

# **Teachers Working Longer Review: final report**

**Produced by the Teachers Working  
Longer Review Steering Group**

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## Introduction

1. In autumn 2014, the Secretary of State for Education commissioned a review into the possible health and deployment implications of teachers working longer as a result of the increase in normal pension age (NPA) in the Teachers' Pension Scheme (TPS) and the link between the NPA and State Pension Age (SPA).
2. A steering group made up of employers, unions and Department for Education (the Department) representatives oversaw the tri-partite review. A full list of organisations is at Appendix 1. Those organisations nominated representatives to form the Working Longer Review Group, which was chaired by the Department. Information about the review, such as their terms of reference, minutes from their regular meetings and their interim report were published at:  
<https://www.gov.uk/government/groups/teachers-working-longer-review-group>
3. The Working Longer Review Group set out to explore the possible health and deployment implications of teachers working longer; to consider options that may mitigate these implications where necessary; and to make recommendations to the Secretary of State for Education.
4. The Group also aimed to provide evidence that may be used by stakeholders to contribute to any government reviews of the state pension age (SPA) and the link between NPA and SPA in public sector schemes. The Group acknowledge that they need to do further work and gather further evidence about the appropriateness of a continued link between the NPA and the SPA because this report does not address that issue in sufficient detail. Their recommendations seek to address that.
5. The review focussed on teachers who are eligible to be members of the TPS and who are employed in state-funded and independent schools and sixth form colleges. Members of the TPS working in Further or Higher Education were not, therefore, included in the research.
6. In turn, the key focus is on teachers who are more likely to work longer than was previously the norm, in particular those whose NPA changed as a result of reforms introduced by Public Service Pensions Act 2013, and those who commenced teaching since. The work of this Working Longer Review Group, its findings and recommendations, are vital to ensure that the impact of teachers working longer is as positive an experience as possible for teachers, employers and pupils alike.
7. The Group's work shows that those teachers who are older and have already chosen to work longer perform as well as their younger colleagues. Those older teachers are often valued by their managers both as teachers and as mentors. The main factors that have influenced those who have chosen to work longer have been financial, personal and professional – areas that are explained and developed in more detail in this report.
8. The Group also concluded that the current workload pressures reported by teachers is as relevant to older teachers as it is to younger teachers, but noted that part-time teachers of all ages reported workload as a major concern. As some

older teachers work part-time, and in the future it is likely that more may wish to choose flexible working arrangements such as part-time working as a way of helping them to work longer, consideration was given to this when putting forward the recommendations.

9. The Group was also mindful that, currently, the data and research available to them was about and from teachers who chose to work longer. Whilst their recommendations are evidence-based, the Group's recommendations include the need to continue with this work so that emerging challenges and issues as more of the teaching workforce work longer are identified.
10. This report also considers how teachers are and should be helped throughout their career – not just towards retirement age – in terms of their health and well-being, their career development and their knowledge and understanding of the pension scheme and the flexibilities and the benefits it offers them at various stages of their career.

## Overview

11. The report focuses on the available evidence and research into, and the review's findings, in respect of two main areas:
  - i. The evidence about the impact of working longer, specifically:
    - a) 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;
    - b) the medical conditions which underpin applications for ill-health pensions, and how these could be addressed;
    - c) 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
    - d) the current teachers' ill-health pensions provision; how suitable it is for teachers who are working longer and how well the provision is understood by members and employers.
  - ii. Employment practices which could support teachers working longer:
    - e) 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;
    - f) what good employment practices look like which would support teachers to work longer, and how these practices could be developed, promoted and shared;

- g) the extent to which, and the reasons why, older teachers drop out of the labour market, including the employment experience of older teachers;
- h) 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
- i) 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.

12. In considering the issues, the review has taken into account the Public Sector Equality Duty which requires that public bodies:

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

## Evidence Gathering

13. The first stage of the call for evidence was launched in February 2015 and ran alongside two rapid evidence assessments (REAs) undertaken by researchers commissioned to assess available research evidence on the issues being considered (full details of which can be found in the section below). The REAs can be found at Annex A and B. This first stage of the call for evidence covered organisations that were members of the steering group and two other organisations selected by them: the Teachers' Support Network and the General Teaching Council for Wales. It invited organisations to submit any evidence that their organisation held or was aware of that would support the review and, in particular, details of any published research, published articles, grey literature or research studies that were underway that would be likely to address research questions derived from the objectives of the review.
14. Four responses were received, which included 13 documents. These submissions were forwarded to researchers for use in the REAs.
15. A second stage, wider call for evidence was launched in September 2015. This was a public call for evidence run through the Teachers' Pensions website and further publicised by members of the steering group through their own communication channels. In addition to asking for details of published research, published articles, grey literature and research studies underway at that time, this stage also included a set of questions designed to identify barriers/enablers to working longer and examples of employment practices that could support or hinder working longer.
16. Eighteen documents were submitted and 122 respondents answered the additional questions. This information was analysed and used by the steering group to inform their thinking on further research requirements and identify initial conclusions, as well as helping the group to determine this final report and recommendations.
17. Details of the documents submitted in response to both stages of the call for evidence are at Annex C. Summaries of the responses to the questions posed at the second stage of the call for evidence and of the documents submitted at that point are at Annex D.
18. Due to the timeframe for the planned completion of the Working Longer Review, REAs were deemed the most appropriate method for reviewing the existing evidence and identifying gaps. That is, they would ensure that a robust assessment of the evidence already available could be undertaken whilst also allowing time for additional primary research to be done, once further issues and gaps in evidence had been identified.
19. In January 2015 the review, therefore, commissioned two REAs in order to provide an assessment of the academic and other evidence on the impact of working longer and on employment practices to support working longer. The contractors appointed, ICF Consulting Services (impact) and the Institute for Employment

Studies/Pensions Policy Institute (employment practices), each reported to the relevant sub-group responsible for the strand of work under which their REA fell. Both REAs looked at literature published in English and other languages, from 1990 to the current time.

