

Teachers Working Longer Review: final report

**Annex E: Working in the teaching
profession beyond normal pension age**

Produced by CooperGibson Research

Acknowledgements

This research was commissioned by the Department for Education. We acknowledge the helpful advice and appraisal of the Teachers Working Longer Review group.

The authors would also like to thank the many teachers and school or college leaders who gave their time to participate in this research. We appreciate the openness and honesty of all contributors in sharing their experiences.

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1. Executive Summary

CooperGibson Research was commissioned by the Department for Education to carry out in-depth qualitative research with a small sample of schools and colleges to ascertain the benefits, challenges and strategic considerations involved when teachers work beyond normal pension age (NPA).

The outcomes from this research will inform the broader work of the Teachers Working Longer Review Group.

1.1 The research

Twenty focus groups were conducted across 10 schools and colleges – involving a total of 62 teachers, plus an additional 19 qualitative telephone or face-to-face interviews with headteachers, governors or other members of the senior leadership teams. The fieldwork was carried out across all regions of England and with a range of institution types including academies and independent schools. With all participants, the fieldwork explored their perceived benefits and challenges to working beyond NPA; the strategic processes that schools implement to manage retirement/phased retirement; and examples of good practice in supporting teachers to work beyond NPA.

1.2 Summary of findings

The following findings are based on focus groups and interviews conducted in 10 institutions. Caution is therefore advised in interpreting the findings due to the qualitative nature of the work and the small sample of institutions involved. The findings however, do provide an informative snapshot of the issues highlighted by teachers and schools when considering the implications, challenges and processes involved both in working beyond NPA and supporting staff members to do so.

Motivations and barriers

There were three key motivations reported by teachers (and headteachers) for members of staff working beyond NPA:

- 1.** Financial (needing to maintain an income)
- 2.** Professional (enjoyment of the role)
- 3.** Personal (fulfilment/maintain active lifestyle).

Furthermore, research participants emphasised the importance of a respectful and supportive working environment in deciding to remain in a role beyond NPA – including among pupils as well as other colleagues.

Where there were perceived barriers to working beyond NPA, these were most commonly reported as reduced energy levels/increased physical limitations and the challenges these subsequently created for keeping up with workload demands and the pressure of scrutiny and accountability. In two schools, it was clear that members of the senior leadership team were an influential factor: if the headteacher was likely to retire in upcoming years, this was directly contributing to the decision of other teachers not to work beyond NPA – they did not envisage working for a new headteacher who might not ‘embrace’ the same levels of flexibility.

Many of the challenges of the role that teachers cited were not specific to aging *per se* (e.g. increased workload), however it was felt that the aging process meant that it was not always easy to keep up with changes in a fast-paced curriculum.

Supporting those working beyond NPA

Occupational health support was available across schools and colleges – but in general, teachers dealing with health issues that were specifically related to aging (e.g. degeneration of joints) appeared to manage these conditions without seeking specific support from schools. Some suggested that improvements could be made to relieve the physical demands of the role, and others provided examples of how this was achieved (e.g. assistance with carrying heavy loads).

Logistical support for teachers who wished to work beyond NPA most commonly came in the form of reducing working hours and/or changing the nature of their role (e.g. to support roles¹ or from senior leader to teacher). It was not clear during the focus groups that all members of staff were fully aware of the range of options that may have been open to them.

When considering phased retirement, headteachers noted that it was important to consider the implications for the school in terms of timetabling and the practicalities of job-sharing in teaching subjects where sequential learning was necessary. The most common perceived benefits of a phased approach to retirement however, were widely reported across institutions as the ability to ensure that older teachers mentor younger members of staff – passing on highly developed skills and expertise prior to full retirement, along with the stability and consistency that older teachers offer to the wider school community, including pupils and their parents who build up trusting relationships with experienced long-term members of staff.

¹ Examples were observed where schools had retained the expertise of teachers by providing non-teaching support roles to move into (sometimes combined with reducing working hours). These ranged from learning support or specialist staff, e.g. leading a phonics programme, to pupil support e.g. pastoral roles, to more general or ancillary roles, e.g. librarian.

Succession planning and strategic thinking

Very few schools/colleges appeared to implement formal strategies for discussing retirement options with teachers; there was some indication that more training for headteachers would be beneficial in areas of strategic planning for staff retirement, and the sorts of information and guidance that could be offered to members of staff either internally or through courses delivered by external providers.

Where strategic planning was in place, it was focused on short- to medium-term needs (such as reacting to a specific member of staff coming up to NPA) rather than a longer-term approach for managing staff working beyond NPA, which may become increasingly necessary as the impact of pension changes are more readily felt by the school workforce. All participants acknowledged that it was important to consider individual and institutional needs when planning retirement or working beyond NPA.

In cases where retirement planning information was made available to teaching staff (e.g. internal training/information sessions), participants appeared to value these. However, such sessions did not always seem to be promoted widely and may require clearer signposting in future. Furthermore, some teaching staff felt that it was difficult to understand the information provided and that more opportunities to tailor information to their own circumstances would be appreciated.

Younger members of staff felt that they did not always think about pensions/retirement planning soon enough and that information delivered at earlier stages in their career (i.e. before age 50) would be useful.

Headteachers voiced concerns that they felt unclear as to the legal implications for what they could/could not say to members of staff and that – to mitigate any risk of appearing discriminatory – decisions to enable teachers to work longer were closely linked to assessments that they needed to make for all staff in terms of competence and capability. However, this was countered with suggestions from a small number of older teachers that they were made to feel ‘expensive’ by senior leadership teams (a suggestion echoed during interviews with senior leaders, many of which highlighted the additional costs of employing members of staff with many years’ service and at the top level of pay scales). The challenges that this created in a time of budgetary constraints was clear, although the expertise, continuity and stability offered by older members of staff was highly valued by the senior leaders interviewed – to the extent that many of the schools and colleges participating in the fieldwork had found ways to retain these staff (e.g. through moving these staff into part-time specialist roles). Going forward, due to the budgetary and logistical difficulties, some headteachers questioned the sustainability of their current approach to retaining staff should more staff approach them to take phased retirement or change their role.

2. Introduction

Following recommendations by the Independent Public Service Pension Commission to reform public service pensions, the Department for Education published a Proposed Final Agreement (PFA) which set out the design for a reformed Teachers' Pension Scheme (TPS). This included a pension based on career average earnings; an accrual (build up) rate of 1/57th; and a Normal Pension Age (NPA) equal to State Pension Age (SPA), but with options to enable scheme members to retire earlier or later than their NPA.

After detailed discussions and consultations with key stakeholders the Department finalised the regulations – The Teachers' Pension Scheme Regulations 2014 – covering the main provisions of the reformed TPS. These were laid before Parliament in March 2014 and provide the framework for the career average arrangements in the TPS as well as for the transition to those arrangements.

In line with a number of key concerns highlighted at the time, in October 2014, a review began into the health and deployment implications of teachers working beyond NPA as a result of the normal pension age increase. This tripartite review involving the Department for Education, unions and employers aims to:

- Explore the health and deployment implications of teachers working beyond NPA:
 - consider possible options to mitigate these implications where necessary
 - make recommendations to the Secretary of State
- 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.

2.1 Research remit

The Teachers Working Longer Review Group initially explored available evidence regarding working longer, through Rapid Evidence Reviews and Calls for Evidence. However, following the Review's Interim Report several key questions and evidence gaps remained which were prioritised.

