Annex 3: Sub group remits
Impact of Working Longer sub group

The Impact of Working Longer group is one of two sub groups of the NHS Working Longer Review steering group. The group included representation from NHS Employers, Trade Unions and the Health Departments. Expert advice was called upon as required. The group met on a monthly basis and had joint chairs.

Remit of the group
The group was established to consider the following objectives1 from the NHSPFA:

- Gather and examine current and emerging quantitative evidence to assess and determine the physical, psychological and emotional impact on the whole workforce working longer and to state pension age.
- Analyse any impact and/or risks this may then have on the delivery of healthcare in terms of the staff, patients and employers. This evidence should make comparison with UK-wide population data and sector specific data.
- Identify any categories of worker or services for whom an increase in Normal Pension Age (NPA) would be a particular challenge in respect of safe and effective service delivery.
- Identify any categories of worker for whom an increase in NPA would be a particular challenge in terms of their health and wellbeing.
- Highlight any equal pay/equality issues arising from the new NHS Pension Scheme.
- Examine the potential impact of an older workforce on ill-health retirement, NHS Pension Scheme costs and sustainability.

In order to fulfil these requirements, the group examined specific quantitative information from a range of sources, which included the NHS Electronic Staff Record (ESR), workforce specific data from the devolved countries and the NHS Pension Scheme. In addition, further analysis was undertaken by relevant organisations including the Government Actuary's Department and the NHS Health and Social Care Information Centre.

The NHS does not now have the older workforce it will have in the future. As a result and given the lack of quantitative information currently available, the group was required to use existing information to project and predict future trends and scenarios. The group found that because many of the sources of data were not designed for the specific purpose of this review, it was not always possible to find the answers it sought.

Data portfolio
The group led on the collection and analysis of data from a range of sources. The group established a set of questions seeking data on areas including sickness absence, ill health retirements, injury benefit and the numbers of staff who have accessed NHS Pension Scheme flexibilities. This information was sought by the protected characteristics which include occupation, age, gender and race. The data portfolio summarises the questions set by this group and the conclusions which could be drawn. The full data portfolio can be found in Annex C. The data was

1 Impact of Working Longer sub group terms of reference
sought from a number of sources who collect this information for their own purposes and therefore it was not always possible to draw robust conclusions.

Terms of Reference

**Working Longer Review Sub Group – Evidence of the impact of working longer**

Introduction
1. The steering group is a tripartite partnership review group between national recognised NHS Trade Unions, NHS Employers and Health Department representatives. The group will report directly to the NHS Pension Scheme Governance Group and the NHS Staff Council and its Executive. The Evidence of the impact of working longer sub group reports directly to the steering group. The terms of reference are made from Annex C of the NHS Pension Scheme Proposed Final Agreement, please see this document for more detailed information.

Remit
2. In order to fulfil the requirements of the objectives outlined below, the group is required to examine specific quantitative information from a range of sources including both the:

- NHS Electronic Staff Record
- NHS Pension Scheme

In addition to this further quantitative analysis will be done by selected relevant organisations potentially including:

- Government Actuaries Department
- NHS Information Centre
- Centre for Workforce Intelligence

Due to the lack of quantitative information existing currently as the workforce does not have the same older workforce as will increase in the future, the group is required to use existing quantitative information to predict future trends and scenarios.

Objectives
3. The group is required to consider the following objectives:
   a. Gather and examine current and emerging quantitative evidence to assess and determine the physical, psychological and emotional impact on the whole workforce working longer and to State Pension Age.

   b. Analyse any impact and/or risks this may then have on the delivery of healthcare in terms of the:
      - patients
      - employers.
This evidence should make comparison with UK wide population data and sector specific data.

c. Identify any categories of worker or services for whom an increase in Normal Pension Age would be a particular challenge in respect of safe and effective service delivery.

d. Identify any categories of worker for whom an increase in Normal Pension Age would be a particular challenge in respect of their health and wellbeing.

e. Highlight any equal pay/equality issues arising from the new NHS Pension Scheme.

f. Examine the potential impact of an older workforce on ill-health retirement, NHS Pension Scheme costs and sustainability.

