



NHS Employers

Part of the NHS Confederation

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**IMPROVING NURSE
RETENTION:
FLEXIBLE
RETIREMENT**

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INTRODUCTION

This guide focuses on flexible working through the lens of supporting nurses who are approaching/considering retirement to access more flexible forms of retirement. The guide outlines the benefits of flexible retirement, the basic principles and what it can look like in practice.

We know there are many great examples from across the NHS of employers supporting their nurses to access flexible retirement. This resource is intended to collate this information into a user-friendly and accessible format, highlighting top tips and examples of how trusts have used flexible retirement to support better retention of the nursing workforce.

This guide is aimed at colleagues that have a responsibility or interest in implementing flexible working, including HR professionals, line managers and nurse leaders, and has been written to support you to review and refine your existing activity in this area.

Prior to the COVID-19 pandemic, there was clear recognition that significant staffing shortages in nursing required urgent action and this remains a reality. Interventions to better retain our existing nurses hold huge potential to contribute to increased nurse numbers. Improving opportunities for nurses to work flexibly is an important aspect of shaping an attractive and modern employment culture and has the potential to improve retention of this important staff group.

While the focus of this guide is tailored to the nursing workforce, improving access to flexible retirement for all staff groups is important in making the NHS an attractive place to work and many of the principles outlined in this guide can be applied to different sections of the workforce.

This guide forms part of a suite of NHS Employers' resources on flexible working, all of which can be accessed through our [flexible working hub](#).

STRATEGIC CONTEXT

Offering flexible retirement is one of the ways you can attract and retain a diverse nursing workforce across a range of settings.

The government has pledged to have 50,000 more nurses working across the NHS by 2024/25 and the [We are the NHS: People Plan for 2020/2021 – action for us all](#) sets out the steps needed to achieve this, through a combination of:

- ✓ increasing undergraduate supply
- ✓ developing additional entry routes into the profession
- ✓ supporting more nurses to return to practice
- ✓ improving retention of our existing nursing workforce.

Improving nurse retention is seen as the most immediate and cost-effective action that can be taken to grow nurse numbers.

Throughout the response to COVID-19, NHS organisations have demonstrated enormous capacity to adapt and work in innovative ways to deliver high-quality patient care during the most challenging of circumstances. Our NHS staff have shown huge flexibility in how, when and where they work and, to ensure the NHS remains an employer of choice, there is a reinforced need for continued action in embracing new and flexible forms of work.

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AN AGEING NURSING WORKFORCE

As highlighted in the National Audit Office report, [The NHS Nursing Workforce](#), the nursing workforce as a whole is getting older, meaning that a higher proportion of nurses are closer to retirement age.

Modelling from Health Education England forecasts that approximately 41,000 nurses, or 13 per cent of the workforce, will retire between 2018 and 2024. Given these large numbers, and the importance of retaining nurses in the system, it is crucial that employers fully understand the needs and preferences of older nurses and look at how flexible retirement can be used to accommodate these.

From a talent management perspective, the ageing nursing workforce also means that the NHS must think seriously about the demographics of its future workforce and ensure that we make the most of the skills and expertise that all ages bring.

Much of the nursing workforce will have been placed under immense pressure in managing the response to COVID-19. The potential exists that this could signal an increase in the desire of those nurses nearing the end of their careers to bring forward their retirement plans and it is important to consider how increased access to flexible retirement could be used to mitigate this risk. Conversely, there are many nurses who had previously retired from NHS service that registered an interest in returning to work to support the response to the pandemic. It is helpful to assess how continued access to more flexible forms of employment could help retain some of these individuals.

ABOUT FLEXIBLE RETIREMENT

Flexible retirement is defined as flexibility regarding the age at which an employee retires, the length of time an employee takes to retire, or the nature or pattern of work in the lead-up to retirement. The [NHS Pension Scheme](#) offers a range of flexibilities to support both staff and employers.

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UNDERSTANDING THE OPTIONS

There are a variety of different options that employers can use to support flexible retirement for nurses. A summary of these options is included in the table below and more detailed guidance is available on this [factsheet](#).

