

Teachers Working Longer Review – Meeting of the Amalgamated Steering and Sub-groups on 15 December 2015

Minutes

Attendees

DfE – Jeff Rogerson (Chair), Michelle Thompson-Smith, Daniel Metcalfe and Helen Wood.

Group members – Valentine Mulholland (NAHT), Dave Wilkinson (NASUWT), Anita Jermyn (LGA), Donna Saby (GDST), Graham Baird (SFCA), Suzanne Beckley (ATL), Deborah Simpson (Voice), Tricia Howarth (United Learning), David Binnie (ASCL), Pat Moran (Welsh Government), Jackie Wood (LGA), Nick Kirby (NUT) and Sandra Bennett (NUT).

Apologies

Stephen Baker (DfE), Adrian Prandle (ATL), Joan Binder (FASNA), Jonathan Lloyd (WLGA), Dilwyn Roberts-Young (UCAC) and Gillian Allcroft (NGA).

Notes from meeting		Action By	Action Deadline
1. Welcome and introductions			
Jeff Rogerson (JR) welcomed the group. JR advised that the main purpose of the meeting was to finalise conclusions and proposed actions for inclusion in the interim report.	Information		
2. Minutes of the Amalgamated Sub Group meeting of 20 October and update on action points			
JR reminded members that the main focus of this meeting had been a presentation by IES on the draft REA final report. The group agreed the minutes as a true record and JR advised that DfE would publish the minutes on the group's page on gov.uk. JR gave an update on the actions from the previous meeting: <ul style="list-style-type: none"> DfE researched the provision within the Republic of Ireland Teachers' scheme which allows teachers to retire early on unreduced pension in some cases. Members of the scheme whose employment commenced before 1 April 2004 are able to claim an unreduced pension at 55 years of age provided that they have at least 35 years pensionable service in the scheme. This provision is not available to any member who joined the scheme/started employment on or after 1 April 2004; DfE conducted further analysis on the evidence gathered including identifying 	Information Action Information	DfE	24 December

<p>which related to all workers and which to older workers only. DfE circulated a spreadsheet, containing this information and details of other ongoing projects within DfE, to group members in November;</p> <ul style="list-style-type: none"> • DfE published the minutes of both of the 15 September sub-group meetings on gov.uk; • DfE received a copy of ICF’s study on older workers in Denmark and issued copies to group members at the Steering Group meeting on 17 November; • DfE circulated all evidence submitted by group members through the call for evidence; and • DfE made arrangements for the next meeting of the Amalgamated Sub-Group and circulated proposed dates for sub-group meetings in December and January. 			
<p>3. Minutes of the Steering Group meeting of 1 December and update on action points</p>			
<p>The group agreed the minutes as a true record and JR advised that DfE would publish the minutes on the group’s page on gov.uk.</p> <p>Michelle Thompson-Smith (MTS) gave an update on the actions from the previous meeting:</p> <ul style="list-style-type: none"> • DfE amended the minutes of the 17 November meeting as requested by the group and circulated a revised version. The group agreed the last version circulated as a true record and MTS advised that the DfE would arrange for these to be published on the group’s page on Gov.uk; • DfE are continuing to work with Gov.uk colleagues to arrange publication of the TORs and PID and are hopeful that a way forward will be agreed before the next meeting; • Responses are still awaited from ACAS and CIPD. DfE will continue to follow up on these; • The summary of findings document, which was circulated with the papers for this meeting, was revised to reflect the discussions at the meeting of 1 December; • DfE have considered what has been suggested to date on future research 	<p>Action</p> <p>Information</p> <p>Action</p> <p>Action</p> <p>Action</p> <p>Information</p>	<p>DfE</p> <p>DfE</p> <p>DfE</p> <p>DfE</p>	<p>24 December</p> <p>18 December</p> <p>Next meeting</p> <p>Next meeting</p>