CooperGibson Research was commissioned to provide relevant evidence to inform the work of the Review Group. This research focused on:

- Motivations to remain in teaching beyond NPA
- Enablers and barriers
- Benefits for all those involved

- Strategic and management approaches to working beyond NPA
- Support for those considering/working beyond NPA
- Examples of good practice.

The approach taken is outlined in the methodology section below.

2.2 Methodology

Qualitative fieldwork was undertaken across a range of schools and colleges in England, through a mixed method approach of focus groups, telephone and face-to-face interviewing. This maintained the flexibility required to ensure that a range of views were captured through the fieldwork, including teachers nearing, or already working beyond NPA, headteachers, governors, human resources (HR) personnel and other members of senior leadership teams.

Focus groups were carried out per institution (one or two groups per institution, depending on availability). During the visits, face-to-face interviews were also carried out with the headteacher or another member of the senior leadership team such as deputy/vice principal. In addition, follow-up telephone interviews were undertaken with relevant school personnel such as governors, HR\ staff or teachers working beyond NPA in specialist support/management roles (e.g. timetabling).

2.2.1 Sample

For a full sample breakdown, see Table 1.

Institutions

In total, 10 schools and colleges participated in the fieldwork:

- 4 primary schools (2 maintained, 2 academies)
- 4 secondary schools (2 maintained, 2 academies)
- 1 sixth form college
- 1 independent school (all through school).

These covered coastal/rural (4) and urban (6) areas across England, and represented institutions working through the full range of Ofsted performance levels from 'requiring improvement' through to 'outstanding'.

Teachers, assistant/deputy headteachers

A total of 66 teachers, assistant/deputy headteachers either nearing, or already working beyond NPA, participated in the fieldwork. Among those already working beyond NPA, this included a range of staff members who had reduced their role to part-time/flexible working prior to taking full retirement, and those who were still working full-time (including some who had moved into non-teaching support roles).

Senior leaders

An additional 15 interviews were carried out with relevant senior school personnel such as headteachers, governors and HR staff.

Table 1: Sample details

Institution type	Status	Participants
Primary	2 Academies (4-11) 2 Local Authority maintained (3-11)	22 teachers 1 cover teacher 2 assistant headteachers 2 deputy headteachers 4 headteachers (all above age 54-70) 1 Multi Academy Trust executive headteacher 1 chair of governors
Secondary	2 Academies (4-18/11-18) 2 LA maintained (11-18)	23 teachers 1 vice principal 1 'timetabler' (age 54-74) (all above age 54-74) 4 headteachers/principals 2 governor/chair of governors
Sixth Form College	(16-18)	7 teachers (age 57-64) 1 head of HR 1 principal
Independent	(4-11)	7 teachers (age 54-72) 1 headteacher
TOTAL	10 institutions	81 individuals: <ul style="list-style-type: none"> • 15 headteachers/principals/governors/HR • 66 teachers/assistant headteachers/deputies/others

Cautionary note

Due to the small sample of institutions involved in this research caution is advised in interpreting the findings. The findings presented in this report provide a snapshot of the issues involved when teachers and schools consider the implications, challenges and processes involved both in working beyond the current NPA and supporting staff members to do so.

3. Decision-Making Processes

This chapter presents findings from the fieldwork, focusing on the motivations for staff choosing to work beyond NPA, as well as the barriers that they perceived to doing so and the information required by individuals (and their institutions) to support the decision-making process involved.

3.1 Motivations

A variety of motivations for working beyond NPA were mentioned by teaching staff. These can be grouped into three key areas – financial, professional and personal motivations – and were mentioned across all focus groups.

Table 2: Key motivations for working beyond NPA (teacher focus group feedback)

Financial motivations	<p>Wanting to maintain an income</p> <p>Insufficient finances to retire (e.g. due to career breaks)</p> <p>Additional financial commitments e.g. funding children through university, mortgage responsibilities, care of elderly relative</p> <p>Changes in annuity regulations</p> <p>Retirement age affecting pension amount</p>
Professional motivations	<p>Wanting to remain engaged with professional life – having something to contribute</p> <p>Still feeling able and willing to be a part of a work community/job satisfaction</p> <p>Enjoyment of the role</p> <p>Meeting the challenge and remaining mentally stimulated</p>
Personal motivations	<p>Colleagues are social/friendship group</p> <p>Maintains self-esteem</p> <p>Personal satisfaction gained from seeing young people develop</p> <p>Stops boredom/inertia in older life</p> <p>Helps maintain an active lifestyle</p>

The motivations listed in Table 2 did not appear to differ between those already working *beyond* NPA and those *close to* NPA and undergoing the decision-making process. They were reinforced during the interviews with headteachers who offered the same reasons for teachers working beyond NPA.

'I do think that in the future financial motivations are going to be one of the key reasons why staff stay on. The other reasons are they enjoy it, and they don't want their brain to atrophy because they are at home; but it can also be sometimes that they worry about what they are retiring in to – if they live alone for instance – and this is often the case with very long serving members of staff. The school has become part of their family, an organic part of their lives and they don't want to give that up...So they try and strike a balance between being nourished by an institution and not being exhausted by teaching full-time.'
(Headteacher, independent school)

Participants highlighted the importance of the school environment itself (i.e. feeling comfortable in their place of work), the attitude of pupils towards them, and their continued enjoyment of the teaching role. Generally, the feeling was that if they did not feel respected and supported, then (if it was financially viable) they would not choose to work beyond NPA.

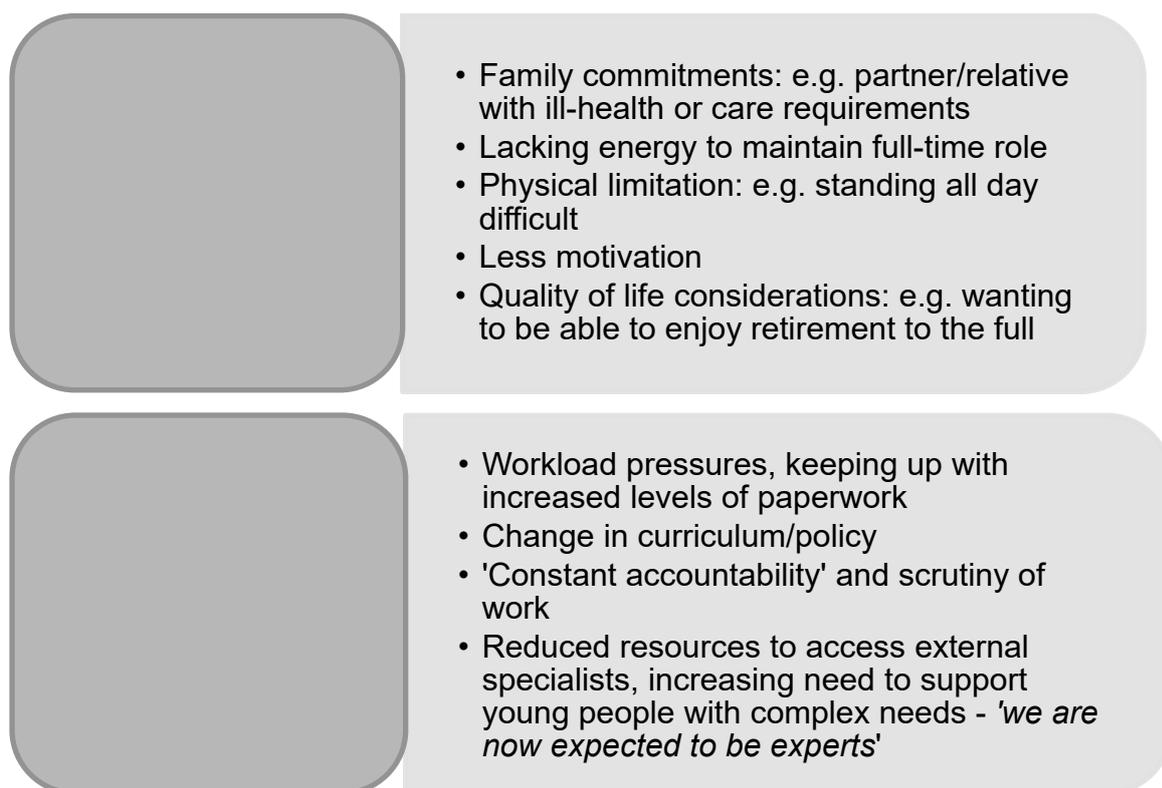
'The key factors in my decision were the relationship with my colleagues, the school atmosphere, the respect and understanding of the head, and my enjoyment of teaching...' (Teacher, 11 -18 school)