Step down	Staff can step down to a different role and reduce their level of responsibility while remaining in NHS employment.
Wind down	Staff can wind down to retirement by remaining in their current post but reduce the number of hours or days they work.
Retire and return	Staff can request to retire, claim their pension benefits, and then return to NHS employment. The Department of Health and Social Care has released guidance to help employers put policies in place to consider applications from staff.
Draw down	Staff can take part of their pension benefits and continue in NHS employment.
Late retirement enhancement	Staff can retire later than their normal pension age and have their pension benefits increased.
Early retirement reduction buy out	Staff or employers can pay additional contributions to buy out the reduction applied to the member's pension if they retire before their normal pension age.

When thinking about how best to retain nurses, it is important to consider the wide range of options available, and the different types of roles and functions where our older and more experienced nursing workforce could add value. Many employers report that nurses approaching retirement are often looking for a change of pace or focus, rather than looking to retire completely.

There are good examples across the NHS of how older nurses have taken on mentoring responsibilities for newly qualified staff, with positive retention outcomes for both sides. Those entering the profession feel more supported and those approaching the end of their working lives take pride in being able to share their wealth of experience with the next generation of nurses.

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Barking, Havering and Redbridge University Hospitals NHS Trust introduced a senior intern scheme. The scheme was designed to have a dual focus of improving levels of pastoral support to reduce the number of newly qualified nurses leaving the trust, while simultaneously providing experienced nurses with a new and rewarding element to their role.

In 2017, 24 per cent of newly qualified nurses left in their first year. Within two years, the scheme had helped to almost triple the trust's intake of new nurses and reduced the dropout rate of newly qualified nurses to eight per cent. Feedback from the more experienced nurses involved in the scheme was also very positive.

The scheme was featured in a BBC documentary, *Saving our Nurses*, all episodes of which are available to stream on [BBC iPlayer](#).

The programme highlights the support the trust gave to newly qualified nurses, midwives, and allied health professionals, helping to keep them in the NHS. The programme explores the relationship between young nurses and their more experienced mentors, who provide emotional support on tough days, listen to concerns, and give the newly qualified recruits alternative options to encourage them to stay in the trust.

Having access to work flexible or reduced hours is frequently cited by older nurses as having a major influence on decisions to return to, or remain in, employment. Furthermore, it is important to acknowledge any feelings of burn-out that may be reported among older workers and consider whether these could be addressed through transfers to different wards or departments, or by stepping back from clinical duties and into more administrative-focused roles.

Southend University Hospital NHS Foundation Trust has produced a handy guide for staff and managers, designed to answer questions regarding retirement. The guide, available through [NHS England and NHS Improvement's website](#), provides advice on how to make the retirement process as easy as possible, and also suggests alternatives to retiring completely.

[NHS Employers' flexible retirement hub](#) signposts to various tools, resources and shared learning to provide practical guidance on how you can make the most of flexible retirement options to benefit your organisation and your staff.

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BENEFITS OF FLEXIBLE RETIREMENT

When building a business case for offering increased opportunities for nurses to retire flexibly, it is important to consider the many benefits for both staff and the organisation.

BENEFITS

FOR STAFF

- ✓ Higher levels of engagement
- ✓ Improved job satisfaction
- ✓ Improved health and well-being
- ✓ Better work-life balance
- ✓ Support to manage caring responsibilities

FOR EMPLOYERS

- ✓ Improves employer brand
- ✓ Improved diversity of the workforce
- ✓ Loyal and committed employees
- ✓ Supports with succession planning
- ✓ Retaining skilled and experienced employees

An appreciation of the benefits of flexible retirement for both nurses and employers is a useful starting point for building a credible business case. To help you build your business case further, **you may also wish to consider some of the following:**

- **What is your workforce data telling you?** Data from your electronic staff record (ESR), NHS Staff Survey and nursing turnover and vacancy rates should be examined alongside qualitative data sources obtained through engaging with your nursing workforce to seek their views. This [age profiling tool](#), developed by the Working Longer Group, is an interactive resource that allows you to take a clearer look at the age of your workforce now and in the future, at an organisational, departmental or team level. Using the tool can help you predict trends and identify areas where there may be a higher likelihood of retirement requests in the future.
- **Add a human element** and capture stories that highlight the benefits of flexible retirement for individuals, teams, and departments.

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Leeds Community Healthcare NHS Trust established clear retire and return options for clinical staff (including flexible working opportunities to retain talent), with a focus on nurses aged over 50.