<p>and this will be discussed further in agenda item 5;</p> <ul style="list-style-type: none"> • DfE have added a date to the interim report template; • Group members did not have any further comments on the skeleton structure of the report; • DfE have prepared a first draft Interim Report using the summary of discussions from the last two steering group meetings as a starting point and this will be distributed and discussed under agenda item 4; • DfE have circulated a revised timeline and this will be further discussed under agenda item 6; and • DfE circulated the proposal that the planned Amalgamated Sub-group meeting on 15 December could be a combined Steering/Sub-group meeting and received no objection. 			
<p>4. Discussion on conclusions/recommendations for the interim report</p>			
<p>JR advised that purpose of the session was to continue the discussions from the steering group meeting on 1 December on the content of the draft interim report and further possible conclusions/recommendations.</p> <p>JR suggested the group split into three smaller groups to do this, ideally mixed groups of employers and union representatives, and then come back together as a whole group after 45 minutes to pull together consolidated views/comments.</p> <p>To aid discussions, DfE had revised the document summarising conclusions/possible actions from previous discussions and used it as a basis to produce an initial draft of the Interim Report. DfE shared hard copies of the draft Interim Report.</p> <p>A summary of the group's discussions is as follows:</p> <ul style="list-style-type: none"> • The statement that ill-health retirement has diminished in recent years is not consistent with more recent statistics, which show a flat rate; • The report should make clear that it refers to acceptances not applications when stating that two thirds of teachers over 50 who apply for ill-health retirement do so on the basis of total 	<p>Information</p>		

<p>incapacity;</p> <ul style="list-style-type: none"> • The report could focus more on perception, understanding and use of occupational health (OH) and that all parties need to be more supportive to the process; • It is considered that OH is not as widely and freely available as it should be and that teachers should be able to self-refer; • The quality of OH provision should be considered, particularly receiving clear indications/views following referral and a sector wide set of standards could be considered; • References to NHS OH provision should be moved to future research/potential case studies; • There could be more focus on overall wellbeing. This could include suggestions such as employee engagement surveys and mental health champions for staff; • The report should make clear what key work skills it refers to when stating that these do not deteriorate significantly before age 70 and whether this is just teachers or the population as a whole; • Reference could also be made to older teachers motivation and the importance of autonomy; • The impact of supportive leadership practices to support working longer has possibly been underplayed in the report. Case studies could be used to address this; • The statement that the education sector has more positive age management practices should be removed as the evidence is tenuous and dated; • The statement that part-time working is not routinely offered as an alternative to ill-health retirement should be amended to read “not routinely offered as part of managing ill-health”; • The statement that evidence suggests a low take up of phased retirement could be amended as this is the confirmed position; • More should be included on teachers’ thoughts and aspirations including financial impact; • The title ‘Longitudinal Research’ could 			
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<p>be changed to ‘Longer Term Research’;</p> <ul style="list-style-type: none"> • Exit interviews could generate valuable evidence but consideration needs to be given to confidentiality clauses; • The research section should be changed to focus on the evidence gaps and not the research methods; • The title ‘Initial Conclusions and Recommendations’ should be changed to remove recommendations and the introduction to this section redrafted to provide more explanation on its purpose; • An extra conclusion could be added on the importance of whole career management and teachers’ health and welfare in general. There should be further promotion of the benefits of this; • The statement that the value of older teachers should be reinforced and should refer to the value of experience in particular; • Two-tier could be removed from the conclusion on ill-health pension arrangements; • In regards of additional career pathways, it may be worth looking at where examples exist and possible limitations/barriers; • Where the report refers to employers, it needs to be more specific. i.e. school leadership; and • The conclusions could be redrafted to make them less general as there is a risk this could diminish the credibility of the Review. 			
5. Next steps			
<p>JR advised that DfE will revise the draft Interim Report following today’s discussions and recirculate it to the group ahead of the meeting on 5 January.</p>	Action	DfE	22 December
<p>The group decided that 5 January was too early to sign off the report as they will not have a chance to review amendments in advance. Therefore, it was suggested that both meetings planned for January (5 and 19) should be amalgamated steering and sub-group meetings with a view to holding further discussions at the first meeting and signing off the interim report at the second. DfE will circulate this proposal to group members.</p>	Action	DfE	18 December
<p>Helen Wood (HW) advised on what is</p>	Information		

possible, within timescales, with regards to further research. She will look further at the potential costs and resources available, taking into account that any fieldwork would probably need to be carried out in March/April. She will pull together a proposal for discussion at the next meeting.	Action	DfE	5 January
6. Timeline			
The discussion in item 5 confirmed the timeline would need further amendments and so this item was not discussed further here.	Information		
7. AOB			
None	Information		
8. Review of meeting including any action points			
JR summarised discussions, including action points, and thanked everyone for attending.	Information		
9. Next meeting - 5 January between 11am and 1:30pm – Sanctuary Buildings			
JR advised that the next steering group meeting is due to take place on 1 December between 11am and 1:30pm.	Information		