20. In considering the REAs, it became apparent that the dividing line between the two groups of issues (impact and employment practices) was often indistinguishable and that there was significant read across between the evidence and issues uncovered by each. The sub-groups merged with the steering group to ensure joint consideration of both reports and all the issues involved.
21. The findings from the REAs, and consideration of the other evidence submitted in response to the call for evidence, enabled the development of initial conclusions and an appropriate research design to fill key gaps/address key issues through additional primary research.
22. Several potential further specific pieces of work were identified, but the group prioritised two projects that could be assessed within the review's timeframe, available data and resources. Contractors, whose services were procured by the Department, carried them out.
23. The first of these research projects (the report Working in the Teaching Profession Beyond Normal Pension Age is at Annex E) was carried out by CooperGibson Research during late spring 2016 and was designed to provide insight into what currently motivates teachers to stay in the teaching profession beyond NPA. The study investigated the benefits to teachers and the school, and considered the factors and management and retention practices that enable them to do so, any difficulties, and the types of support provided to older teachers by schools.
24. The study was carried out in 10 schools and colleges and involved focus groups with 62 teachers and 19 interviews with head teachers, governors and senior leaders. The research was qualitative and was carried out with a relatively small sample, so care was taken when presenting the findings. The group acknowledged that the report provides an informative snapshot of issues, challenges and benefits for those who work longer.
25. The second of the projects was an exploratory secondary data analysis using matched administrative data i.e. the School Workforce Census (SWC), TPS data, and OH Assist Ltd data, by Nick Coleman Ltd. The "Teachers and ill-health retirement" report is at Annex F. The group felt that there was anecdotal evidence that some teaching roles are more highly associated with early retirement through ill health. The project explored this hypothesis.
26. Overall, 3.4% of teachers who retired between 2010 and 2014 took ill-health retirement (1,952 out of 56,786 teachers). The profile of teachers who retired early due to ill-health was generally very similar to that of teachers who took other forms of retirement.
27. The Group also considered the Chartered Institute of Personnel and Development's (CIPD) report ["Creating Longer, More Fulfilling Working Lives"](#) which investigates how employers can best manage an increasingly older workforce in the context of their health and well-being and care responsibilities.

Although the study was not specific to the teaching profession, the group noted similarities and themes that were applicable, for example the need to manage retirement and foster an-age diverse culture. The study investigated and compared practices and attitudes in the Czech Republic, Denmark, France, Germany and the UK.

## **Summary of Evidence**

### **Overview**

28. The following sections summarise emerging themes in relation to working longer drawn from the evidence uncovered by the review. The existing research evidence, as covered in the REAs, is limited in some areas (for example whether ageing affects teachers in specific roles); with some of it being several years old and some showing conflicting opinions. The additional research work commissioned for the review sought to explore key gaps.

# Key Themes

## Impact of Working Longer

### a) Impact of ageing process on roles

29. Evidence provided at Annex A suggests that the key cognitive skills needed for teaching do not deteriorate significantly before age 70. Furthermore, that the age of teachers does not have a noticeable effect on student performance and therefore older teachers continue to play an equal part in improving student outcomes, with there being no evidence of a negative impact because of ageing.
30. Teaching is demanding for all teachers, but qualitative research (Annex E) commissioned for this review suggests that reduced energy levels and increased physical limitations coupled with workload pressures can make the teaching role more difficult for older teachers.
31. There is a lack of evidence on how ageing impacts on specific teaching roles. The “Teachers and ill-health retirement” report (Annex F) suggests that for secondary school teachers, the figures for those teaching over the age of 60 years are generally consistent across the different subjects. However, teachers of the following subjects were slightly less likely to be working beyond the age of 60: Physical Education/Sports, Drama, Music, Geography and Information and Communications Technology.
32. Evidence shows that whilst older teachers appear more likely to report health issues linked with their job, particularly musculoskeletal<sup>1</sup> and other physical issues, they also report less stress than less experienced teachers do (Annex A).
33. The teaching profession appears to have a lower rate of sickness absence than other professional workers do, though this levels out from age 55 upwards with levels being similar to other professionals at that stage.

### b) Conditions that underpin applications for ill-health retirement

34. Physical conditions, such as cancers, diseases of the nervous system and musculoskeletal problems, are among the most common reason for teachers being awarded an ill-health retirement pension; with mental health/stress related illnesses also likely causes of individuals being judged permanently unfit to teach.
35. The rate of ill-health retirements has remained constant over recent years, having previously been significantly higher until changes were made to the incapacity criteria, application process and benefit structure to ensure these benefits are

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<sup>1</sup> Musculoskeletal (MSK) disorders include back pain, neck or arm strains and diseases of the joints.

better targeted to need. Current rates are broadly consistent with those for other workforces.