The trust reviewed the number of retire and return employees and captured the working arrangements they had in place.

- **How could flexible retirement complement succession plans?**
- **What is the role of systems** and how can you work in collaboration, across organisational boundaries towards the accomplishment of common goals in improving flexible retirement opportunities for the nursing workforce?
- **Think about the bigger picture** and reflect on the strategic priorities for the service both in the immediate and longer term. How can flexible retirement be used in support of these?

Once you have developed your business case, securing buy-in at senior leadership level is essential for successful implementation and rollout. You can read more about [engaging your board and building a business case](#) on our health and wellbeing pages.

ATTITUDES TO RETIREMENT

Increases in life expectancy and removal of the default retirement age have both meant that attitudes towards retirement are changing and continue to evolve across the generations. This is especially true for the NHS nursing workforce (and indeed the NHS workforce as a whole), following the introduction of the 2015 NHS Pension Scheme, which saw the normal pension age set the same as the state pension age. This change meant that the majority of nurses are now only able to access their full NHS Pension after the age of 65, whereas previously they had been able to draw down benefits earlier.

The [Working Longer Group](#) was established to review the implications of NHS staff working to a later, raised retirement age and produced a number of useful [tools and resources](#) to assist employers in this area.

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ENABLERS TO FLEXIBLE RETIREMENT

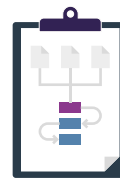
There are a number of enablers for employers to consider in successfully embedding flexible working practices for the nursing workforce.



1. Culture and leadership



2. Staff engagement



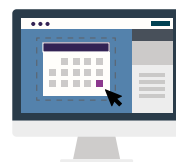
3. Policy and process



4. Supportive line management



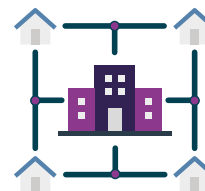
5. Job design



6. Technology



7. Communication



8. Systems working



9. Evaluation

NHS Employers' guide, [How to embed flexible working for nurses](#), contains further information to consider in relation to each of these nine enablers, that can be used to review and refine your organisational approach to improving uptake of flexible retirement for your nursing workforce.

While it is useful to consider how flexible retirement features as part of a broader strategic approach to improving flexible working, listed below are a number of top tips to help you get started when thinking specifically about how to support nurses to retire flexibly, in a way that balances the needs of individuals with those of the service.

TOP TIPS

To help you get started when thinking specifically about how to support nurses to retire flexibly

1. CULTURE AND LEADERSHIP

2. STAFF ENGAGEMENT

3. POLICY AND PROCESS

4. SUPPORTIVE LINE MANAGEMENT

5. JOB DESIGN

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1. CULTURE AND LEADERSHIP



- ✓ Develop an organisational culture that values flexible retirement. By ensuring your approach to flexible retirement is inclusive, you will maximise the benefits to both your staff and the organisation.
- ✓ Senior leaders set the cultural tone of the organisation, so ensuring your leadership team's buy-in to the benefits of flexible retirement is essential.
- ✓ Scaling up flexible retirement for nurses requires a degree of organisational change. Bring your managers on board and equip them to have positive conversations around retirement and to understand the options available. It may be useful to link with your organisational development colleagues, take a look at our [DoOD web pages](#) for further ideas and support in this area.
- ✓ Be aware of any cultural biases within your organisation concerning older workers and retirement. Take steps to address these if necessary.

2. STAFF ENGAGEMENT



- ✓ Engage with your older nurses through a variety of channels to find out what matters most to them. Discussions that cover career/work, future aspirations, pensions arrangements and retirement plans are an essential part of the management relationship at all stages of the career lifecycle. Regular contact and discussion will help staff feel supported to make informed decisions.
- ✓ Have conversations about flexible retirement and the different options available as part of pensions roadshows and pre-retirement courses. Read [Chelsea and Westminster Hospital NHS Foundation Trust's blog](#) about how they promoted the value of the NHS Pension Scheme and raised awareness of the options available to staff for flexible retirement.

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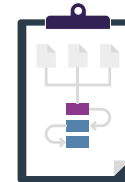
9. EVALUATION

Calderdale and Huddersfield NHS Foundation Trust introduced a pre-retirement course, which they ran every three months. The trust also contacts all retirees three months after they have left the organisation to see if they would be interested in returning. Retirees can return at their previous band and working hours.

