

# Inclusivity through flexibility

How flexible  
working can  
support a thriving,  
age-inclusive  
workplace

[ageing-better.org.uk](https://ageing-better.org.uk)

Report on the findings of an employer-based intervention programme, by:

# About us

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## Centre for Ageing Better

The UK's population is undergoing a massive age shift. In less than 20 years, one in four people will be over 65.

The fact that many of us are living longer is a great achievement. But unless radical action is taken by government, business and others in society, millions of us risk missing out on enjoying those extra years.

At the Centre for Ageing Better we want everyone to enjoy later life. We create change in policy and practice informed by evidence and work with partners across England to improve employment, housing, health and communities.

We are a charitable foundation, funded by The National Lottery Community Fund, and part of the government's What Works Network.

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## Timewise

Timewise is the UK's leading flexible working consultancy specialising in flexibility as a positive talent strategy. Timewise delivers consultancy services to help employers attract, retain and develop the best talent through flexible working solutions.

Timewise was founded by Karen Mattison and Emma Stewart, to tackle the lack of quality part-time jobs and drive the flexible conversation forwards.

Today, the Timewise team are well-known as thought leaders and innovators, called upon by policymakers and businesses to shape flexible working policy and practice.

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# Foreword

Over the past decade we have seen an unparalleled increase in both the number and proportion of older workers contributing to the UK economy<sup>1</sup>. With increases to the state pension age, fewer young people entering the labour market, and changing attitudes to working longer, employers have seen a huge change to the age structure of their workforce. Around one in three workers are over the age of 50, and that proportion is set to rise.

Never before have we had so many workers, with so many years of experience, apply their skills within such an age-diverse workforce. Employers who can maximise the benefits of multi-generational workforces will be the leaders of the next decade – maximising the knowledge, skills, and talents of all ages.

We know that flexible working is an essential part of being an age-friendly employer. According to people over the age of 50, flexible working is the number one workplace practice that would allow them to work for longer<sup>2</sup>. Those in mid-life and approaching later life want different things from work. Priorities, needs and motivations may change. Flexibility can enable people to progress at work and balance work with other parts of life. Despite these benefits, flexible working is still not universally accepted or promoted.

The Centre for Ageing Better teamed up with Timewise and several leading employers to find out how to make flexibility for people aged 50 and over work in practice so that others can learn from it. We also commissioned an evaluation of the pilot work which we will publish in the near future.

At the time of writing we experienced a seismic change in the UK's working practices as a result of COVID-19 – a move to remote and flexible working by default for many, and adaptations to the workplace and job redesign for many others. The longer-term impacts are still unfolding, but an increase in demand for and uptake of flexible working is likely to be an enduring legacy. For many people and organisations, workplaces will never go back to how things were. To help all of us to prepare today for our longer lives and help employers to secure the talents of a diverse workforce, flexibility must become part of the new normal.

**Anna Dixon**

Chief Executive, Centre for Ageing Better

<sup>1</sup> There were 2.4 million more workers over the age of 50 in 2019 between 2010 and 2019. An increase in the employment rate from 64.7% to 72.3% among 50-64-year-olds. Annual Population Survey.

<sup>2</sup> Attitudes of over 50s to Fuller Working Lives (Yougov survey for DWP, 2015)

# Introduction



## The changing workforce and workplace

**To study, to work, to retire – a life model in three stages, created in the second half of the twentieth century in the UK and other developed countries. Based on economic growth, fixed-skills employment, a young population and an expected life span of 70-80 years, it worked well for decades.**

But it's been disrupted now – globalisation, Artificial Intelligence (AI), the gig economy, an ageing population and increased life span have all changed how we now live and work. The COVID-19 pandemic, with lockdown and its economic and social impact, has accelerated many trends and, for the foreseeable future, changed how people work.

Flexible working is now on everyone's radar, and there is an opportunity to make it work well by taking a proactive approach. It should be available to everyone where possible; this report looks at making it more accessible for over 50s. This is a group that is now working longer, because they want to or have to. It's a group balancing their working lives with changes that come with ageing, from caring responsibilities and physical changes to a desire for more control over how they spend their time.

## What this means for employers

Many employers recognise the experience and skills that over 50s bring to their roles. But unlike other groups, such as working parents or young adults entering employment, over 50s haven't received the same level of focus and attention in terms of support, retention and recruitment.