Where teachers participating in the focus groups were **not** planning to stay working beyond NPA, the members of three groups suggested that financial incentives such as bonus pay per extra year worked or paid sabbaticals, or practical changes to workload (e.g. reduced classroom time) may have incentivised them to remain in work.

3.2 Key barriers and difficulties

There were several perceived difficulties to working beyond NPA that participants identified (see Figure 1). These ranged between personal and professional considerations, although **reduced energy levels/increased physical limitations** and **workload pressures** were commonly mentioned together. Thus, from the small number of visits conducted, there are indications that a combination of factors work together to create a perceived barrier for teachers working beyond NPA (e.g. that daily workload pressures become more difficult to cope with as energy levels reduce).

Figure 1: Key considerations of working beyond NPA (teacher focus group feedback)



In addition to the reasons offered in Figure 1, one member of a focus group (primary school) said that they may have chosen to work beyond NPA but the headteacher was also planning to retire: *'a new headteacher will want to change everything and I don't want to be involved in all that'*. The stability and assurance that the headteacher brought to older workers was clearly a factor in the decision-making at this school. Other members of the focus groups were in agreement that *'if the head said she was leaving tomorrow I think a lot of us would consider going too'*. This was echoed in another primary school, where a teacher who was already working beyond NPA said that *'I often think when [the headteacher] retires, that might be the time to coincide stopping'*. They were unsure that a new leader of the school would 'embrace' the flexible approach to their working.

3.2.1 Workload pressures

A governor of an 11-18 school suggested that the pressures of teaching created a barrier for members of staff who may otherwise work longer – and this was echoed by several members of the focus groups.

It was felt by several participants (staff and senior leaders alike) that the pressure and expectation on teaching staff needed to be alleviated to entice more individuals to work beyond NPA. For example, a teacher (age 56) working in an 11-18 school

reported that, although they still enjoyed their work and managed well, by the end of the school day they were 'exhausted':

'Projecting this forward...I really don't think I could continue much after 60'. (Teacher, 11-18 school)

The current level of paperwork required by the profession was reported by teachers participating in the fieldwork as deterring them from continuing beyond NPA. Focus groups in most of the schools and the college highlighted demanding nature of the job and workload pressures, including the pace of change, as disincentives to working beyond NPA. In contrast, participants in two schools suggested that the changes in the curriculum added to the reasons why they had continued in the job. In these examples, teachers stated that the intellectual stimulation and continuing challenges of the role '*keep you thinking about things that you wouldn't do otherwise*', and this was regarded as a positive reason for working beyond NPA.

Nonetheless, workload issues – although not confined to older teachers – were a common thread running through many of the discussions that took place during the fieldwork, both in the focus groups and the individual interviews. Some schools have taken steps to ease the pressures on staff working beyond NPA, and these are presented in further detail in chapter 5.

3.2.2 Accountability

Where workload pressures were mentioned, the specific challenges raised by accountability measures were perceived to be increasingly difficult to manage with age, and despite their experience older teachers reported this as a continuing burden.

'I am constantly thinking am I not capable of doing the job, could a younger person be doing it better; because we are constantly made to challenge ourselves – to do better, to do more to improve... To live with that constantly, having to move on and constantly chasing your tail, it is exhausting'. (Teacher, primary school)

This was echoed by members of focus groups who were working in a school deemed as requiring improvement by Ofsted, where redundancies had taken place and morale appeared quite low. These teachers reported that '*the mental stress of the pressure*' was difficult for them: although not unique to older teachers, they felt this was exacerbated by the age at which they were facing additional stresses. The headteacher for this school reflected a similar sentiment during their interview, adding that increased levels of paperwork and '*relentless changes*' in the curriculum made it less attractive for members of staff to work beyond NPA.

Issues around child safeguarding and special education needs (SEN) statements and paperwork were felt by one focus group in a primary school to be a greater burden for older staff because *'you do worry about it more'* – i.e. the long-term implications of not picking up on all support requirements of each individual child – suggesting the need for additional training so that staff feel confident when working with these pupils.

Although these issues are relevant to all age ranges of the teaching workforce, discussions with focus group participants and the interviews with headteachers suggested that these were nonetheless some of the challenges that created or added to the perceived difficulties for older teachers working beyond NPA. Some of the issues highlighted through this research, therefore, are exacerbated by getting older rather than being created by or dependent on age.

3.3 Sources of information

Participants were asked to identify the key sources of information and advice/guidance that they had accessed when making their decision about whether or not to work beyond NPA. The following were mentioned in at least one focus group each:

- Union representatives
- Teachers Pensions
- Pension providers
- Government guidance on state pensions/teacher's pensions
- Independent financial adviser
- School bursar
- Local authority training course
- Other teachers who have retired
- Senior leadership teams.

Union representatives were the most commonly mentioned source of pensions/retirement information for teachers reaching NPA, referenced by nearly all groups. Members of three focus groups (11 – 18; primary; sixth form college) mentioned [Teachers' Pensions](#) and reported that this service was *'very helpful'*; one headteacher mentioned the Teachers' Pensions online service, and felt that younger generations of teachers will become used to working with that facility – *'it can be confusing for the current older generation as not everyone is that computer literate'* (Headteacher, primary school).

All headteachers identified the availability of bursars, business managers and leadership teams with whom individuals could discuss their options, as well as union staff.

'The unions do offer some pension support and most people will go to their unions and talk about that'. (Headteacher, primary school).

A small number of headteachers mentioned ensuring that meetings were arranged with union representatives or other members of the senior leadership team so that teachers were *'well informed'* when making their decisions.

3.3.1 Information courses

Although one headteacher (primary school) enabled staff to attend external courses on planning for retirement, it was more common for senior leaders to report examples of in-house meetings and workshops offered for staff (even if these were led by external agencies). For example:

- One school offered after-school staff meetings that covered pension planning and differentiated sessions by age (one meeting for under-48s and a separate meeting for those over-48)
- One school offered general information sessions delivered by the deputy headteacher, with a financial advisor made available for individual staff consultations.

Where these sessions were taking place (and staff were aware of them) focus group participants tended to appreciate them.

