

Teachers working longer review

**Terms of reference for the Steering
Group**

October 2014

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Overview

Context

Following discussions in the programme of talks between the Department for Education and teacher trade unions on policy implementation, which commenced in March 2014, the Secretary of State for Education has commissioned a review into the health and deployment implications of teachers working longer as a result of the increase in normal pension age in the teachers' pension scheme.

Aims

The aims of the review are:

- i. to explore the health and deployment implications of teachers working longer; to consider possible options to mitigate these implications where necessary; and to make recommendations to the Secretary of State; and
- ii. to provide evidence that can be used by stakeholders to contribute to any Government reviews of the state pension age (SPA) and the link between normal pension age and SPA in public sector schemes.

Scope

The review will cover all teachers who are eligible to be members of the Teachers' Pension Scheme and who are employed in state-funded and independent schools, and sixth form colleges. Members of the TPS working in Further or Higher Education are out of scope.

Structure and Membership

Structure

This will be a tripartite review, involving teacher trade unions, employers and the Department for Education. Representatives of the above organisations will form a review group which will meet regularly to coordinate the review.

There will be two sub-groups of the review, which will each consider:

1. The evidence about the impact of working longer, and how any issues/barriers identified could be addressed.
2. The employment practices which could support teachers working longer.

In considering those issues and possible recommendations the review will take into account the public sector Equality Duty which requires that public bodies:

- have due regard to the need to eliminate discrimination;
- advance equality of opportunity; and
- foster good relations between different people when carrying out their activities.

Composition

The following organisations will be represented on the review group:

- The Department for Education
- The Welsh Government
- Teacher trade unions:
 - ASCL
 - ATL
 - NAHT
 - NASUWT
 - NUT
 - UCAC
 - Voice
- Employer representatives:
 - The Local Government Association (LGA)
 - The Welsh Local Government Association (WLGA)
 - The National Governors' Association (NGA)
 - Governors Wales
 - The Freedom and Autonomy for Schools National Association (FASNA)
 - United Learning
 - The Independent Schools Council (ISC)
 - Sixth Form Colleges Association (SFCA)

Governance

The review will be carried out in partnership with secretariat support provided by the Department for Education, including chairing meetings, commissioning data/research and drafting reports. The employer and union representatives on the review group will agree and make recommendations to the Secretary of State for Education in England. The Welsh Government will consider the recommendations in relation to teachers in Wales.

Any costs will be met by, and must be approved in advance by, the Department for Education.

Evidence gathering process

The availability of evidence will be a major challenge for the review to overcome and as such the first priority of the review will be to agree the evidence gathering process. As a preliminary step, before this process is agreed, the DfE will assess all of the relevant data and evidence available in this area, including the findings of the NHS Working Longer Review and anything provided by unions and employers. It is likely that the review group will need to commission external research organisations to support the review. Any data provided to the review will be available for use by any member of the review, unless agreed in advance by the review group.

Suggested initial work programme

The subgroup exploring the evidence of the impact of working longer will focus on the following (with the aim of reporting back to the main review group who will then discuss possible recommendations):

- the physical, mental and emotional demands of each role within the teaching profession, and an assessment of the impact of the ageing process on each of these roles, including how any particular issues caused by the ageing process could be addressed;
- the medical conditions which underpin applications for ill-health pensions, and how these could be addressed;
- the provision, availability and quality of occupational health support and other support and health services (e.g. to assist those with loss of mobility) and how suitable it is for providing appropriate support for teachers who are working longer; and
- the current teachers' ill-health pensions provision; how suitable it is for teachers who are working longer and how well the provisions are understood by members and employers.

The subgroup exploring employment practice will focus on the following (with the aim of reporting back to the main review group who will then discuss possible recommendations):

- the various career pathways which could support teachers working longer, and the extent to which teachers are prepared throughout their careers for moving on to alternative pathways;
- what good employment practices look like which would support teachers to work longer, and how these practices could be developed, promoted and shared;
- the extent to which and the reasons why older teachers drop out of the labour market, including the employment experience of older teachers;

- the extent to which TPS flexibilities (e.g. phased retirement) are understood and utilised by employers and teachers to support working longer, and any barriers to their usage – reflecting that teachers and employers will have to understand the different provisions of the separate sections of the TPS; and
- the extent of current flexible working within the teaching profession (e.g. managed re-deployments between schools, part-time working), the potential options for further flexible working, and how existing and new practice could be used to support teachers working longer.

The preliminary findings of each sub-group and possible recommendations would then be considered by the review group.

Timescales

The review will aim to reach recommendations within two years. An interim report will be published with preliminary findings after one year. Further milestones are to be agreed by the review group.

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