commitment and start to raise awareness
Understanding the needs of the workforce and having meaningful conversations	
Step 5	Capture data to help you understand the learning needs
Step 6	Have meaningful conversations with staff to check out their lived reality against what your data tells you
Step 7	Analyse the data to establish your learning needs and priority areas
Developing and delivering a learning strategy	
Step 8	Agree the purpose, impact and learning interventions that will make up your learning strategy
Step 9	Create and evaluation framework with baseline measures
Step 10	Deliver and evaluate the learning and celebrate your successes

A template for a 'Charter for Older Workers'

The Charter for Older Workers sets out a vision for an aging workforce and aims to be a catalyst for individuals and organisations to examine, review and improve their provisions and support for older workers in their workplace.

The charter may also serve as a guide and framework for all those involved in learning and development, workforce planning, staff support, and any organisational strategies with older workers in mind.

Please note: This charter does not in any way impact on, or replace, nationally or locally negotiated union agreements or frameworks.

The value of older workers

There is currently a demographic change taking place which will result in an increase of older people throughout society. This is reflected within the workplace where this specific group of workers is growing. As the older workforce grows, it is expected that there will be a decrease in those aged 16-49 years old coming into the workplace in the next 10 years. This means older workers will be the main untapped source of labour increase and will play a vital role in the workforce. Reflecting the community profile they serve, older workers bring experience, knowledge and skills that we cannot afford to lose in the workplace.

It is well documented that the recovery time for older workers is longer from the impact of long shifts, night work, and high physically, psychologically and emotionally demanding roles. However older workers can often do the same work as that of their younger peers and research [1] shows that any diminution of energy levels is offset by experience and expertise.

Requests to work flexibly, part time and in job share is high among the older workforce. This flexibility may be necessary to allow them to work to the top of their ability given longer recovery period and other issues such as caring responsibilities.

The needs of older workers

The need for workers to remain in the work place for more years than previously planned will be a growing theme. The State Pension Age has risen from 60 for women and 65 for men, to 66 or 67 (depending on current age) and this is expected to rise again in the future. We will see a group of workers in the workplace who may find their current roles will not be a 'good fit' as they enter their mid to late 60s.

Further, the rising costs of living and a general wage freeze means many workers face gaps in their pension contributions. This is compounded for some by having taken time out from the labour market to have children and provide family support. The results are that we have an increase of workers who may not be in a financial position to stop work and retire.

Of course, we have a growing band of older workers that chose not to retire. Their job offers them a focus, additional earnings and supports their wellbeing into even older age. It's important to celebrate the motivation and commitment of older workers – many of whom are now fitter and healthier than their counterparts would have been some years ago – people want to keep working as well as having to.

In order for older workers to remain and feel supported in the workplace there needs to be:

- A cultural acceptance of the vital role older workers play in the workforce and productivity.

- A celebration of the older worker at both an organisational and individual worker level across all age groups.

- A learning strategy to meet the learning and development needs and aspirations of older workers. The strategies should provide early interventions such as midlife development reviews for career planning, retraining, redeployment and up-skilling for different job roles. Further, the learning strategy needs to include an awareness-raising package designed specifically for the older worker on stress and wellbeing, financial and pension planning, as well as developing the skills and knowledge of managers in their role in supporting an older workforce.

Charter for Older Workers 2015 developed by Royal College of Nursing. Available for general use, please contact RCN

- An active, flexible working offer that recognises the needs of older workers who may need to work fewer hours, part time or fewer shift patterns whilst meeting the business needs of the organisation.

- An implementation of all of the recommendations of the independent NHS Health and Wellbeing Review and other evidence-based workplace guidance (i.e. NICE) *3. However we need to ensure that age and a longer working life does not adversely impact on an employee's health or their ability to work effectively and safely and to develop a risk assessment framework which can assist organisations to look at the cumulative impact of working longer.

Partnership work between the employer and the trades unions

Trades unions have a constructive role in the development and delivery of the older worker agenda.

The Union Learning Representative can provide a unique role in supporting the delivery of midlife development reviews and can work in partnership with the employer on an older worker working group/forum.

Union Health and Safety Representatives can work in partnership with organisations to support a healthy workplace that meets the needs of older workers. We are increasingly aware that health, safety and wellbeing is more than just the absence of work-related disease or injury. There is now an emphasis on achieving physical, mental and social contentment amongst staff which may well support workers to continue to work later in life. *2

The Equality Agenda and Older workers

Inclusive support needs to be open and accessible to all those who need it. It takes positive action to redress barriers for older workers so they can fully participate in the workplace.

Some groups of older workers may well face exclusion from mainstream support. Examples include:

- Workers on lower pay/bands' working part-time or on temporary contracts.

- Women workers in general, but specifically those currently in the 50 to 56 age bracket (because of the recent changes to the State Pension Age) and those who have been away from the labour market due to having children.

- Workers from overseas who may have entered the pension and national insurance scheme later in life.

- Workers who struggle with Maths and English and ICT skills due to the level of literacy and financial resilience required for pensions awareness and career planning, much of which is on line and requires good IT skills.

- Workers who are carers for children (including grandchildren) and other members of the family and adults who have to work longer due to financial burdens.

Who are the key stake holders in this Charter?