36. As expected, rates of ill health retirement are greatest amongst older age groups, with the highest rate being for those in the 55-59 age group. This indicates that older teachers are more likely to suffer from serious or chronic illnesses than younger ones, given that most of those who are judged eligible for ill-health retirement have illnesses/conditions that mean they are considered permanently incapable of undertaking any work, and receive additional total incapacity related benefits as a result.
37. The evidence from the group's commissioned report regarding ill-health retirements at annex F suggests that special school teachers, middle leaders and classroom teachers, those in the teachers' main pay range and teachers working full-time are slightly more likely to retire on ill-health grounds than senior leaders and headteachers, but only by a small margin. Teachers were also slightly more likely to take ill-health retirement if they worked in schools with higher levels of pupil absence, or deprivation.
38. Of those teachers retiring early, teachers were most likely to be affected by cancer (23%), mental health conditions (20%) and diseases of the nervous system<sup>2</sup> (19%). A slightly smaller proportion (15%) were affected by musculoskeletal conditions. However, although the reasons were similar between primary and secondary school teachers, special school teachers were more likely than other teachers to retire early because of mental health (33%) and musculoskeletal conditions (22%).
39. Female teachers were more likely than male teachers to retire early because of cancer (27% compared with 15%) and musculoskeletal conditions (17% compared with 11%), while male teachers were more likely to retire because of mental health conditions (26% compared with 17%) and diseases of the nervous system (24% compared with 18%). The gender difference is at odds with the general picture in the population as a whole, where mental health conditions are more likely to be identified among women than men.
40. Teachers working full-time were more likely to retire early due to mental health conditions (23% compared with 15% of part-time teachers), while those working part-time were more likely to retire because of diseases of the nervous system (25% compared with 17%).

### **c) The availability and quality of Occupational Health support**

41. The evidence at Annex A in relation to occupational health provision in the teaching profession suggests that the level of service available to support teachers, and the extent to which it is used, varies. Some employers do offer/buy-in a comprehensive service, which is used within effective human resource management arrangements to pro-actively support health and well-being and offers

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<sup>2</sup> Problems of the nervous system include [multiple sclerosis \(MS\)](#), [Alzheimer's disease](#), [Parkinson's disease](#), [epilepsy](#), [shingles](#) and [stroke](#)

consultations/interventions at an early stage – but this is not the norm. Evidence points to it often being the case that interventions do not take place until the point that the teacher's illness has developed significantly and ill-health retirement is being considered. The qualitative research suggests that occupational health support, counselling and adjustments to working patterns were acknowledged by head teachers and senior management as valuable options for teachers at all stages of their career. However, the evidence supports existing evidence from the REAs and anecdotal evidence from the working group's members that occupational health support is not consistently available across all schools.

42. The Group noted the findings of the CIPD's report on the value of occupational health services that quoted a good model, whereby all employees have access to a monthly on-site occupational health clinic. It showed the value of the occupational health team having a good understanding of the company's operations, work environment and the requirements and limitations of specific roles, which meant they could tailor and make appropriate recommendations based on individual needs. In the example quoted, this has successfully led to some workers remaining in work when they might otherwise have had to leave employment.
43. Given the value of good occupational health provision is clearly established, and that some schools are not utilising that to full effect, it would be of benefit to explore and spread the knowledge gained from the examples of good practice that already exist. Other moves to develop a wider understanding of the value of good human resource management, and specifically the part occupational support can play in that, should also be explored; for example, the scope to incorporate relevant learning opportunities about this within the process for gaining qualified teacher status.

**d) How well do the current ill health provisions support working longer and how well understood are they**

44. Whilst evidence shows that current ill-health retirement provisions work well, it is not clear whether they will continue to support teachers appropriately, as teachers begin to work longer than is currently the norm. This is not surprising given the change to a higher pension age has only recently been implemented.
45. What evidence the Group did consider showed that general awareness of pension provision and employment options under the TPS is poor; and some are confused about their entitlement and where they should go for advice and information. For example, some do not understand that the award can be higher for in-service awards, or that they do not need to be totally incapacitated to do any work to receive ill-health benefits – though they cannot of course return to teaching and retain their benefits.

## Employment Practices

### e) Career pathways that could support working longer

46. Evidence on career pathways available to teachers shows that members of the leadership team are more likely to have access to a wider range of options when considering changes in career pathway than classroom teachers may have. For the latter, it would appear that the only two readily available options are promotion through the management chain and undertaking supply teaching. In contrast, teachers in the senior leadership team may have access to other options, which include working as local authority advisors, working across a number of schools in multi academy trusts or school federations, job sharing and co-headships. There is no evidence, however, of any difference in the options that are available to older and younger teachers, or of options that are used specifically to assist working longer.
47. Evidence suggests that the most popular option is for teachers to reduce their hours; or reduce their responsibility – for example, leaving their management role but continuing to teach; but it was noted that senior staff also leave teaching in favour of advisory or inspectorate roles. The study also mentions specific examples of primary school teachers moving to teaching older year groups so that the physical demands were reduced (larger furniture, less time sitting on the carpet with very young children); older staff moving into specialist support roles; and also moving into new non-teaching roles, such as school librarian.

### f) Employment practices that would support teachers to work longer

48. Evidence suggests that supportive management practices, whereby there is a positive attitude/culture towards the value and managing the well-being of older teachers, and the use of alternative career pathways and flexible working, would all help to motivate teachers to work for longer. Feeling valued, having autonomy and support for well-being are cited as major factors which can motivate teachers to work longer, so management practices which support teachers and give them control over their work are key factors here. There is some evidence that head teachers are adopting flexible approaches to working hours, for example changing contracted hours to allow older teachers to work part-time. However, there is less evidence that other adjustments are being considered, such as changing roles and other innovative solutions.
49. It was noted that in primary and secondary schools in Horsens in Denmark, a compulsory conversation takes place with teachers when they reach 50 years old. Managers discuss their career plans and how their conditions for working longer might be accommodated, with similar conversations as part of the annual appraisal process. Managers identified special roles for older teachers which used their experience, such as mentoring newer teachers and leading projects; additionally flexible conditions (hours, duties) and training (such as in digital teaching and learning) were introduced. This project increased the number of teachers working

after the age of 60 by 50% in 5 years. The Group noted a similar concept in John Cridland's independent review of state pension age, "[Smoothing the Transition](#)".