## Flexible working today

At Timewise, we have championed flexible working as it moved from a benefit granted to working mothers, to a key factor in promoting work life balance.

The COVID-19 pandemic, and the associated upheaval in working practices, has shone a spotlight on flexible working. It has demonstrated how quickly people can adapt to technology, how communication forms can change, what the downsides of working from home can be, and where the opportunities lie for more and better flexible working.

And flexibility can have a massive impact on the working lives of people aged 50 and over. Many can combine flexible hours with their caring responsibilities, work from home to reduce the drain of commuting, or cut back their hours to maintain an income whilst freeing up time for other interests.

### **Muriel Tersago**

Principal Consultant, Timewise Foundation

# About this research and pilot



The collaboration between Timewise and the Centre for Ageing Better was designed as an 18-month programme to explore how over 50s can access the benefits of flexible working, bringing value to employers through improved employee wellbeing and motivation and, in the longer term, recruitment and retention. We did this through a two-phased programme:



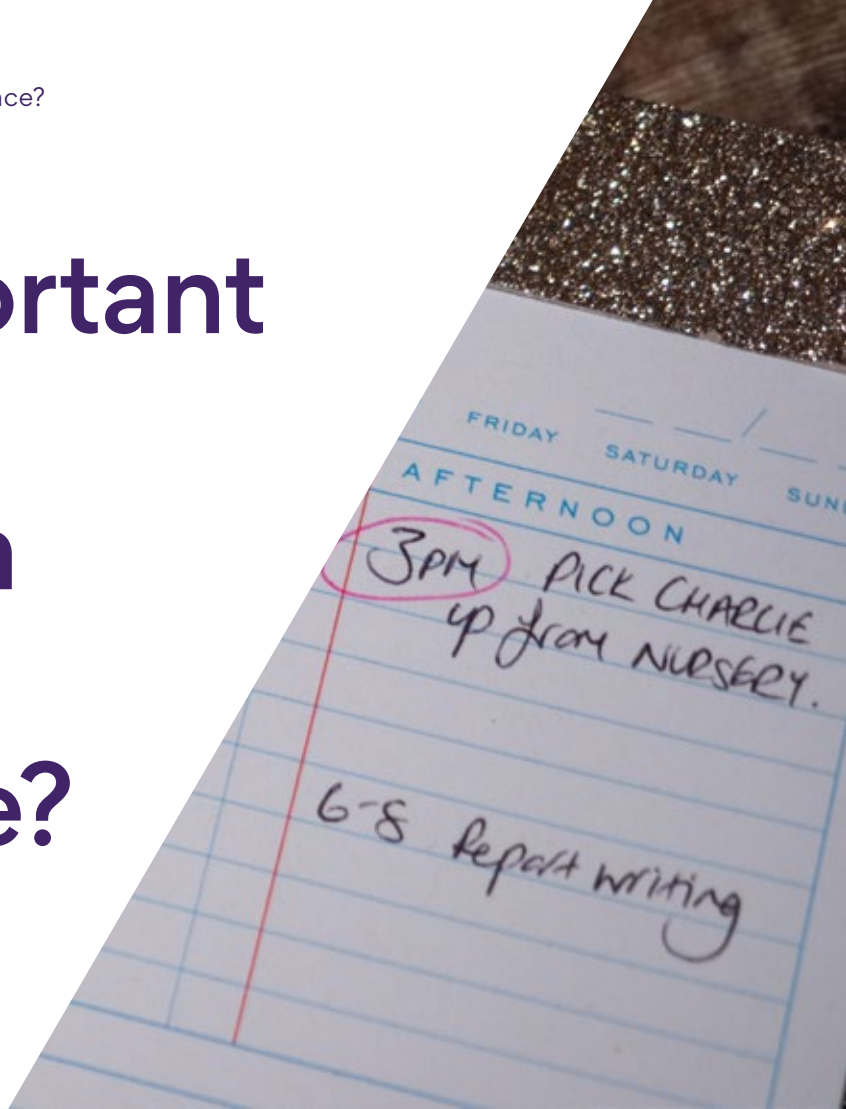
**1. Insights research:** The first phase consisted of focus groups and surveys with six large employers: Guy's and St Thomas' NHS Foundation Trust, Leeds City Council, Legal & General, McDonalds, Sodexo and Whitbread. We spoke to more than 40 staff aged 50 and over from these organisations, as well as 34 managers with older workers in their teams. We also ran a survey for over 50s, with 421 respondents, to understand attitudes and perceptions about work-life balance and flexible working, and to gain an insight into their lived experience. This was conducted between November 2018 and February 2019.