The sub group has the remit to commission specific work to existing reward and NHS Pension Scheme working groups detailed below:

- Joint Total Reward Group
- NHS Pension Scheme Governance Group.

Outcomes
4. The sub group will be required to report its findings to the Working Longer Steering Group. The Steering Group will then use these findings as part of the ‘Good Employment Practice’ sub group that will make recommendations to mitigate the impact on staff, patients the service and the employer.

Membership
5. The group will include trade union representatives and employer representatives. English and Welsh Health departments will also be represented as sponsors. Expertise from relevant bodies will be called upon as required.

6. The project management and secretariat for the group will be provided by the NHS Employers organisation and it will report directly to the NHS Pension Scheme Governance Group and the NHS Staff Council and its Executive.

7. Observers from the Scottish and Northern Ireland Government, employers and trade unions are welcome to attend. Review of membership will take place, if appropriate, depending on their local progress on pension discussions.

Ways of working
8. The group will initially meet monthly, commencing in November 2012.
9. As project management support, NHS Employers must ensure that the Steering Group and Sub Groups are fully briefed and updated regularly on
progress. As potentially different representatives sit on different groups, it is essential to ensure everyone is up to date on progress.

Communications
10. The group recognises that this work will be subject to immense scrutiny. Each meeting will seek to identify key communication points to help facilitate our work and the dissemination of information. We will work in a transparent way and seek to engage both employers and staff during our project.

Timetable
11. The project is expected to conclude within a year subject to the research which will be essential to inform the review.

Employment Practice sub group
The Employment Practice group is the second sub group of the NHS Working Longer Review steering group. Once again the group included representation from NHS Employers, Trade Unions and the Health Departments. Expert advice was called upon as required. The group met on a monthly basis and also had joint chairs.

Remit of the group
The group was established to consider the following objectives\(^2\) from the NHSPFA:

- Consider what strategies employers will need to put in place to support the extension of working lives, flexibility and choices in retirement. This would include health and well being initiatives and developing new career pathways for staff.
- Identify incentives for positive employer practices and behaviours which support the implementation of the strategies recommended as part of objective A.
- Determine the scope of existing NHS Pension Scheme design flexibilities to support staff working to state retirement age, including flexible retirement and retirement choices.
- Explore the option for employer and employee-funded contribution rates to offset the cost of early retirement for any potential staff groups identified as suffering detriment from working longer.
- Consider links between scheme flexibilities and the concept of total reward in the NHS.

The focus for this sub group was on employment practice. That is, current workplace practices, examples of age-related good practice and also how employers should develop appropriate arrangements which recognise and address the changing workforce requirements going forward. It was agreed that it was important to identify and gather sound qualitative evidence. The sub-group also considered the evidence which was collected through the Impact of Working Longer sub group. This included relevant employment strategies to support extended working lives, flexibility and

\(^2\) Employment Practice sub group terms of reference
retirement choices applicable to NHS organisations and other best practice evidence. The group oversaw the development of the national call for evidence.

Call for evidence
The national call for evidence which ran from 24 June until 5 September 2013. The purpose of this exercise was to identify issues that may make working to a higher retirement age more difficult, and to capture examples of good practice that enable staff to continue working. The group commissioned researchers at Newcastle University to undertake the analysis of responses. The interim findings report can be found in Annex 7.

The call for evidence wanted to seek evidence from NHS organisations, trade unions, NHS employees and interested stakeholders to identify examples of good practice that enable staff to continue working. There are many examples of imaginative and innovative policies being put into practice on a local level that are not widely known about but could be used within other NHS organisations. It was also vital that we heard about any issues or barriers that may make working to a higher pension age more difficult.

Terms of Reference

Working Longer Review Sub Group – Employment Practice

Introduction
1. The steering group is a tripartite partnership review group between national recognised NHS Trade Unions, NHS employers and health department representatives. The steering group will report directly to the NHS Pension Scheme Governance Group and the NHS Staff Council and its Executive.