50. There is evidence that where managers had made it the norm from the outset to discuss retirement, career progression and specific roles that were most suitable to the employee at various stages of their life, there was less concern from managers and employees when holding such conversations with older staff members. The Group found this practice interesting and believed that such conversations with teachers annually would not only support older teachers to work longer, but would help younger teachers to plan their career and their retirement from a very early age.
51. The Group was also interested in the findings of the CIPD report, which highlights that retirement should be a process, and that positive discussions help ensure an effective transition from work into retirement. Although not specific to teachers, the report emphasises that phased and partial retirement in particular gives workers the flexibility they need to support their individual circumstances and aspirations.

#### **g) The extent to which and why older teachers leave the workforce**

52. The evidence on why older teachers leave the profession is limited, with most of what is currently available focussing on early exits or the pension benefits taken (but not the reasons behind the retirement route involved).
53. Teachers themselves cite reduced energy levels/increased physical limitations and workload pressures as the two most likely reasons which they perceived as difficulties in working beyond NPA (refer to Annex A). Work-life balance concerns are seen as a significant issue during mid and late career phases in particular.
54. The Group considered what the barriers might be to teachers working longer. The research suggested that there were several perceived difficulties to working beyond NPA. There were personal considerations, for example: family commitments, such as caring for relatives; less motivation; wanting to enjoy retirement to the full; and reduced energy levels/increased physical limitations. Professional barriers to continuing included: workload pressures; changes in the curriculum; constant accountability of their work; and reduced resources available. However, often a combination of factors creates a perceived barrier for teachers working longer; for example, workload pressure becomes more difficult to cope with as energy levels reduce or outside commitments increase.
55. Some cited failure to feel supported by managers and the culture within the school towards older teachers and flexible working as key factors in some older workers leaving the profession. Appreciation of their experience and expertise from colleagues, managers and parents encourages teachers to go on working to an older age. The research also confirmed that maintaining energy levels, difficulties coping with the physical challenge generally (for example, standing all day), as well as the workload being difficult to manage, (for example because of changes in policy and practices) as challenges that can lead teachers to consider leaving the profession.

56. 'Pull' factors also influence the decision to leave early, these include financial well-being, family issues and the desire to pursue hobbies or travel plans.
57. The evidence suggests that there are a variety of motivations that have influenced teachers to continue working beyond their own current NPA – the three main ones being:
- Financial – either wanting or needing to maintain an income, perhaps due to funding children through university or having had career breaks during their own career,
  - Professional – enjoying and contributing to the role – still getting job satisfaction and remaining mentally stimulated.
  - Personal – maintaining an active lifestyle, social life whilst gaining satisfaction from helping young people develop.

#### **h) The extent to which TPS flexibilities are understood and used**

58. Although the amount of evidence about the level of understanding of the TPS and its flexibilities is limited, what is available suggests that understanding remains low. This is borne out by qualitative evidence, many teachers and senior leaders referred to how confusing pension and retirement information can be, and that it was too generic to be completely useful to individuals. There was little awareness of the available options. Older teachers are more likely than younger ones to understand the options, but that reflects that many younger people are not thinking about retirement, with retirement planning and pension issues often only being considered towards the end of their careers.
59. Evidence shows that take up of phased retirement, which is a form of flexible working, has been low. This suggests that understanding may be poor among members and managers alike and also that the cultural issues mentioned above may be getting in the way of individuals having the chance to take this option – which normally requires employer consent. The low take up is particularly surprising given that evidence also shows that partial retirement in the years before full retirement is an attractive option for many.
60. The Group was concerned that the evidence indicated that current availability and quality of information was not keeping up managers' and members' knowledge of the options and benefits available. This has led to one of the Group's recommendations about better education of the membership being key to retaining teachers longer.

#### **i) The extent of current flexible working within the teaching profession**

61. From the limited evidence that is available on the use of flexible working it is clear that the opportunity to do so varies enormously from school to school. The reasons cited include cultural issues in schools, school managers' attitude to the use of flexibilities and practical difficulties such as timetabling.
62. The opportunity to work part-time seems to be the most commonly available flexibility. There is little evidence to show what other options are used or are available – which may be due to contractual constraints, management attitudes or

lack of manager consent. For example, the chance to move to a role with less responsibility and the option to no longer undertake additional management or teaching and learning responsibilities are not commonly used.

63. It appears that options to take on a less demanding role or to work part-time are not routinely considered to help teachers who are suffering from ill health to stay in the profession longer. This happens despite evidence that suggests if more opportunities to move to a role with less responsibility or to part-time working were available, some teachers may delay retirement. Such teachers tend to feel that they will struggle with the physical and other demands of teaching as they get older, and the option of a partial retirement, possibly with reduced pay topped up by pension, is appealing.

## **Evidence Gaps**

64. Several evidence gaps in relation to the Review's objectives have been identified and some of them are quite considerable. Much of this is because relatively few teachers currently work into their sixties, those who do, do so voluntarily and are thus likely to be more physically able to do so.
65. This is particularly apparent in the limited evidence regarding the impact of ageing on each teaching role and of the actual implications in practice of teachers working into their mid and late sixties, either from the UK or internationally. There is also no substantive evidence available on how effective the current ill-health provisions within the TPS will prove when more teachers work into their sixties and evidence on occupational health provision is very limited.
66. Evidence gaps are also apparent in relation to the effectiveness of positive age management policies and practices, the extent of the use of flexible working arrangements and the level of understanding of TPS flexibilities following recent changes.