The key stakeholders are; the employer, the trades unions, all of the workforce, specifically older workers and their families. The consultation, and involvement of all of these key stake holders is essential to successfully achieve this charter.

Managing risk

This charter sets out to signify the start of a process within an organisation which:

- recognises the aspirations of both the employer and the trades unions for good employment policy and practice across the life course - protecting today the older workers of the future.

- recognises the desire to arrest any practice that results in capability, early exit or disciplinary process which can result in high numbers of older/aging workers losing their jobs.

Charter for Older Workers 2015 developed by Royal College of Nursing. Available for general use, please contact RCN

- endorses early intervention, support and guidance for the older/aging worker so they can make informed decisions in their longer working life.

Recruitment of older workers

Being over the age of 50 can prove a barrier to securing a job and unemployment levels in this age group are rising. Where organisations and companies have run specific, targeted recruitment using images of older workers and gaining a reputation for employing older workers they have successfully attracted these workers and benefited from their experience, skills, customer/patient service, resilience and high levels of productivity.

References

NHS Employers Working Long Group Recommendations
http://www.nhsemployers.org/your-workforce/need-to-know/working-longer-group

[1] **NHS Employers Working Long Group- audit of literature**
http://www.nhsemployers.org/your-workforce/need-to-know/working-longer-group/preliminary-findings-and-recommendations-report-for-the-health-departments

[2] **Health, Work and Wellbeing, NHS Health at Work**
www.nhshealthatwork.co.uk/health-work-wellbeing.asp

[3] **RCN Healthy Workplace, Healthy You - Supporting employers and RCN representatives to improve working environments and the wellbeing of nursing staff**
http://www.rcn.org.uk/newsevents/campaigns/healthy-workplace

DWP Older Workers Employers Toolkit
http://ageactionalliance.org/employer- toolkit

This charter is signed by the following key stakeholders as a commitment to raising the profile, support and recognition of the value of older workers; celebrating their contribution within the workplace

Organisation name

....

....

Employer side

Name ....

Signature ....

Role ....

Date ....

Trades Unions
(on behalf of the recognised trade unions within the above organisation)

Name ....

Signature ....

Role ....

Date ....

Royal College of Nursing

Research

Economist Intelligence Unit, 2014 - *Is 75 the new 65? Rising to the challenge of an ageing workforce,* www.ieu.com

Altman, 2015, *A new vision for older workers, A report to government by Dr Ros, Altman CBE* https://www.gov.uk/government/publications/a-new-vision-for-older-workers-retain-retrain-recruit

NHS Working Longer Group, 2013 - *Extending Working Life Audit of research relating to impacts on NHS Employees* www.nhsemployers.org/wlr

Money Advice Service, 2013 - *The Financial Capability of the UK. This report has now been superseded by the 2015 financial capability survey which still finds that over 12 million people have not planned for their retirement see* www.fincap.org.uk

The Pensions Policy Institute, 2003 *The Under-Pensioned* www.pensionspolicyinstitute.org.uk

Department of Works and Pensions, 2013 - *Fuller Working Lives: a framework for action*

www.gov.uk/government/publications/fuller-working-lives-a-framework-for-action

NHS Working Longer Group, 2013 - *Extending Working Life Audit of research relating to impacts on NHS Employees* www.nhsemployers.org/wlr

unionlearn, 2014 - *Midlife career reviews - Helping older workers plan their future - Evaluation report* www.unionlearn.org.uk

Useful resources and organisations

Department for Works and Pensions (DWP) *Age Positive toolkit for employers* https://www.gov.uk/government/collections/age-positive

Age Action Alliance *Employer Toolkit* www.ageactionalliance.org/employer-toolkit/

NHS Learning for Life toolkit http://www.socialpartnershipforum.org/priority-areas/learning-for-life/

Learning at work week / Campaign for Learning http://www.campaign-for-learning.org.uk/cfl/learningatworkweek/

Adult learners week and festival of learning https://www.alw.org.uk/resources

Midlife Development Reviews Activity

Information, support and resources available from Unionlearn at https://www.unionlearn.org.uk/supporting-midlife-development

Midlife Development Reviews Activity

https://www.gov.uk/state-pension-statement

https://www.moneyadviceservice.org.uk/en/pensions-and-retirement

http://www.moneysavingexpert.com/savings/discount-pensions#whatis

http://www.pensionsadvisoryservice.org.uk/

NHS Pension Scheme 2015 - http://www.nhsbsa.nhs.uk/4017.aspx

Open University Free On-line Course - https://www.futurelearn.com/courses/managing-my-investments

Brushing up maths skills

National Numeracy Challenge – www.nnchallenge.org.uk/rcn1

Learn My Way http://www.learnmyway.com/get-ready/improve-your-maths

Health and Wellbeing

The RCN Healthy Workplace, Healthy You resources supports employers and RCN representatives to improve working environments and the wellbeing of nursing staff and can be found at www.rcn.org.uk

Community Health & Learning Foundation

http://www.chlfoundation.org.uk/resources.htm

Creativity and wellbeing

http://www.start2.co.uk/about-start2

Stress / Mindfulness

https://www.headspace.com/

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www.facebook.com/royalcollegeofnursing

www.youtube.com/rcnonline

www.twitter.com/thercn