Useful information sessions

'Having these [general] pension meetings gives you a basis, and then you have an idea of the types of questions you need to be asking [a personal advisor/for your own situation]; it starts you thinking. Sometimes you just don't know the right questions to ask because you don't know what you are walking into'. (Teacher, primary school)

'[The meeting] made it much clearer about what my options are and the pitfalls of actually retiring earlier. They gave us a booklet with lots of information in. I would be looking at the phased retirement option'. (Teacher, primary school)

Nonetheless, some participants (nearing and beyond NPA) showed a lack of awareness about the information sessions held in their schools or run by local authorities. Teachers in a sixth form college stated that they had attended 'advisory' meetings run by Teachers' Pensions in previous years, but that this had not taken place for the last two years – a report contradicted by the two members of the leadership team that were interviewed, who said that the college provided seminars and workshops 'once or twice a term', delivered by external agencies.

These findings indicate that the **dissemination of information** about the sources of information available to teachers approaching pension age could be improved in some areas.

Where the meetings did not appear to be as widely available (or at least, publicised), members of a focus group in a primary school felt that they would appreciate one-to-one sessions as well as general group meetings. In addition, increased provision of pensions/retirement information to younger members of staff was felt to be required by those in a sixth form college: *'by the time you think about it, it is too late to get missing years in [to pension pot] to have more options for retirement'*.

3.3.2 Gaps in information

Rather than identifying gaps in the information available to them about working beyond NPA/retirement options, several participants (including teachers and headteachers) reported that existing sources lacked clarity. They found official documentation difficult to understand and *'wordy'*. This was particularly the case, they felt, in terms of applying the information it contained to specific circumstances.

'The documents available are incomprehensible for individual situations'. (Headteacher, 11-18 school).

Some participants offered suggestions where this could be improved. These particularly focused on the need for **personalisation** of information (in relation to clarity of options available, pension routes, National Insurance contributions and job options post-NPA). They suggested it was important to identify tailored information that related to their situation (rather than generic information that they were not clear was relevant to them). Teachers would also appreciate better signposting as to where they may be able to access this information for themselves (as above, many referred to unions, Teachers Pensions and gov.uk for information).

Furthermore, it was noted during the interviews with headteachers that accessing personal pension guidance and advice was not an area that they were prepared to broach with members of staff in too much detail. Most appeared to be unclear as to what they were able to say due to accountability issues and risk of perceived age discrimination. Some either spoke to HR personnel for guidance (or signposted staff to them or other senior leaders), or would make sure that staff were accessing other forms of guidance and advice.

Therefore, they tended to take quite broad and generic lines in order to mitigate these concerns. Despite this, generic information sessions were felt to have their limitations:

‘Because all [individual] situations are different, we talked about whether we should run a pension session in school and in the end we decided what we would do is send information round to encourage people to [think about] it individually...What happens is you end up running a generic session and then every person [near NPA] will come up with a question at the end about their [own circumstances].
(Headteacher, independent school)

Some teachers participating in the focus groups agreed with the headteacher feedback that because circumstances differed between individuals, it was more appropriate for them to access tailored advice for themselves, rather than with a group listening to generic information – although this needs to be balanced against those teachers who had appreciated the sessions they had attended in their schools (see 3.3.1).

3.3.3 Training and information for senior leaders

Two headteachers, cited the importance of training so that senior leadership teams are able to provide:

- Effective and adequate pastoral care as teachers get older

‘[the training] needs to be about ... understanding that older staff have got a lot to contribute and not just see people as they get older as being in the way of new innovative ideas. In fact, some of the most innovative ideas we have had here have come from older staff’
(Headteacher, primary school)

- Accurate information about where to access appropriate pensions/retirement guidance and advice

‘Supporting the transition [into retirement] - this varies from school to school, and person to person. Sometimes teachers aren’t aware of the options open to them. I know [other headteachers] who undertook mentoring as heads, retired and now work part-time for a university, mentoring students. There are a lot of things out there [post retirement-age] but we don’t know about them’. (Headteacher, primary school)

Another headteacher said that they were not sure who to contact to arrange an in-house talk for members of staff about pension/retirement options.

4. In-Role Issues

This section examines the practical and logistical considerations of working beyond NPA in schools and colleges. This includes examination of the different staffing options that meet the needs of institutions and their workforce, and the perceived benefits, challenges and support requirements for working beyond NPA.

4.1 Options for working beyond NPA

When asked about the different options that were available to them for working beyond NPA, teachers in every focus group had reduced to part-time hours as a phased retirement option. Although others were still working full-time beyond NPA, this did not appear to be the most common option.

Small numbers of participants said that they knew that phased retirement was possible because they knew colleagues who had taken the same route and they therefore had an understanding of how phased retirement worked. It was not clear during the focus groups, however, whether all members of staff were aware of the range of options that may have been open to them (or, indeed, if other options were made available to all – for example, modified full-time roles, see below).

Where full-time working was taking place, this had been altered for some individual teachers to meet their changing needs, for example:

- In a primary school, moving to teaching older year groups so that the physical demands were reduced (i.e. larger furniture, less time sitting on the carpet with very young children)
- Older staff with many years' experience moving into specialist support roles (also the case for some who reduced their working hours), taking smaller groups for sessions rather than full-class teaching (this included receiving specialist training to support children with special educational needs)
- Older staff moving into new non-teaching roles (e.g. one becoming a school librarian rather than a full-time teacher).

However, headteachers were keen to note during the interviews that such changes in working practices were made on a case-by-case basis, and it was important to ensure that the individual teacher concerned was happy to move to a new role that may reduce some responsibilities (e.g. full class/management) whilst learning new skills.

Phased retirement was a common option among the participants and it was highlighted that institutions were offering a range of practical support to assist staff through this process – particularly flexible hours and part-time working.

'We do this [adapt working routines] for maternity leave and returners, for short term illness, so [working beyond NPA] is no different'
(Headteacher, 11 – 18 school).

Considering options and working with others

'I had the opportunity of talking to a financial advisor last year – all the options were explained and [then] it was up to me to decide. I had a clear understanding of the different options. For example, I could have a change in situation if I did not want to be Head of Department anymore – I can be just a teacher instead.

I ...realised that teaching may not be [the only role available post-NPA] so I looked for other sources of income and I took up additional pension schemes to keep my options open.

One issue I had, I wanted to work roughly 0.4 or 0.5 full-time equivalent, but originally it was spread over several days. I did this for a year and it didn't work, as I ended up working full-time...Now I have two neat days. It helps if you have a good timetabler who [can] accommodate people's needs and requirements'.
(Teacher, 11- 18 school)

4.1.1 Remaining flexible

The key requirement in enabling effective phased retirement for participants was flexibility – e.g. in working patterns. It was felt that this flexibility enabled individuals working beyond NPA to create a balance between continuing work and planning for/enjoying their retirement.

Headteachers, in turn, were aware of the importance of remaining flexible in supporting older workers to continue beyond NPA.

'If circumstances arise where they need to leave, we owe it to them to allow them some flexibility, they can step down responsibilities, move sideways, go fractional, have late starts. We accommodate their needs'. (Principal, sixth form college).

This flexibility though, according to headteachers, needs to remain mutual, with some element of compromise on both sides: *'it is about dialogue...finding a middle ground'*. Consequently, imbalances such as non-attendance at meetings and ensuring that one member of staff does not always start late every day, are minimised.

However, whilst most headteachers did report being able to offer flexible working that met the needs of the school and the individual, a governor was concerned that

part-time contracts were not always straightforward to arrange due to the logistics of managing different subjects and teachers when planning a timetable:

'Part-time contracts are not possible always to get onto discrete days. One semi-retired teacher has ended up going in to school for five days a week, to get a two-day contract'. (Governor, 11 – 18 school)

This was echoed by an executive headteacher who noted that *'if we had many [members of staff] who wanted part-time, that would be a nightmare for timetabling'*.

