

Teachers working longer review: final report

Introduction and background

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). The steering group was made up of employers, unions and the Department for Education and these organisations nominated representatives to form the longer working review group. The aims of the group were: to explore the 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.

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 included in the research. There was a particular focus on teachers who are likely to work longer because their NPA changed as a result of reforms introduced by Public Service Pensions Act 2013, and on those who commenced teaching since. Evidence was mainly gathered from a call for evidence launched in September 2015. In response to the call, 18 documents were submitted and 122 respondents answered the additional questions. The group also carried out 2 Rapid Evidence Assessments (REAs) to explore existing research.

Key points

Impact of the ageing process on roles

- Evidence gathered suggests that the key cognitive skills needed for teaching do not deteriorate significantly before age 70. Furthermore, the age of teachers does not have a noticeable effect on student performance.
- Qualitative research 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.
- The "Teachers and ill-health retirement" report 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.
- Evidence shows that whilst older teachers appear more likely to report health issues linked with their job, particularly musculoskeletal and other physical issues, they also report less stress than less experienced teachers.

Applications for ill-health retirement

- The rate of ill-health retirements has remained constant over recent years. It was previously significantly higher, until changes were made to the incapacity criteria, application process and benefit structure to ensure these benefits are better targeted to need. Current rates are consistent with other workforces.
- 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.

- The evidence from the group's commissioned report regarding ill-health retirements 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.
- In the population as a whole, mental health conditions are more likely to be identified in women. However, a larger proportion of men than women (26% vs 17%) retire from teaching early because of mental health issues.
- Other significant causes of early retirement are cancer (23%) and diseases of the nervous system (19%).

Availability and quality of occupational health support and ill health provisions

- Evidence suggests that the level of support for teachers varies. In most cases, interventions do not take place until the teacher's illness is advanced and retirement is being considered.
- Qualitative evidence suggests that headteachers and senior leaders place value on occupational health and help with working patterns. However, evidence from REAs and anecdotal evidence from group members suggests that such support is not consistently available.
- Evidence showed that general awareness of pension provision and employment options under the TPS is poor; some are confused about their entitlement and where they should go for advice and information. 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.

Career pathways and employment practices which could support working longer

- When considering changes in career pathway, members of a leadership team have more options than classroom teachers. They may, for example, work as local authority advisers or across a number of schools in multi-academy trusts.
- Evidence suggests that the most popular option is for teachers to reduce their hours or their responsibility – for example, leaving their management role but continuing to teach. There are also specific examples of primary school teachers moving to teaching older year groups so that the physical demands are reduced; and of older staff moving into specialist support roles or into new non-teaching roles, such as school librarian.
- 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.
- In primary and secondary schools in Horsens, Denmark, a compulsory conversation takes place with teachers when they reach the age of 50. Managers discuss their career plans and how their conditions for working longer might be accommodated. Managers identify special roles for older teachers which use their experience, such as mentoring newer teachers and leading projects. Flexible conditions (hours, duties) and training (such as in digital teaching and learning) have been introduced. This project increased the number of teachers working after the age of 60 by 50% in 5 years.

Reasons why older teachers leave or remain in the workforce

- Teachers identified reduced energy levels/increased physical limitations and workload pressures as the two main barriers to working beyond NPA. Work-life balance concerns are seen as a significant issue during mid and late career phases in particular. ‘Pull’ factors also influence the decision to leave early. These include family issues and the desire to pursue hobbies or travel plans.
- Some cited a perceived lack of support by managers as well as the culture within the school towards older teachers and a perceived lack of flexible working as key factors.
- The three main motivations for teachers to continue working beyond NPA are: wanting or needing to maintain an income, perhaps because of funding children through university or having had earlier career breaks; continuing to get job satisfaction and feel mentally stimulated; and maintaining an active social life and helping young people to develop.

Understanding of TPS flexibilities

- The limited evidence available suggests that understanding of the options within the TPS remains low. Many teachers and senior leaders referred to how confusing pension and retirement information can be, and that it was too generic to be useful to individuals. There was little awareness of the available options. It is therefore not surprising that the take-up of phased retirement has been low, in spite of the fact that it is an attractive option for many.
- 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.

Recommendations

- Evidence clearly shows that age is no barrier to a teacher’s ability to provide effective outcomes for children and young people. There is also evidence that older teachers add to the overall educational environment through extending the range of experiences, perspectives and knowledge which students can draw upon. The Department should 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.
- 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. To this end, the TPS should consider: improving the online portal, adding simple factsheets and more personalised account information; working with employers to consider the best ways of communicating with teachers; providing those joining initial teacher training (ITT) with access to information about pensions as part of career management training.
- There will be new challenges involved in maintaining physical, mental and emotional health and wellbeing as more teachers work into their sixties. There needs to be further research and dissemination of good practice in a number of areas such as: good occupational health support; training for managers to support employees’ wellbeing; and examples of successful job redesign or redeployment. The DfE should also establish links with the current work on strengthening QTS and improving teacher career progression and teacher retention work to include older workers.
- The DfE must consider whether the current ill health provisions need to be modified to accommodate teachers working into their sixties.
- Guidance and training packages should be available to ensure that managing an age diverse workforce, supporting flexible working, career planning etc. are all integral parts of career and workforce management. This guidance and training should be covered in depth in leadership development programmes. Performance management policies should be adapted to ensure these issues are either included in regular review conversations or discussed in separate career management conversations.
- Flexible working arrangements are key to supporting those who wish to work beyond NPA. The review group should develop guidance for managers in assessing how roles, working patterns and the working environment can be changed to accommodate more teachers working longer.
- 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.
- The Group recognises that the evidence to date is based solely on teachers who have chosen to work longer. It 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 full document can be downloaded from:

<https://www.gov.uk/government/publications/teachers-working-longer-review-final-report>