**2. Employer pilots:** Our research was followed by pilots with Guy's and St Thomas' NHS Foundation Trust, and two divisions at Legal & General. The purpose of the pilots was to bring about changes in working patterns for a cohort of over 50s, providing them and their managers with the training and tools to implement and adapt to different flexible working patterns.

Both employers used the lessons and resources to further develop their flexible working offer to their staff aged 50 and over, as well as other demographics. This part of the programme ran from May 2019 to February 2020, and was completed prior to the COVID-19 pandemic.

This report shares our insights and lessons, aiming to help more employers and over 50s access the benefits of flexible working.

# How important is flexible working in today's workplace?



The nine-to-five, office-based, conventional working pattern almost feels dated now, as employers and workers look for ways to meet business and personal needs. Large numbers of the UK's workforce have some form of flexible or part-time arrangement, across all sectors.

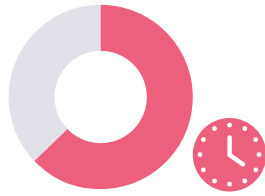
Everybody is familiar with the term flexible working, although what it means can vary between employers; and individuals themselves often have a different understanding based on personal experience. It can range from informal arrangements to formal working patterns with contractual changes.

### UK demand for flexible working<sup>3</sup>



**27%**

work part-time



**63%**

work full-time, but  
with some flexibility



**87%**

already work flexibly in  
some way, or want to

These numbers reflect the demand among workers for flexible working, whether it is latent or being met. What they don't reflect is that employers can find it difficult to offer and support flexible working across their organisations. Research by Timewise has shown low levels of proactive approaches to flexible working amongst employers; most managers still wait until an employee makes a formal request.

### Which age groups want to work flexibly?<sup>5</sup>

**92%**

of 18-34  
year-olds



**88%**

of 35-54  
year olds



**72%**

of those aged  
55 and over



There are differences in the demand for flexibility between demographic groups, with younger people working flexibly, or wanting to do so, most of all. But Timewise research shows that the demand for flexibility amongst older workers is high too, with almost three quarters of workers aged 55 and over either working flexibly already, or wanting to. Research by the Department for Work and Pensions identifies flexible working as the key factor in enabling people to work longer, but with nearly a third of over 50s not realising they have the right to request flexible working and almost a quarter not being comfortable asking<sup>4</sup>.

<sup>3</sup> <https://timewise.co.uk/article/flexible-working-talent-imperative>

<sup>4</sup> [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/394642/attitudes-over-50s-fuller-workinglives.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/394642/attitudes-over-50s-fuller-workinglives.pdf)

<sup>5</sup> <https://timewise.co.uk/article/flexible-working-talent-imperative>

## Low levels of proactive approaches to flexible working

# 4 in 5

line managers have never proactively raised flexible working at annual appraisals

[timewise.co.uk/article/proactive-approaches-flexible-working](https://timewise.co.uk/article/proactive-approaches-flexible-working)



# 85%

of job adverts do not offer any form of flexible working

[timewise.co.uk/article/flexible-jobs-index](https://timewise.co.uk/article/flexible-jobs-index)



Having a flexible working policy and application process doesn't in itself result in good flexible working practices. An open, proactive approach at the team level, aligned with messaging, guidelines and senior support at the organisational level, are the hallmarks of successful flexible working.

Flexible working works well when it works for both employee and employer. To get to this requires planning, communication, leadership, skills and a willingness to try.



How important is flexible working in today's workplace?





# The business case for flexible working –

and why it's strong for workers aged 50 and over



**The rise of flexible working has been characterised by the dynamics of supply and demand, and it's no different for this demographic.**

There is a real opportunity to make changes that will have a significant impact for workers over 50 and the value they bring to their employers. More widely, employers are increasingly recognising the opportunities that increased flexible working options can bring to their business or service offering.

**The factors on the supply side of the labour market are clear:**

- An ageing workforce: over 50s make up a third of the workforce (<https://www.ageing-better.org.uk/news/number-over-50s-uk-workforce-10-million>)
- Increased participation in the labour market by people aged 50 and over: 50-64 year olds account for half of the annual increase in employment. (<https://www.peoplemanagement.co.uk/news/articles/over-fifties-account-majority-uk-employment-growth-ons>)
- Many want or need to keep working to supplement their savings and pensions, and in response to the ongoing changes to the state pension age.
- Many want to realise the health and well-being benefits that come with good employment.