Managing the timetable was a significant issue highlighted during the fieldwork. It was common particularly among secondary schools and where subject areas, class sets and sequential learning were important. Likewise, however, some primary schools also reported similar difficulties where they needed to consider streaming and specialist subject areas. However, many leaders and staff were open to trying to find ways around such issues, where possible, to accommodate the needs of staff and the institutions.

The following example of how the timetabling issue have been successfully managed was provided by a local authority maintained 11-18 secondary school:

Managing the timetable to accommodate flexible working patterns

Effective management of timetabling and resources was perceived by headteachers and other senior leaders as one of the key practical challenges to accommodating the needs of staff with flexible working agreements, or part-time hours.

To address these challenges, a secondary school in an urban area had contracted a retired deputy headteacher, who had been responsible for the timetable for the past two decades, to return on a part-time basis to focus specifically on continuing to design the school timetable (they also have additional tasks and now write the timetable for two other schools). The headteacher noted that the timetable was 'written around' the availability and needs of the part-time staff, which they acknowledged may not be an ideal situation for all, but it did work for this particular institution.

The 50 staff included 17 part-time workers, and the timetabler was clear that the success of the role depended on how flexible part-time staff can be 'convinced' to be: *'it will work, from both school and teacher perspective, if they can be as flexible as possible'*, but also if the staff members realise that the institution is doing what it can to meet their needs – if this was the case, the 'timetabler' thought that staff were more likely to be flexible in return.

They believed that the role requires diplomacy, negotiation and careful management, with both the institution and the part-time workers being prepared to compromise. They recommended starting the discussions 'early on' to find out 'must have' requirements for part-time staff [i.e. ideally twelve months prior to their change of working pattern]; some, for example, will have specific reasons (such as care needs) why they cannot work on certain days and these reasons need to be taken into account.

'Part of the success of the timetable is in taking care on staffing analysis – I have developed my own staffing analysis on a spreadsheet. Interestingly an ex-colleague who was a senior teacher left here to head another school – they took my spreadsheet, used my staffing analysis sheet and immediately saved staff hours. Three years ago he phoned me and I now write the timetable at his school too. With the economic pressure schools are under, more and more are looking in more detail at how they are doing it'.

Other challenges created by employing part-time teaching staff were mentioned by three headteachers and the members of one focus group. Aside from the logistical difficulties associated with part-time timetabling these were:

- The additional costs related to employing two staff for the one teaching role
- The amount of time required to catch-up with the progress made by the other member of staff sharing the role (particularly leadership roles/teaching subjects that required sequential learning)
- Difficulties in ensuring staff can attend meetings, arrange times to convene with colleagues and meet with pupils or parents.

Managing part-time contracts

We have a concept of onsite time in the contract which says how long [part-time teachers] should be onsite and how long they teach for. If you go fractional, it has to be a viable fraction of formal onsite and teaching time'. (Principal, sixth form college)

'One of the things that has worked well is I am quite flexible with some of my part-time staff, as I know one of the things people want to do when they retire is travel and you are stuck with these school holidays and that makes it much more expensive. So for people at that stage of their career we will discuss the fact that they are working the equivalent of 3 days per week so we can look at how many days that is across a year, and there are certain points in a year when you might not need your PPA [planning, preparation, assessment] staff in place so we will let people go on holiday at that point, but then when there are other times of the year when I need extra staff they will owe me those days and pay them back. For example, when we have got KS 1 [key stage 1] SATS [national curriculum tests] going on you might need extra staff in to cover and help when teachers are doing the phonics check, so those teachers that owe me days instead of me paying for supply to come in they will go and teach for me on those days; it gives you that little bit of flexibility. (Headteacher, primary school)

Overall, the main way to ensure that flexible working patterns work effectively on a continuous basis, said a headteacher in an independent school, was to maintain consistent communication between all members of staff to ensure that expectations and needs were managed on all sides.

4.2 Benefits of working beyond NPA

Teachers participating in the focus groups identified a range of benefits of working beyond NPA – not only for themselves but for their colleagues and the wider school community (Table 3). These commonly included:

- Maintaining a sense of purpose and personal fulfilment
- Sharing expertise with others
- Maintaining consistency for pupils and the school community.

Table 3: Benefits of working beyond NPA (teacher focus group feedback)

<p>Personal benefits</p>	<ul style="list-style-type: none"> • Intellectual stimulus, remaining focused • Maintaining friendships among colleagues • Thriving on seeing learners progress, engaging with young people and their energy • Offers a sense of purpose • Reduction in stress levels if move to part-time/administrative job without teaching
<p>Professional benefits</p>	<ul style="list-style-type: none"> • 'Sense of calling'/duty to school • Still enjoying the 'challenge' of teaching • Thriving on seeing learners progress • Benefits to colleagues - passing on experience, commitment to the role (it is a vocation), offering a different perspective • Continuity and stability for schools, pupils, colleagues and parents
<p>Financial benefits</p>	<ul style="list-style-type: none"> • Maintaining income • Supporting dependents (e.g. children at university) • Increasing final pension payments on retirement

The concept of offering continuity and stability not only to other colleagues but also to pupils, their parents and the wider school ethos was mentioned frequently by teachers. For younger colleagues, they saw themselves passing on experience and skills and becoming mentors.

'We are asked by troubled younger staff how to approach problems. It reduces their stress and helps them to think out solutions'. (Teacher, primary school)

'Younger staff see you as a safe pair of hands or mentor. We have seen it all, they feel reassured'. (Teacher, 11-18 school)

Headteachers echoed these findings, generally reporting that the benefits of teachers working beyond NPA are distributed among the individuals themselves, colleagues, pupils/parents and the school environment more generally (Table 4).

The wealth of experience offered, and the stability that older teachers can bring to a school environment were seen as the most advantageous reasons for teachers working beyond NPA among the headteachers interviewed.

The experience that teachers working beyond NPA can bring to an institution was thought to be particularly helpful for encouraging positive relationships with parents.

‘If we have a family that is in crisis then I know I have got several members of staff that have been here 20-30 years who will know those families really well and it isn’t as difficult to have a difficult conversation with a family if you have got a real relationship with them’
(Headteacher, primary school).

Table 4: Benefits of teachers working beyond NPA (headteacher/governor perceptions)

Individual teacher	Affirmation/ self-esteem (2 institutions) Fulfilment/enjoyment of the role (4 institutions)
Colleagues/school	Depth of experience and perspective (8 institutions) Mentoring ability for younger staff (4 institutions) Stability and consistency (3 institutions)
Pupils/parents	Stability and continuity of relationships (6 institutions) Trusted/respected individual to turn to/ask for support (4 institutions)

4.3 Challenges of working beyond NPA

In terms of the challenges identified in working beyond NPA, the following were mentioned in all focus groups:

- **Time pressures:** catching up with progress if part-time, loss of time for carrying out retirement plans or less freedom to carry out other activities outside of career/work demands
- **Physical limitations:** reduction in energy, problems such as knee/hip complaints (e.g. a full day trip out is very tiring); having to carry books and equipment between classrooms
- **Health issues:** the pressures and demands of the role creating stress in later life; stress impacting negatively on physical limitations
- **Bureaucracy:** increased paperwork and requirements in the job more generally (planning, preparation, assessment, data); changes in curriculum and policy, managing expectations and keeping up with new developments; accountability (including dealing with parents) and scrutiny.