## Overarching Conclusions

67. After careful consideration of all the evidence, the Review has drawn their conclusions:
- i. The Group found no evidence of cognitive impairment before the age of 70 years.
  - ii. Older and therefore usually more experienced teachers are a valuable part of the education workforce and that should be promoted.
  - iii. All parties (including the Department, local authorities, academy trusts, Unions, local school leaders, governing bodies, proprietors and teachers themselves) have a part to play in: reinforcing the value of older/experienced teachers; promoting ways of best managing the whole workforce; and ensuring that the value of maintaining teacher health and well-being is reinforced from the point of initial teacher training onwards.
  - iv. Due to the importance of ensuring teachers are supported appropriately; the complexity of the issues involved; and the fact that there are gaps in the evidence that can only be addressed in the longer term, there appears a strong case for the review group to continue. The Group will consider how that work should be done, including what further data should be collated to support some of the recommendations; and monitoring the implementation of recommendations that may be carried out in the shorter term.

## Conclusions Relating to Specific Review Objectives/Issues

### a) Impact of ageing process on roles

68. The evidence suggests that ageing affects some aspects of the teaching role, more specifically the physical demands of the role. However, there appears to be no evidence that there is a strong link between physical roles and ill-health retirements. What the evidence suggests is that where teachers have chosen to continue working longer, they can do so effectively, and there are various adjustments that can be made to support more teachers to do so. As well as adjusting their role, their environment or their working pattern, practical support from leaders and specialist support from occupational health can help reduce the impact of age and enable teachers to continue teaching longer.
69. However, the evidence available is based principally on those teachers who have chosen to work longer and therefore new data will be required to monitor and review impacts as more teachers work until, or near to a higher State Pension Age. Such data will also inform Government's policy on whether the link between SPA and NPA continues to be appropriate to the teaching profession.

## **b) Conditions that underpin applications for ill-health retirement**

70. The majority of ill-health retirement pensions for teachers are because of issues related to: cancer, the nervous system; mental health; or the musculoskeletal system. There is some variation to the pattern for the population as a whole but there is no clear cause for that and thus it is difficult to identify potential mitigations – beyond the overall value of moves to supporting workforce health, and within that mental health.
71. The Group's study of ill-health retirements between 2010 and 2014 showed that the reasons for ill-health retirement varied only slightly according to teachers' characteristics. Given that the variations are so slight, and the study did not identify any clear cause for them, there appears little to be gained from exploring different approaches for different types of teacher.

## **c) The availability and quality of Occupational Health support**

72. The health and well-being of teachers is vital if they are to be able to continue working longer. It is therefore important that access to occupational health support is encouraged whatever the age of the teacher. This could help teachers to avoid developing or better manage conditions that could have resulted in ill health in later life. The value of proactive, timely and effective occupational health support should be emphasised with the aim of extending consistent accessibility and take up. This could include persuading leaders and teachers to understand and focus on the benefits rather than perceived risks, guiding managers how to use occupational health effectively as part of normal HR practices throughout teachers' careers, and potentially guidance on what service schools should be looking to procure, along with how to identify potential providers. The latter could include emphasising the opportunity to club together with others to make purchasing an appropriate level of support more accessible, with there being current examples of that being done effectively.
73. Teachers cite health as a major concern in being able to work longer and there will be new challenges involved in maintaining health and well-being as more teachers work into their sixties and towards the higher SPA. Good quality, responsive occupational health services should be consistently available.

## **d) How well do the current ill-health provisions within the TPS support working longer and how well understood are they?**

74. It is evident that the arrangements are not widely understood and therefore steps should be taken to educate and raise awareness. In addition, the ill-health pension arrangements in the TPS should be kept under review, to take account of changing trends as more teachers begin to work longer.

**e) Career pathways that could support working longer**

75. Career progression routes, other than through the management team, or as a member of the management team, are limited. Members of the management team have access to more options than classroom teachers, for example, consultancy roles or job sharing. However, for teachers, the most popular options are to reduce their hours or their level of responsibility. There could be value in exploring and spreading knowledge of examples of alternative practice, particularly for classroom teachers, and developed as part of gaining qualified teacher status (QTS).

**f) Employment practices that would support teachers to work longer**

76. All schools need to foster a positive age-diverse culture that values all age groups, and recognises the skills and experiences that older teachers can contribute. They therefore need to consider how certain policies and programmes, such as flexible working, directed at one age group will affect the wider workforce. This does not mean that a school should not introduce specific policies with certain age groups in mind, and the high proportion of informal care provided by older workers for the increasingly ageing population means that provision is needed to help people balance work and caring responsibilities. This can include flexibility in working hours and/or the ability to take time off work. The often unpredictable demands that are placed on people when caring for a relative who is ill and/or old means that many organisations will need to think more creatively about the kind of support and flexibility that employees in this position may need.
77. Examples of good human resource (HR)/management practices should be identified and promoted, in particular, effective ways of managing an age diverse workforce and whole career approaches to health and well-being.
78. Local practices, culture, and school leaders' perceptions of the value of older/experienced teachers appear to be factors that can get in the way of helping individuals to work longer. Championing positive attitudes and promoting better understanding and best practice are essential if there is to be a consistent and comprehensive solution/approach.
79. Ensuring that professional development opportunities are offered to the whole workforce will also ensure that older teachers feel valued, and keep skills and knowledge refreshed, giving them more confidence.
80. Teachers need to feel confident discussing their career plans - including retirement plans with managers. It is also important that there is no stigma attached to older teachers wishing to take on new roles or attached to those roles. Employers and managers should ensure that such changes are considered a positive change for the school as well as the individual.