**As are the factors on the demand side:**

- Employers will be looking to change working patterns as a result of the COVID-19 pandemic, especially for older staff who are vulnerable to the virus.
- Skills shortages across a range of sectors – again, COVID-19 is likely to impact sectors very differently.
- An ongoing growth of knowledge-based roles in which experience and skills brought by over 50s are prized.

Some employers have embraced initiatives such as multigenerational teams (to bring cognitive diversity and different perspectives to teams) or mid-life MOTs (to review skills, health and finance in middle age). But there has not been the same impetus around flexible working and over 50s.

Flexible and part-time working are widely acknowledged to be pivotal in creating a workplace that allows over 50s to balance the demands of caring, health issues and mental wellbeing, with the desire or need to work. Flexible working patterns can also provide a bridge to retirement, giving workers more control over how long they keep working, while having the time to build a life beyond work.

The mechanics of flexible working for people aged 50 and over might not be different than for other demographics, but appreciating their needs and wants might precipitate a different approach to engaging them and retaining their skills and experience.

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**Flexible and part-time working are widely acknowledged to be pivotal in creating a workplace that allows over 50s to balance the demands of caring, health issues and mental wellbeing, with the desire or need to work.**

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# Is flexible working different for over 50s?



In the first part of the programme, insights research, Timewise worked with six large employers (Guy's and St Thomas' NHS Foundation Trust, Leeds City Council, Legal & General, McDonalds, Sodexo and Whitbread) to explore some of the assumptions around over 50s and flexible working, and matched these against the experience of the workers themselves.

This insights research was done through a survey for staff over 50 (either across the entire organisation or in specific divisions) and a series of focus groups with over 50s staff and also with line managers who had people aged 50 and over in their teams.

The findings are summarised below. Please note the wide range of ages, levels of seniority and role types when considering the data. 'Over 50' covers a number of age groups and the perspective of a 51-year-old is likely to be different to a 64-year-old's. The nature of different job roles is likely to influence people's views on flexibility, including the extent to which part-time work is a financially viable option, the extent to which physically demanding roles can be maintained with ageing and the (sometimes perceived rather than actual) scope for flexibility in a role.

## Reasons over 50s want flexible working

We spoke to a range of people in different roles, with different skill sets and levels of seniority across the different employers. Despite this variation, the reasons for wanting more flexibility were universal: caring responsibilities, physical aspects of ageing, wanting to enjoy other aspects of life and managing the transition to retirement.

People face different challenges at different stages in life, many of which cannot be planned for. This is no different for over 50s – they often have competing demands on their time, together with physical changes, which can be increasingly incompatible with expected working arrangements. Almost three-quarters cited work-life balance as the key driver for flexible working. And as well as a changing perspective on how they want to be spending their time, many have very real financial constraints. In addition, over half of survey respondents felt their job was getting harder for them as they got older.

**Survey question:** Please indicate why you are currently working flexibly/part-time, or would like to



Work-life balance **72%**



More time for self **34%**



Caring **34%**



Managing commute **31%**



Health reasons **29%**

(Insights Research Feb 2019)



**“I’m tired from work, housework and looking after older parents – it’s like drowning.”**

Over 50s employee

## Experiences of asking for flexible working

The insights research findings were mixed across individuals and employers, which reflects the very different employers, types of work and prevalence of flexible working in specific teams.

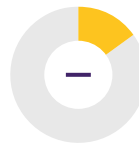
While some of the cohort expressed concerns about how comfortable they felt talking about flexibility, the survey results suggest most over 50s have a good understanding of what flexibility is possible with their employer, and of the process for speaking to their line manager about it.