Overall, there was a sense among all participants that the quality of life of teachers working beyond NPA was negatively impacted where individuals were doing so due to financial/personal necessity.

‘Some have to carry on because they can’t afford [retirement] – this creates resentment so the job is harder’. (Headteacher, 11-18)

‘It is one thing to work a few days when you choose to but it is very different to working full-time for 5 days when you have not chosen to – very different’. (Teacher, 11-18 school)

Whilst some females mentioned that they had taken time out of teaching to have children and so thought they were now disadvantaged because they would need to work longer, there were also examples of men (and women) who had come into teaching later in life (e.g. from other sectors) and in order to ensure that their pension was at a suitable level, they would need to work beyond NPA.

Most commonly, teachers taking part in the focus groups talked about their decreasing energy levels, reporting that they experienced tiredness more quickly as they aged. They felt that this issue was exacerbated by the workload, e.g. increased demands of paperwork and data collection, larger class sizes and having to manage the administration inevitably involved in teaching bigger classes.

‘Group size is [bigger] than it used to be – it means a lot of marking and some learners with different abilities, so it requires a lot of planning. We are getting older so you feel a bit tired anyway and the job is more demanding because there are more students to teach’. (Teacher, 11 – 18 school)

Teaching staff in one school felt that the pressures they faced were related to the changing nature of the job more generally – e.g. pressures faced by young children and their families.

‘Just coping with behaviour is hard, but constant pressure from targets alongside parents encouraged by the media to believe that if their child isn’t online to being a doctor or airline pilot, it’s the teacher’s fault... The energy required, both in the day and preparation is a lot for a 60+ year old’. (Teacher, 11 – 18 Academy)

There were also some concerns raised among teachers as to whether it was always possible to maintain high levels of engagement with the role as they aged. Members of focus groups in two schools (primary school; secondary academy) suggested that one of the key challenges was *‘maintaining enthusiasm’*. Likewise, the headteacher

of a sixth form college felt that if staff become *'too settled...this can impact on performance, [they] become complacent'*.

Headteachers were also asked about the challenges involved in employing staff beyond NPA:

Table 5: Challenges of teachers working beyond NPA (headteacher perceptions)

School leaders	Older staff members more resistant to change (3 institutions)
Individual teacher	Increased issues related to physical limitations/decreased energy (5) Mental exhaustion/reduced ability to deal with pressure (3 institutions) Keeping 'fresh'/engaged with new ideas and techniques (2 institutions)
Colleagues	Potential lack of progression opportunities for younger staff (4 institutions)
Pupils/parents	Potential for some staff to lack understanding of youth culture (2 institutions) No longer a 'role model' for younger learners – no connection (3 institutions)
School/college	Financial: older teachers viewed as 'expensive' in terms of salary, or part-time more costly (6 institutions)

Headteacher responses broadly reflected those of the members of teaching staff themselves, although the issue of cost was a particular concern for headteachers who had to negotiate resourcing cuts due to budgetary constraints.

'Most [workers beyond NPA] are on the upper pay scale and at the top of it, which makes them expensive...I have a negative budget this year and I genuinely can't see where to make the cuts any more'.

(Headteacher, 11-18 school)

Despite these concerns, the perceived benefits offered by staff working beyond NPA (see section 4.2) outweighed these challenges and where possible, headteachers were finding ways at least in the short-term to retain the experience of these teachers on their workforce (e.g. through creating new specialist roles and offering

flexible working patterns), whilst asking them to mentor younger teaching staff so that their knowledge was not lost when full retirement was taken (see section 5).

The issue of cost was reflected to some extent in the perceptions that teaching staff felt others held about their decision to remain working beyond NPA. In four institutions, some participants reported that they were made to feel '*expensive and old*' by senior leadership teams, or were concerned that – if there was a change of headteacher before they fully retired – a new headteacher would view their salaries as high compared to that of younger teachers. This, they felt, also limited their options for movement post-NPA:

'When you reach 50/55, you can't apply for other jobs outside of school, you have little chance of getting them. This is not motivating. You are too expensive compared to younger teachers, [employers] prefer young people who can bring something new to the school.'
(Teacher, 11-18 Academy)

In addition, teachers in two focus groups had the impression that they were viewed as '*bed-blocking*' (i.e. not allowing younger staff to progress).

Resistance to change among older teachers was linked to the perceived risk of staff working beyond NPA who were not remaining engaged with new ideas/techniques. These challenges were particularly felt by headteachers in areas where regular training was required – for example in ICT where there is a fast rate of development in skills and knowledge, not just for teaching the subject but for carrying out the teaching role itself.

'I have had staff who have retired who have been proud to not have used a computer and handwritten everything. This causes other drawbacks in terms of time, and in terms of sharing resources – we have got a VLE [virtual learning environment] and if [they] can't log on in spite of being shown many times, it can be frustrating.'
(Headteacher, 11-18)

This potential lack of awareness and understanding in new areas of teaching also led to concerns among some headteachers that older staff may no longer be able to connect with the young people they are teaching. Nonetheless, for most headteachers/senior leaders interviewed, despite these challenges, the consistency and stable relationships that older teachers had built up over the years with their pupils were thought to enable them to create trusting and positive relationships with young learners.

4.4 Support requirements

Members of the focus groups generally said that they had received strong support from their school leadership teams, with headteachers '*encouraging much valued staff to remain*' (Teacher, 11-18 school). For three groups this included long-term support that had been given to staff members over many years through personal/family or health issues and it was thought that this would continue as they worked beyond NPA.

An increase in the physical limitations of an aging workforce were raised by four deputy/headteachers during the interviews.

'Early Years teaching [can require extra support] as it is very physical, as you are very often down on the floor or you are bending over very small tables. I have got teachers that have got bad backs now, or knee problems and they aren't going to be able to physically cope – so it is about allowing them to move and not move them from year 3 to year 6 in one great jump, you have to plan it and do it over a number of years.'
(Headteacher, primary school)

The support requirements associated with decreasing energy levels were addressed by schools and individual teachers through:

- Reducing management responsibilities where appropriate/requested
- Changing the class year assigned to a teacher
- Not requiring attendance on full-day trips/excursions

The principal of a sixth form college perceived that staff in management roles were 'more likely' to 'step down' due to the challenges inherent with senior leadership roles – but still remain in their roles as classroom teachers.

'[This change] allows [the older worker] to stay in the college and do the job they love, work with colleagues but change their job to make it easier.' (Principal, sixth form college)

College participants noted examples of where this had happened, for example, moving from Head of Sixth Form to part-time teaching. Indeed, members of two focus groups (11-18 school; primary school) felt that as they reduced their hours or responsibilities during phased retirement, their support needs decreased correspondingly. Whilst a number of participants had chosen to reduce their responsibilities (e.g. from Head of Department to teacher, with some also taking part-time options), one senior leader, mentioned that they would prefer to fully retire because they viewed this type of change in role as a step backwards.

4.4.1 Occupational health needs

The availability of formal occupational health support was mentioned during the interviews by four headteachers. One primary school and a sixth form college were both members of local authority schemes that provided access to telephone counselling for staff members during times of personal stress; in addition, the principal of a sixth form college mentioned the provision of specific support services for staff undergoing mental stress, bereavement or other psychological difficulties.

It was noted in several interviews with senior leaders/governors, and across focus groups also, that many of the support requirements that needed addressing among staff, *'be [they] physical or mental... wouldn't be dependent on their age'*.