### **g) The extent to which and why older teachers drop out of the workforce**

81. Health issues are cited as a prime reason for older teachers choosing to leave early. Steps to do more to promote health and well-being throughout teachers' whole careers should therefore be considered.
82. Workload is also cited as a major factor that influences decisions whether or not to work longer. Consequently, it is essential to ensure join-up between this review and the Department's workload challenge project, to ensure evidence and findings are shared and acted upon appropriately. The Group consider that more longitudinal research should be carried out by the Department.

### **h) The extent to which TPS flexibilities are understood and used**

83. Knowledge of the TPS and its flexibilities, and how this can help in career/workforce management, remains limited amongst the workforce and school leaders. The communications and "retirement journey" work that Teachers' Pensions are currently undertaking is key to addressing this. Personalising the message and delivery will help employers to use the scheme effectively, and will gain the attention of members so they engage with the options available. (This should also cover ill-health retirement arrangements effectively, in line with (d) above).
84. Enabling teachers to make the right pension and retirement decisions to suit their life choices was something the Group felt was very important. It was agreed that employers and teachers should be helped to improve their knowledge of the scheme rules, how future changes will work and how the different flexibilities apply. How and when this information is presented to the various scheme members will be an important consideration in ensuring teachers make informed choices. The more often and effectively the information and options are communicated, the more staff will be able to work longer if they choose to, or retire with minimum financial impact.

### **i) The extent of current flexible working within the teaching profession**

85. Access to flexible working arrangements, including options to step down to roles of lesser responsibility or part-time, can help extend working lives and ways of promoting examples of good practice should be explored.
86. Teachers are very professional and show great commitment to their role in teaching children. Those who wish to continue working but need different working hours or conditions in order to keep doing so should be accommodated wherever possible. More work is needed to understand the impact of an aging workforce, with potentially more requests to change working hours, reduce responsibility or change the working environment.

# Recommendations

## 1. Culture: There needs to be greater recognition and celebration of older teachers as an important part of the teaching workforce.

Evidence clearly shows that age is no barrier to a teacher's ability to provide effective outcomes for children and young people. In particular, it shows that the cognitive abilities needed to teach effectively do not typically diminish until individuals are at least into their seventies and that there is no negative link between the age of teachers and educational outcomes. In other words, good teachers are good teachers irrespective of their age. There is also evidence that older teachers add to the overall educational environment through extending the range of experiences, perspectives and knowledge that students can draw upon. Older teachers should be recognised as an important part of the workforce – for their experience, as well as being mentors – and managers must embed that culture, mindful of their duty to treat their workforce equally, irrespective of their age.

The Department, Local Authorities, Academy Trusts, Local School Leaders, Governing Bodies, Proprietors and Teachers themselves have a vested interest in ensuring individuals are supported to have long healthy careers in teaching, including through supporting the recommendations in this report.

**Action:** All involved in education have a part to play in ensuring the value of effective teachers of all ages is recognised and promoted and to challenge and dispel misconceptions about older teachers. All should work towards this culture being the norm and ensuring that teaching is clearly seen as a profession that individuals can, and will want to if they so choose, spend their whole career in.

- The Department to consider how change in culture should be linked with strengthening QTS and improving career progression opportunities for all teachers to aid teacher retention
- The Department to consider a campaign that may help promote and achieve a more positive culture, for example, spreading the message of “older teachers” being assets to schools.
- The Group should continue to contribute to the Department's work.

## 2. Teachers' Pension Scheme (TPS) Information and Communication

The TPS arrangements contain provisions that support workforce management and flexible working. For example, the career average arrangements support flexible careers where teachers have changes in role and earnings levels. That is, reductions in earnings level do not affect pension already banked and the insurance type benefits (e.g. total incapacity/death benefits) are based on full time earning levels.

However, it is clear that many teachers and their managers do not understand the TPS provisions, particularly in relation to ill health or phased retirement, and there is even some confusion about what their own retirement age is in some cases. Literature targeted at educating teachers from the start of their careers should be developed in order to educate them as soon as possible as to their options and the value of the pension.

Enabling a good understanding of the TPS within the teaching profession will mean that teachers can make informed decisions about their career and retirement options. Employers too need support in understanding the scheme to improve the support they provide teachers and understand how they can use the scheme to support recruitment and retention of teachers, in particular by allowing flexible working. The current review of the employer's role in the TPS is likely to help. Because of that, TP will be re-visiting guidance and taking over some of the member related TPS administration from employers in 2017. This will include sending information about the TPS to new members, including providing information about scheme flexibilities.

**Action:** TP to continue to consult different age groups of teachers and employers to understand what they need and when – and, depending on that feedback, aim to:

- improve the on-line portal with, for example, additional simple factsheets, calculators and more personalised pension account information;
- consider the best ways of educating and communicating with teachers, and managers;
- work with employers to provide accessible training for teachers on pensions and retirement planning; and
- provide those joining ITT with access to information about pensions as part of career management training.

### **3. There needs to be consistent and effective support for teachers' physical, mental and emotional health and well-being throughout their career.**

Ill health accounts for a relatively small proportion of early exits from teaching and sickness absence rates are low compared to other professions, nevertheless teachers themselves cite health as a major concern in being able to work longer and there will be new challenges involved in maintaining physical, mental and emotional health and well-being as more teachers work into their sixties.