The trust currently has around 150 nurses retiring each year, of which around a third return.

- ✓ Encourage partnership working with trade union colleagues at a local level to facilitate the sharing of ideas and best practice to enable a collective approach to supporting older workers and the improved roll out of flexible retirement.
- ✓ Regularly talk to your nurses who are using flexible retirement to see how it is working for them and what more you can do to support them.

3. POLICY AND PROCESS



- ✓ Age is one of the protected characteristics under the [Equality Act 2010](#), so it is essential that your organisational policy and processes do not discriminate on the basis of age. Access [NHS Employers' public sector equality duty guidance](#) to help you consider what steps you can take locally to ensure compliance with your obligations under the Equality Act 2010.
- ✓ Ensure your organisational policy and processes are up to date and clearly accessible to your nursing workforce. Include your policy in staff inductions and promote it on your intranet and in pension updates.
- ✓ Monitor all decision-making processes that are based on age, such as the allocation of flexible working and access to training and development opportunities.

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- ✓ When developing your flexible retirement policy, you may find it helpful to look at policies developed by other NHS organisations. These examples are freely accessible online:

[↗ University Hospitals Birmingham NHS Foundation Trust](#)

[↗ NHS Southern Health NHS Foundation Trust](#)

[↗ Doncaster and Bassetlaw Hospitals NHS Foundation Trust](#)

4. SUPPORTIVE LINE MANAGEMENT



- ✓ Provide training to support managers in developing positive age management approaches and equip them to deal effectively with flexible retirement requests. Our [↗ People Performance Management toolkit](#) provides practical advice and support to handle key management situations confidently and consistently.
- ✓ Consider whether the rollout of age awareness training could be of benefit to your managers and nursing teams.
- ✓ Ensure conversations about flexible retirement feature in key interactions between staff and line managers, including one to ones and appraisals.
- ✓ Encourage your managers to seek to understand the reasons behind nurses' flexible retirement requests and enable them to explore the various options available.

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University Hospitals of Derby and Burton NHS Trust developed a working longer project to support the ageing workforce. Outputs included:

- an annual Working for Longer Conference, designed based on staff feedback, with talks and workshops focused on menopause, stress, musculoskeletal issues, reasonable adjustments, flexible working and supporting managers to plan their future teams
- written information guides on topics such as menopause, carers commitments and deafness and hearing loss
- a series of menopause roadshows to help raise awareness of this issue

As a result of these interventions, there has been a significant increase in retire and return requests across the registered nursing workforce, from 38 per cent in 2017/18 to 53 per cent in 2018/19. This equates to 11 more registered nurses returning rather than retiring altogether. To find out more, read the [full case study](#).

5. JOB DESIGN



- ✓ Supporting nurses to work longer and retire flexibly may require changes to the work environment and creative approaches to job design.

United Lincolnshire Hospitals NHS Trust set up a project team to specifically address the needs of staff close to retirement. The trust created a scheme to look at retiring staff and the roles that they can come back to. The new role could be in the same ward/clinic or could be within a completely different area. The process was designed and implemented in April 2019 and sits within the nursing clinical education team. A tracker is used to monitor progress as well as report impact on periodic turnover data. Read more about this initiative in the full [case study on our website](#).

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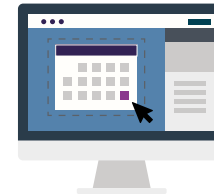
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- ✓ [Musculoskeletal disorders](#) and other long-term conditions often become more prevalent with age and consideration should be given to supporting the health and wellbeing of older nurses as part of an approach to flexible retirement.
- ✓ Older nurses often report feeling disadvantaged by managers who do not recognise their ongoing need for continuous personal development. Mitigate against this by ensuring managers continue to have conversations about learning and development and that these are appropriately tailored to the various stages of the career lifecycle.
- ✓ This [factsheet from the CIPD](#) explores the evolution and objectives of job design, the factors affecting it, and the different approaches to designing jobs.