'We ... are committed to the staff's physical and mental wellbeing, so we will deal with [any health issues] and respond to what individual needs emerge... We cannot discriminate against [older] people and therefore have to be very careful what we do, both positively and negatively... What you need is a really good culture of caring for all your staff, as you have to think about when people are pregnant, ill or have problems with elderly relatives, these are all of a piece - you can't just assume that being 68 is a disability but equally it could turn out to be a difficulty'. (Headteacher, independent school)

Thus, the provision of occupational health support, counselling, and making adjustments to working patterns were reported during the fieldwork to occur for staff across all ages and were not perceived by headteachers and senior leaders to be related specifically to those working close to or beyond NPA.

'We are as flexible as we can be – there could be age, medical, childcare issues ... Managers are conscious of equal opportunities, HR [human resources] practice and age discrimination.' (Principal, sixth form college)

Generally, the teachers participating in the focus groups were managing a range of ill-health or other physical complaints associated with aging. Members of all focus groups reported common problems, particularly as a consequence of degenerative conditions affecting hips, knees and backs. For many participants, these appeared to be problems that they managed without seeking specific support from the school. The members of one focus group in a primary school felt that there was no consideration from the school about the physical demands of teaching as they aged. But rather than requiring additional support, they highlighted that acknowledgement of these issues by senior leadership teams would be appreciated.

'We just get on with it. It would make you feel more valued if people ask'. (Teacher, primary school)

In other schools, examples were given of the practical solutions that had been implemented to address the physical demands of teaching on aging workers; these included:

- Providing a trolley for a staff member to use to transport books and equipment; similarly, the provision of a parking space close to school buildings to minimise the distances required for carrying books
- Assessment of class environments to identify rooms that are more appropriate/accessible to meet the needs of older teachers

With changes in their role and adjustments made to meet needs – it was felt generally by teachers and headteachers/senior leaders that the practical challenges to working beyond NPA could be managed effectively in the workplace although they recognised how demanding the job can be and the difficulties in managing energy levels.

5. Strategies and Perceptions

This final section of findings examines the strategic considerations of working beyond NPA in schools and colleges, and the perceptions of others towards colleagues working beyond NPA.

5.1 Staff/succession planning

Formal strategic planning for staff retirement was not commonly reported by headteachers. Where strategic planning was in place, it was focused on short- to medium-term needs (such as reacting to a specific member of staff coming up to NPA) rather than a longer-term approach for managing staff working beyond NPA – which may become increasingly necessary as the impact of pension changes are more readily felt by the school workforce.

During the interviews, three headteachers said that they implemented a specific strategic approach for discussing and planning for retirement with staff members. These approaches tended to focus on the future needs of an institution, and thus followed two different methods:

- **Maintaining dialogue with staff:** incorporating discussion of retirement plans into individual staff annual review meetings so that communications and intentions are clear and enable planning (11-18 school; sixth form college). Once a decision about retirement is made, both headteachers said that they inform the governors and will work with them to devise the best way forward for the school.
- **Succession planning and developing younger staff:** Analysing the age profile of the school and increasing the size of relevant teams to 1) account for attrition, and 2) develop the expertise of other staff in preparation for the retirement of those currently in-post (primary school)

Across these three schools, where a teacher is performing well, engaged and respected by others then this is generally taken into consideration, balanced with the experience and expertise of other members of staff, and a plan for their individual terms of working beyond NPA will be set out before retirement age.

It was noted by one headteacher that schools need **time to prepare** for these changes, so advance notice for new flexible hours or part-time working was required as part of the teacher's contract. This headteacher suggested that notification of a request to change working pattern should be given to senior leadership teams/human resources personnel at least a year prior to the start date of the new arrangements.

Notably, the use of **supply staff** or the option of moving into **supply cover** was not regarded by headteachers as an appropriate mechanism through which to deal with the changes created by retirement/partial retirement - *'you can't make relationships, or gain fulfilment from student progress'* (11 – 18 headteacher). The use of supply staff was generally perceived by headteachers and governors to be an impractical, and financially unworkable strategy long-term. Feedback on this issue tended to focus on the impact on teachers themselves:

- Most teachers use the good relationships that they have developed over time to maintain young people's enthusiasm and commitment to learning – this would be lost when working as a supply/cover teacher
- The role would place increased physical demands on older teachers, rather than less, as they would potentially be moving around a school more or moving between schools with more travel
- For the individual teachers, the irregularity of the service requirement for supply staff would preclude organising any activities/travel plans during phased retirement.

Succession planning

'We have had a long-term view because we knew what the age profile of the school was and we knew where it was moving to, so we have made it possible for people to take a step down leading to retirement if that is what they wanted. We have tried to think about the long term future of the school so we have put people in a position where they are apprentices against more experienced people; so as the experienced people leave we have people who can move into those posts easily.'

For example, I have got a very large senior team (8) ...This is quite unusual in a primary school, and the reason for that is that myself and two deputies and two of the assistant heads will be retiring in the next three years. We need to make sure that we have people...working alongside [the more experienced staff] and they are getting the right experience for when the jobs are advertised'. (Headteacher, primary)

Where formal strategies were not implemented – and this seemed to be the more common situation – this was mainly because headteachers/members of senior

leadership teams said that they were not completely clear on the legal implications of offering advice or having a pension/retirement strategy in place.²

'[The head of the history department] came to me and said she wanted to phase her retirement; she didn't want to 'sprint and collapse', and I know based on statistics that is what happens to people who retire at 60/65, I thought that was very sensible. But legally that is not something I can suggest, that is something they have to think about themselves. We make available advice on pensions and their implications...but it does depend on the individual really'.

(Headteacher, independent school)

When discussing the idea of strategic planning for staff retirement, senior leaders/headteachers raised what they perceived to be a related issue of competency.

'It would be a difficult conversation with those who you would rather they retired and you anticipate there would be further problems if they stayed.

If they are finding it difficult, we would talk about monitoring, support, performance management and would not discriminate on age grounds but we have the same expectations, these don't change as people get older'. (Principal, sixth form college)

A headteacher in a primary school echoed this concern, voicing the query that implementing a retirement/working beyond NPA strategy could constitute 'age discrimination', particularly where there may be a 'competency' issue involved with an individual staff member.

Members of one focus group felt that the decision to work beyond NPA was down to an individual and that it should only be because *'the person still feels themselves to have the energy and be doing a good job'*. Another noted that the *'school's needs must also be considered...there are teachers who are not aware that their time to go has come'*. They suggested that schools should not feel pressured to retain a member of staff beyond NPA who may no longer be thought to be able to carry out the job effectively.

² The headteacher of a school that required improvement had instigated redundancies among staff. In this context, they reported that a strategy for planning retirement/succession planning had not been required in recent years.

Perceived difficulties of working beyond NPA

'If we had a member of staff who wanted to stay and...I didn't think it would be suitable for them or the school, I would get straight on the phone to HR and just ask what I can and can't say because I would be very worried about age discrimination. It is a very tricky area.

This is where you have to think about your capability procedures...I would want a script from HR before having those conversations...

I can foresee us ending up in a horrible situation in which you feel you have to agree to [a staff member working beyond NPA] to avoid a tribunal of age discrimination'.

There is a job to be done here with a high and demanding standard ...and the parents aren't going to feel sorry for someone because they are 66, they will just be seen to be complaining'. (Headteacher, independent school)

5.1.1 Making recommendations

The view among headteachers about recommending working beyond NPA to their staff was mixed fairly evenly. Where they said that they would recommend teachers work beyond NPA, headteachers said that staff needed to be enthusiastic, willing and able to do so (and that there were not long-term domestic health/care issues that they needed to attend to).