When integrated with effective sickness absence and management practices, a good quality and responsive occupational health service can help: avoid illness and injury occurring in the first place; provide appropriate support in treating and managing conditions once they appear; and help determine options where adjustments or choices need to be determined. Currently the extent to which such support is valued or available varies significantly, whereas it should be the norm that teachers and employers have access to good quality occupational health support whenever needed.

Available evidence does not show a clear link between issues of ill health and particular types of teaching role or working in particular environments/settings (e.g. urban areas or schools with higher rates of deprivation/lower attainment).

Nevertheless, managers need to be alert to the potential need, and sources of support in how to redesign roles or consider redeployment where necessary.

**Action:** Consideration should be given to further research into and ways of spreading good practice with a view to:

- providing guidance and training for managers as to how they can better support people's health and well-being, such as spotting the early signs of ill health, managing sickness absence and facilitating good rehabilitation, which the Group may support and challenge as work progresses;
- promoting the value of good occupational health support, and within that investigate the potential for schools to, as a minimum, tap into the services of the national Fit for Work Service to provide targeted occupational health support;
- identifying examples of how schools have effectively overcome challenges faced by individual teachers who are suffering from physical and mental ill health or living with long-term health conditions, in particular through job redesign or redeployment;
- looking within the Department to establish links with the work on strengthening QTS and improving teacher career progression and teacher retention work to ensure that older workers are very much a focus of that work; and
- considering within the Department how effective the current ill-health provisions within the TPS will prove when more teachers work into their sixties.

#### **4. Managers need more support in managing an age diverse workforce and getting the best out of older teachers**

Whole career planning is a key way in which to help those who choose to work longer to do so. Managers have a key part to play through ensuring regular open and clear dialogue with teachers about the support they need to meet the challenges faced at different stages in their career. That will in turn ensure teachers feel valued and have a real part to play in determining their career whilst also ensuring schools get the best out of all teaching staff. Challenges facing teachers include: dealing with health or caring issues; how to maintain or develop skills in order to meet expectations or career development aspirations; how to ensure effective interaction with younger teachers; and planning for their career and retirement. Embedding age management/career and development conversations within regular performance management conversations should be the norm for teachers of all ages, and is an ideal way of ensuring the right conversations take place. Different types of conversations will need to take place throughout a teacher's career depending on their circumstances, their age, their ambitions and so on. As part of that, at a certain point, teachers may want to have a more focused conversation about their later

career and retirement options. Understanding those options, with support from managers, will enable them to make the right choice for them.

At present, the extent to which such thinking and discussions take place varies significantly. Some of that is down to lack of understanding of the benefits involved, particularly for the school, but it is also the case that managers can be fearful of having such conversations due to a lack of knowledge of rights and responsibilities. Managers need support to understand the legal issues surrounding employment and individual rights. They also need support in recognising the benefits involved and in structuring conversations effectively to ensure all relevant issues are covered. They need to be supported to be able to ask open questions of their staff, in the context of career management and without the perception from staff members that the conversation is really about when they are going to retire.

**Action:** Guidance and training packages should be available to ensure managing an age diverse workforce, supporting flexible working, career planning etc. are all normal parts of career and workforce management. Ideally, these should start from initial teacher training stage onwards and be covered in depth in leadership development programmes. In addition, performance management policies should be adapted to ensure these issues are integral in regular review conversations. There is also value in looking at whether these should in fact be separate career management conversations that sit alongside and are equally important as performance management conversations.

## **5. Greater promotion and implementation of flexible working across all schools to support a more inclusive age-diverse culture**

Teachers should have the opportunity to change their role, working pattern and/or working environment at any stage of their working life, as these types of flexible working arrangements are key to supporting those who wish to work beyond NPA.

Where teachers are able to change or reduce their working hours and level of responsibility, it enables them to, for example, manage care responsibilities and has a positive impact on their health and well-being. Some teachers in the latter stages of their careers may simply want to reduce their work commitments and achieve a better balance between work and home.

Flexible working opportunities have to be balanced against the needs of pupils and the school but it is possible to do that in a way that works for all. For example, timetabling should be matched to a flexible working policy which includes a range of creative working arrangements – including the ability to job-share at a senior level – to appeal to the varied needs of older staff.

As well as being more flexible, managers need to be creative in ensuring that all staff contribute to the school. For example, more mentoring and coaching roles by older staff members will benefit younger teachers as well as ensuring older members feel

(and are) valued. This could form a part of support for a strengthened QTS. Older staff may also have the experience to take on other roles if teaching time is reduced, such as managing school improvement projects.

The Department has produced guidance on flexible working at:

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/593990/DFE\\_Flex\\_Working\\_Guidance\\_2017\\_FINAL.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/593990/DFE_Flex_Working_Guidance_2017_FINAL.pdf)

**Action:** Further consideration of flexible working practices for teachers, the barriers, and how these can be addressed, with a view to:

- the Group commissioning work to assess the adequacy and impact of the existing guidance on flexible working
- developing guidance for managers in assessing how roles, working patterns and the working environment can be changed to accommodate more teachers working longer; and
- communications to encourage and develop flexible working patterns in schools so that flexible working is encouraged, becomes the norm, and is valued – for example, highlighting how schools have overcome the barriers and what benefits they have seen as a result retaining valuable, experienced talent.

