

Teachers Working Longer Review Project Initiation Document

February 2016

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Overview

In October 2014, a review began into the health and deployment implications of teachers working longer as a result of the normal pension age increase. This is a tripartite review involving the Department for Education, unions and employers.

This document sets out the principles, risks, dependencies and proposed approach that govern this project.

Project Principles

The agreed project principles for the Working Longer Review are intended to provide a blueprint and a reference point for the successful delivery of the project. The project principles are:

	Project Principle	Rationale/Description
1	Notes of meetings and progress of the review should be published regularly.	A group page will be developed on GOV.UK and will be updated regularly by the secretariat.
2	Specific principles should be adopted for data gathering.	<p>The principles of data gathering should be that:</p> <ul style="list-style-type: none">• Everyone can feed in;• Commissions should be agreed as a group;• The group should apply a QA approach to ensure consistence of data and to try to limit bias;• Decisions should be made over the level of detail published; and• Evidence should be quantifiable and able to stand up to scrutiny.

Risks

The high level risks to the successful completion of the Working Longer Review are:

	Risks	Mitigations
1	Insufficient or inferior data could result in recommendations being flawed.	Identify available data from a wide number of sources and where gaps are identified; seek to address these by commissioning additional data. Ensure data received is robust.
2	Poorly researched or considered modelling of likely future events could lead to inappropriate, misguided or unnecessary recommendations.	Employ effective research analysts to support the review and involve the steering and sub groups in the process.
3	Limited engagement by all or some members of the steering and sub groups could result in insufficient data and poorly researched recommendations.	The importance of all members' participation was set out at the start of the review and is regularly reiterated. To date all group members have been fully engaged and involved in the Review, including in considering the research approach and modelling methodology.

Dependencies

The high level dependencies identified as required to be fulfilled for the successful completion of the Working Longer Review are:

	Reform Implementation Project - Dependencies
1	Effective and regular attendance at steering and sub group meetings by all members.
2	Effective discharge of allocated project role by steering and sub group members, secretariat and work stream leads.
3	Timely approval of data commissions by both the steering group and the DfE.
4	Timely approval and release of funds by DfE in relation to project costs.
5	Timely transfer of information and/or directions between steering and sub groups. ¹
6	Effective and timely transfer of information from DfE, Capita, OHAssist and other commissioned suppliers.

¹ From December 2015 the Review decided to combine the steering and sub-groups and it has been agreed that this approach will continue for the remainder of the Review. This, therefore, eliminates this dependency.

Proposed Approach

Outline Approach	<ul style="list-style-type: none"> • Review and agree project documentation and approach; • Steering group to regularly review the work of sub-groups and monitor their progress; • Review available evidence; • Issue a call for evidence; • Review and analyse all evidence collected and identify any gaps in evidence; • Provide an interim report a year into the review; • Identify and commission potential sources of evidence to cover gaps; • Identify key issues and potentially mitigating employment practices; and • Using the findings, make recommendations to the Secretary of State.
Key Deliverables	<p>Data portfolio including list of any studies used.</p> <p>Interim Report.</p> <p>Final Report.</p>
Indicative Milestones	<p>Commission Rapid Evidence Assessments: January 2015</p> <p>Issue stage 1 call for evidence: February 2015</p> <p>Issue stage 2 call for evidence: September 2015</p> <p>Provide final data portfolio: December 2015</p> <p>Interim report issued: February 2016</p> <p>Complete gap analysis and commission additional evidence: February 2016</p> <p>Draft final report prepared: June 2016</p> <p>Final report sent to Secretary of State: September 2016</p> <p>Review Secretary of State's response to final report: October 2016</p>
Project Leads	Stephen Baker, Jeff Rogerson, Michelle Thompson-Smith
Resources required from	School Employment Division, DfE; Policy and Technical Team in Teachers' Pensions; Steering Group; Evidence of impact of working longer sub group; Employment practice sub group; Commissioned research organisations; and Teachers Analysis Unit, DfE.