2. The Evidence of the impact of working longer sub group reports directly to the steering group. The terms of reference are made from Annex C of the NHS Pension Scheme Proposed Final Agreement, please see this document for more detailed information.

Remit
3. Using the findings of the Evidence of working longer sub group, in order to fulfil the requirements of the objectives outlined below, further qualitative evidence should be used from a wide and robust range of sources.

In addition to this further research can be commissioned to support the achievement of the objectives below.

Objectives
4. The group is required to consider the following areas:
   a. Consider what strategies employers will need to put in place to support the extension of working lives, flexibility and choices in retirement. This would include health and wellbeing initiatives and developing new career pathways for staff.
b. Identify incentives for positive employer practices and behaviours which support the implementation of the strategies recommended as part of objective A.

c. Determine the scope of existing NHS Pension Scheme design flexibilities to support staff working to state retirement age, including flexible retirement and retirement choices.

d. Explore the option for employer and employee-funded contribution rates to offset the cost of early retirement for any potential staff groups identified as suffering detriment from working longer.

e. Consider links between scheme flexibilities and the concept of total reward in the NHS.

The sub group has the remit to commission specific work to existing reward and NHS Pension Scheme working groups detailed below:

- Joint Total Reward Group.
- NHS Pension Scheme Governance Group.
- Partnership in Occupational Safety in Health and Healthcare (sub group of the NHS Staff Council).

**Outcomes**

5. The sub group will be required to make any recommendations to the Working Longer Steering Group. The Steering Group will then be asked to ratify the sub groups recommendations before seeking endorsement of final recommendations from the NHS Pension Scheme Governance Group and ultimately the NHS Staff Council.

**Outputs - Required recommendations**

6. The main outputs that are required from the group are a series of recommendations to support the objectives that are based on robust evidence collected by:

   a. call for evidence
   b. primary research
   c. evidence collected through the Steering Group/Evidence of the Impact of Working Longer Sub Group.

These recommendations are detailed below and split between employment practice and the NHS Pension Scheme:

**Employment practice**

Relevant employment strategies to support extended working lives, flexibility and retirement choices that are applicable to NHS organisations, supported by best practice evidence.

Business case for implementing above recommended employment strategies that includes:
o hypothetical cost implications.
o the impact on the delivery of services.
o levels of staff engagement.

**NHS Pension Scheme**
o Recommendations for application of existing pension flexibilities and how these should be re-launched into the service.
o Recommendations for how the employer or employee funded early retirement should be applied.
o Impact of the above recommendations on the total reward package.

Outline recommendations are required to be presented to the Steering Group by 11 September 2013.

Final recommendations are required to be presented to the Steering Group by 21 November 2013.

**Membership**

7. The sub group will include trade union representatives and employer representatives. English and Welsh Health departments will also be represented as sponsors. Expertise from relevant bodies will be called upon as required.
8. The project management and secretariat for the group will be provided by the NHS Employers organisation and it will report directly to the NHS Pension Scheme Governance Group and the NHS Staff Council and its Executive.
9. Observers from the Scottish and Northern Ireland Government, employers and trade unions are welcome to attend. Review of membership will take place, if appropriate, depending on their local progress on pension discussions.
10. Due to employers committing time outside of their substantive roles, should an employer rep be unable to attend they are able to nominate a deputy to attend in their absence provided they are fully briefed prior to the meeting.

**Ways of working**

11. The group will initially meet monthly, commencing in January 2013.
12. As project management support, NHS Employers must ensure that the Steering Group and Sub Groups are fully briefed and updated regularly on progress. As potentially different representatives sit on different groups, it is essential to ensure everyone is up to date on progress.

**Communications**

13. The group recognises that this work will be subject to immense scrutiny. Each meeting will seek to identify key communication points to help facilitate our work and the dissemination of information. We will work in a transparent way and seek to engage both employers and staff during our project.

**Timetable**

14. The project is expected to conclude within a year subject to the research which will be essential to inform the review.