**6. Ensure that the work of this group and their findings are fed into and inform the various programmes across the Department for example, those to promote flexible working and reduce teacher workload.**

**The issues involved in helping teachers to work longer include and are inextricably linked with issues associated with maintaining the health of the profession as a whole.**

**Action:** The Department and all group members must ensure that flexible working guidance, steps to address workload issues and other new initiatives take due account of the needs of a more age diverse workforce.

**7. Further Collection and Analysis of Data**

The Group is mindful that the evidence and initial conclusions are based on only those teachers who have chosen to work longer and therefore will need to continue to consider the data and review impacts as more teachers work until, or near to State Pension Age. Further data should also be collated over the coming years to monitor whether the current ill-health arrangements are appropriate to an older working population. The data will also inform Government's policy on whether the link between SPA and NPA continues to be appropriate to the teaching profession as time goes on.

Stakeholders will want to use this data and information to contribute to government reviews of the state pension age (SPA) and the link between NPA and SPA in public

sector schemes. The findings also need to be played into the Department's Teacher Workload project.

There is also a lack of comprehensive data on why teachers leave the workforce and this makes it more difficult to design policies and take measures to reduce the loss of talent from the profession. The Department will consider the work of this Group in future research.

**Action:** The Group should identify on an ongoing basis which data is available to:

- support and monitor delivery of the recommendations;
- continue to measure the impact of working longer; and
- understand why teachers leave the profession.

## 8. Continuation of the Working Longer Review

There needs to be a concerted effort by all parties to raise awareness around the fact that teachers will generally be working to older ages in future, as part of a national trend for longer lives. Teachers need to be supported in managing their health and careers appropriately. Schools need assistance in fostering a positive age-diverse culture that values all age groups, and recognises and gives opportunity to the skills and experiences that older teachers can contribute.

The actions suggested in this report will help provide the support that teachers and schools need, and it makes sense therefore for the review group to continue, both to monitor developments and support delivery. Within that, it should be recognised that there are gaps in evidence currently, for example, to help inform on whether the link between SPA and NPA continues to be appropriate, which need to be addressed and the review group will be ideally placed to assess how those gaps are being addressed and what actions are needed in light of the further evidence.

**Action:** The Group should continue as there is work to be done, and the Group will play a role in carrying out some of the recommendations, and monitoring the progress of others.

All parties to consider how awareness can be improved, for example, through communications that encourage teachers to plan ahead for retirement, that highlight success stories of teachers who choose to work beyond NPA currently, and what schools can do to support an ageing and multi-generational workforce.

## Appendix 1: Organisations represented on the steering group

The following organisations have representatives on the review's steering group:

- The Department for Education
- The Welsh Government
- Teacher trade unions:
  - Association of School and College Leaders (ASCL)
  - Association of Teachers and Lecturers (ATL) (from Sept 2017 – National Education Union ATL Section)
  - National Association of Head Teachers (NAHT)
  - National Association of Schoolmasters Union of Women Teachers (NASUWT)
  - National Union of Teachers (NUT) (from Sept 2017 – National Education Union NUT Section)
  - Undeb Cenedlaethol Athrawon Cymru (UCAC)
  - Voice
- Employer representatives:
  - The Local Government Association (LGA)
  - The Welsh Local Government Association (WLGA)
  - The National Governors' Association (NGA)
  - The Freedom and Autonomy for Schools National Association (FASNA)
  - United Learning
  - The Independent Schools Council (ISC)
  - The Girls' Day School Trust (GDST)
  - Sixth Form Colleges Association (SFCA)
- The Chartered Institute of Personnel and Development

## Appendix 2: Teachers' Pension Scheme

The Teachers' Pension Scheme (TPS) is a defined benefit contributory pension scheme for teachers employed by local authorities (including in foundation schools), academies, independent schools, sixth form colleges, FE colleges, and post-1992 universities. There are also other groups of 'teachers' who have access to the TPS, principally those employed by certain charities. The TPS is a statutory scheme, with the rules being set down in regulations made by the Secretary of State for Education, though those are subject to agreement by HM Treasury and the scheme is also governed by over-riding pension related legislation.

The TPS is the second largest occupational pension scheme in England and Wales (only the NHS scheme is bigger) with over 1.7 million members (active, deferred or pensioners).

In response to increasing longevity and rising costs, significant changes were made to the scheme arrangements from 2007, these included raising the age at which benefits are available in full (Normal Pension Age) to 65 for new entrants. However, in 2010, the Independent Public Service Pensions Commission (IPSPC), chaired by Lord Hutton, was set up to undertake an independent review of public service pensions. The IPSPC concluded that the 2007 reforms had not gone far enough and made recommendations about how such pensions can be made sustainable and affordable, while remaining fair to the workforce and the taxpayer.

Those recommendations ultimately led to the reformed arrangements that were introduced in April 2015. The key features of the reformed TPS include:

- benefits based on a career average basis (rather than final salary);
- Normal Pension Age in line with State Pension Age (rather than age 60/65);
- higher contribution rates for members (average of 9.6% of pay as opposed to 6.4% previously).

### Ill-health benefits

Ill-health benefits under the Teachers' Pension Scheme are paid to members who are no longer able to teach due to illness or injury and are likely to remain unable to teach up to their normal pension age. Scheme members choose whether and when they want to apply for ill-health retirement and provide evidence to support their application. The scheme administrator, Teachers' Pensions (TP), acting on behalf of the Secretary of State, considers this application with the benefit of expert medical advice; and determines if the individual meets the criteria to be awarded ill-health benefits. There are two levels of potential ill-health award: early access to accrued pension benefits for those deemed incapable of teaching - in the broadest sense of the term - but capable of other work; and an additional enhancement of accrued benefits for those deemed incapable of any form of remunerative work.

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