6. TECHNOLOGY



- ✓ Technology can improve both rostering and the managing of a live rota and should be used wherever possible. You may find it helpful to review this [guidance from NHS England and Improvement](#) to support you in using e-rostering software to its fullest potential.
- ✓ Consider how approaches such as team-based rostering and self-rostering can be used to support flexible retirement.
- ✓ Age affects everyone differently, but organisations need to be aware of the potential consequences of nurses working longer. Use of technology in relation to flexible retirement should also consider appropriate ergonomic equipment, to take account of an ageing workforce and the cumulative effects of physical work demands.

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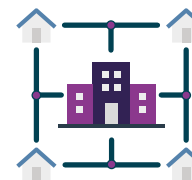
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- ✔ Promote flexible retirement to staff and managers to make sure the opportunities for retiring flexibly are well understood across your nursing workforce.
- ✔ With ambitions to grow nurse numbers, employers need to think creatively about how they can increase mentorship capacity across the existing workforce. Have conversations about how flexible retirement can assist with succession planning, whereby your more experienced nurses can help upskill and train the future workforce by becoming mentors or supervisors for trainees and in those in preceptorships.
- ✔ Share success stories, particularly for those in senior roles, to help demonstrate how flexible retirement can provide clear benefits for both staff and the organisation.
- ✔ In your communications with nurses about flexible working, take the opportunity to signpost to other health and wellbeing initiatives that comprise part of your overall reward offer. Think about including information on menopause and support for working carers. Take a look at our [health and wellbeing](#) and [supporting carers](#) web pages for more information. You may also find our [webinar on menopause in the workplace](#) helpful.

8. SYSTEMS WORKING



- ✔ Consider the impact of an ageing workforce in system-wide workforce planning, with the aim of developing a multidisciplinary and adaptive nursing workforce that can deliver care flexibly across primary, community and acute care.
- ✔ This [case study](#) from Healthier Lancashire and South Cumbria Integrated Care System details how a systems approach was taken to addressing the retention of staff across the region, including those approaching retirement, by increasing job opportunities and improving the mobility of the combined workforce.

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Mid and South Essex NHS Foundation Trust took a collaborative approach across three acute trusts, within its sustainability and transformation partnership. The trust ran focus groups which revealed that older nurses did not feel that their organisations wanted them back or to stay longer. They created a project group to help address this, which achieved several key outputs:

1. Retention breakfast club sessions for managers, providing skills, support, and advice for middle managers to manage flexible working, flexible retirement, and succession planning.
2. Development of simple retire and return guidelines for staff and managers, which answered frequently asked questions and promoted the benefits of the scheme.
3. A nursing internal transfer scheme, providing an opportunity for staff to move roles or job shadow.
4. Career workshops for staff who wanted to rethink how to use their current skills and experience to inform a career specialisation or change.
5. Pensions advice sessions tailored to nurses.
6. Creation of a nursing alumni group to harness relationships with the retired nurse population.

9. EVALUATION



- ✓ Consider trialling any new flexible retirement working arrangements for a few weeks or months to see if they will work for the staff member and the service before finalising.
- ✓ Regularly review flexible retirement arrangements in line with policy timeframes.
- ✓ Ensure that all policies are monitored and evaluated regularly so there is equity of access for all staff across all age ranges.

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FURTHER READING

This guide identifies a number of enablers to supporting older workers and increasing options for nurses to retire flexibly. When looked at together, they can improve opportunities for the nursing workforce to access shift patterns and roles that allow them to achieve a better work-life balance and remain working in the NHS for longer.

For further inspiration about flexible retirement and to help shape your organisation's strategy, the following links offer various sources of information that you may find helpful.



NHS England and NHS Improvement has produced a [collection of resources](#), including a number of case studies, to help your organisation develop and implement flexible working to improve staff retention.



The [CIPD's website](#) provides guidance and resources to help you embed flexible working in your organisation.



The Twitter account [@FlexNHS](#) is a support and resource network that has been set up to promote and enable flexible working in the NHS for every profession, role and grade.



The Royal College of Nursing has created a [10-step action plan](#) to help you support older nurses in the workplace.



NHS Employers is the voice of employers in the NHS, supporting them to put patients first.

We actively seek the views of employers on key workforce issues and use our expertise to support them to develop a sustainable workforce, improve staff experience and provide high quality care to patients. We influence workforce policy at regional, national and European levels and turn policies into practical workable solutions.

NHS Employers is part of the NHS Confederation.

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