'I think it is important that the staff understand that there is a difference between wanting to stay and being able to stay on – our policy is that people can stay as long as they are making an appropriate contribution to the needs of the school and the children' (Headteacher, primary).

However, others were certain that they would not recommend that an individual works beyond NPA.

'If we had someone approaching retirement in their late 60s, I'd feel the best advice is ...certainly not teaching. It is exhausting both physically and mentally and people over 60 just wouldn't cope with a normal teaching post'. (Executive Head, Academy)

It was also felt by this interviewee that the bigger problem faced was the ability to recruit younger teachers, rather than retaining older members of the workforce.

5.2 Retaining experience and expertise

A concern raised by several of the headteachers was that the expertise of long-standing members of staff was lost upon retirement. To address this, two schools reported that they had a formal strategy in place to help pass on the skills and knowledge of older teachers prior to full retirement.

Transferring skills and expertise to younger members of staff

'There is a need for a succession strategy in the school because so many will be retiring soon; hence we are trying to make sure we bring our younger staff on so they will be ready to take on the mantle of the old staff.'

*A good example of that is my Inclusion Manager (62) who retired last year but has come back to do two days a week because we have employed someone as an Assistant Inclusion Manager. [The new member of staff] has worked with [the Manager retiring] as an apprentice for a year, to learn all of the ways we do things here and to learn about the networks we are part of – and then [the Manager] is completely retiring this year. She took her school pension when she first retired'.
(Headteacher, primary school)*

*'I think the younger teachers value the older ones' experience; you can see a lot of the younger teachers when they are planning lessons they will ask the older teachers how they have done things, how would they approach things. We encourage that sort of relationship. For example, one of the things we have done as a school is that we have organised it so that a year group of three teachers all have their planning, preparation and assessment (PPA) time together. They can plan together and I try to enable it that one of the [older staff] are available at that time as well; so they can invite them in to say we are talking about this, it is new to us, what can you advise. It has become part of the norm now to work this way'.
(Headteacher, primary school)*

Where the loss of expertise was an upcoming issue for other schools, they may not have had a formal strategy implemented but they were planning activities such as mentoring. A governor of an 11-18 school noted that institutions 'need' the experience that older teachers bring, and that retirement creates a gap in expertise that schools are not always prepared for in terms of being able to recruit or adequately train younger members of staff. To address this, staff working towards retirement had their teaching commitments reduced on their timetable so that they

could spend more time passing on their skills and experience to younger members of staff through mentoring sessions.

Headteachers suggested during the interviews that the expertise and understanding that older teachers have of the wider school/college environment is invaluable among support roles specifically, and in direct recognition of this they will do their best within resource constraints to retain these staff members for the benefit of other staff, pupils and parents connected to the school/college. Consequently (as per section 4.1) some headteachers have:

- moved experienced staff into specific areas of support work, such as small group teaching on particular areas of the curriculum
- created specialist roles that can be carried out through flexible working patterns, reduced the physical demands of full-class teaching (e.g. timetabling, SEN support, literacy mentoring).

Drawing on expertise of older teachers in specialist support roles

'[Older teachers] have made the decision to go part-time, and we have supported it because we felt that the areas they have gone into have actually been beneficial to the children [the school also contributed largely towards the cost of specialist training].

For example, one staff member used to be classroom teacher and went on to do an MA [Master of Arts degree]. She is now trained by the Dyslexia Institute and offers a lot of our specialist support, working at KS2 [key stage 2] and with other schools training teachers and teaching assistants how to manage children on the dyslexic spectrum. Another trained to do reading recovery and does that here now...Another who works part-time covers some of our PPA [planning, preparation and assessment] time and deputy head's release time...

They all work closely together. Although they can't always get to staff meetings, there is a group of part-time specialist staff who meet to discuss children's needs so they have their own little group that works well, they meet regularly then and they are a good support group for each other'. (Headteacher, primary school)

6. Concluding Comments

During the fieldwork, many benefits and positive outcomes (both for individuals and institutions/wider communities) were reported in relation to teachers working beyond NPA. Where individual teachers are motivated to work beyond NPA this tends to be because they enjoy the role, and want to continue to contribute to the local community whilst feeling valued by their colleagues, pupils and parents. However, where financial necessity was driving the decision to work beyond NPA, these individuals appeared to be less personally satisfied and motivated in their role – a concern that may increase as the implications of pensions changes are felt over the next decade or so.

The views of children/young people and parents is missing from this research, but there was a general sense that older teachers – often with long-term experience of a specific school community – brought a sense of stability, consistency and trustworthiness that enabled them to build trusting and positive relationships with colleagues, pupils and parents. These attributes were valued highly by headteachers participating in the research and were often the driving motivation for them to find a way to retain teachers working beyond NPA on their workforce, despite the logistical and budgetary constraints they experienced.

To retain the expertise and experience of older workers, headteachers are adopting flexible approaches to working hours and to part-time contracts. Other adjustments include changing roles to specialist support areas and small group teaching. In addition, simple strategies are adopted to reduce the physical demands of teaching on those working beyond NPA (e.g. support in carrying heavy loads; reducing the requirement of attending full day-trips; moving classrooms to those with better accessibility). This being said, occupational health support may not be accessed as much as it could be by individual teachers, who often reported managing age-related health issues without seeking support from the school/college. It was nonetheless important for headteachers to note, that any adjustment in roles (e.g. reduction of management responsibility or moving year group) needed to be made on an individual basis: headteachers were aware that some teachers would appreciate these changes, whereas others found them demotivating. Likewise, it was noted by participants that several of the issues highlighted in this report (particularly in relation to occupational support requirements) could be applied to staff of all ages – not just those working beyond NPA.

Despite the positive reports emerging from the institutions participating in this research, there were some issues highlighted that may require consideration by the Teachers Working Longer Review Group.

Not all teachers appeared to be aware of the range of options available post-NPA, and there was little evidence of planning ahead for retirement (some suggested they needed to start thinking /planning earlier and would appreciate support with this in terms of information sessions). This included clearer information on the options available, which outlines potential routes and raises awareness of the different options, whilst at the same time signposts individuals to sources of personalised/tailored guidance that will better suit their individual needs/situations.

Formal strategic planning for teacher retirement was not common in the institutions visited/interviewed. Headteachers may benefit from additional training in terms of the forms of information and support available, and also in terms of the language that they are able to use during these conversations with staff. In particular, anxieties were common among headteachers in relation to avoiding any perceptions of age discrimination. Leadership teams may therefore benefit from additional support in terms of how to manage the routine assessments of capability/competence of older workers (particularly in the context of equality legislation) and sensitively address the outcomes of these assessments within the context of each institution.

The logistical challenges of teachers working beyond NPA focused on timetabling, particularly for increasing numbers of part-time teaching staff, and the financial constraints of meeting the salary grades of a highly experienced long-term workforce. More training opportunities in relation to managing flexible timetables for part-time staff may be useful for senior leadership teams in future.

Nonetheless, headteachers and teachers commonly reported that flexibility, compromise (by the individual and the institution), and clear and consistent communication between all parties enabled an environment within which the challenges of working beyond NPA could be managed. Older teachers were specifically valued as mentors for younger staff, with skills and experience that headteachers were prepared to retain where and if possible.

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