**I have a good understanding of the different flexible working options in my organisation**

**61%**  
strongly agree/agree



**15%**  
neither



**24%**  
disagree/  
strongly disagree

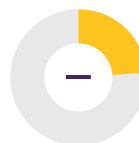


**It is easy for me to talk to my line manager about options for flexible working**

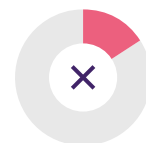
**60%**  
strongly agree/agree



**24%**  
neither



**16%**  
disagree/  
strongly disagree



**I feel comfortable talking about the reasons I might want to work flexibly**

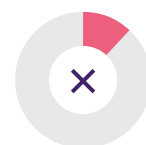
**71%**  
strongly agree/agree



**16%**  
neither



**12%**  
disagree/  
strongly disagree



Totals may not add to 100 due to rounding



### When flexible working works well:

- Both employee and their manager have a good understanding of the components of a role and how it fits with business aims and the team
- There are collaborative and supportive relationships within teams and between line managers and employees
- People have role models they can relate to and flexible working is visibly promoted



**“We all have different reasons and it’s the same for most people as they get older.”**

Line manager

### Are some reasons for wanting flexibility perceived as more important than others?

While flexible working is widely perceived to be helpful for parents, the caring roles of people aged 50s and over may be less widely talked about in the workplace. A part of this insights research was to explore whether there was a tendency to give greater weight to some reasons for wanting flexibility. The insights research didn’t uncover a hierarchy of needs, as perceived by managers or employees.

Both managers and staff felt that while it might be helpful to talk about why someone needed flexible working, reasons shouldn’t be accorded different levels of validity. In addition, there was a feeling that while younger managers may not pre-empt needs relating to ageing, they were usually sympathetic to these.



**“It can be awkward and depends on your manager.”**

Over 50s employee



“I’m not sure that some reasons are seen as better than others. It’s more about whether it can work in your role and you can talk to your manager easily.”

Over 50s employee

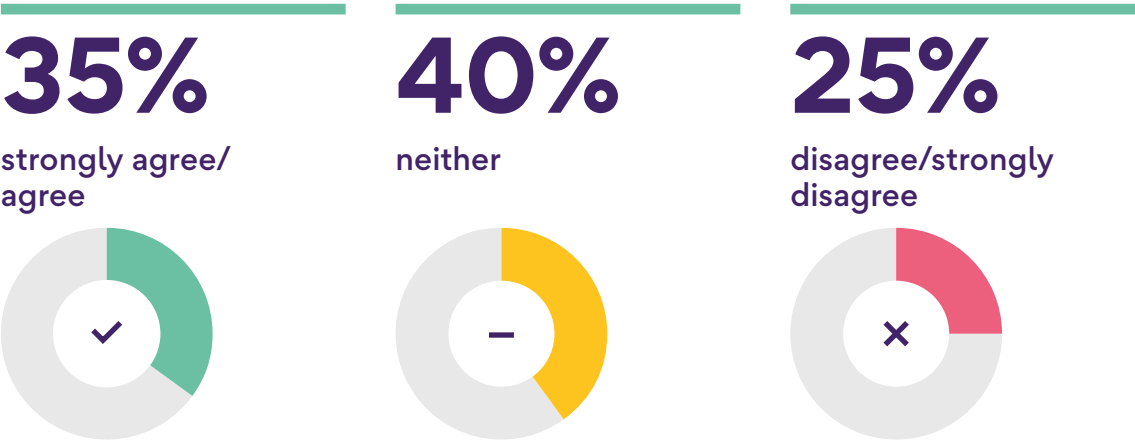


“We should have a reason-neutral policy. Staff should only have to say why they need more flexibility so we can see what might work.”

Line manager



My line manager is more likely to say ‘yes’ to a flexible working request from a parent with a young child than to a worker over 50



## Attitudes towards work

The survey showed that staff aged 50 and over have a good level of awareness of flexible working rights and options; however, they have a lower sense of entitlement to flexible working than might be the case in a much younger generation. In addition, there is a strong work ethic in this demographic, with a sense of professionalism and reliability (expressed by both workers and line managers).



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**“I’d stay on well beyond retirement if I can make it work. I enjoy working.”**

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Over 50s employee

While this study didn’t focus on gender differences specifically, other research has shown that the uptake of part-time work varies considerably between genders. In the 50-54-year-old age group, over 40% of women work part-time (compared to less than 10% of men) and in the 60-65-year-old group, over 60% of women work part-time, compared to just over 20% of men ([source publications.parliament.uk/pa/cm201516/cmselect/cmwomeq/584/58405.htm](https://publications.parliament.uk/pa/cm201516/cmselect/cmwomeq/584/58405.htm)).

In this research, discrepancy in part-time working levels was seen in focus groups with people in lower-skilled roles, in which women tended to select shift patterns that worked around their caring commitments, while men felt that their work could only be done full-time. The difference in part-time and full-time working patterns between the genders was not evident in discussion with people in higher skilled roles.

## Reasons why flexible working can be difficult, for this age group and others

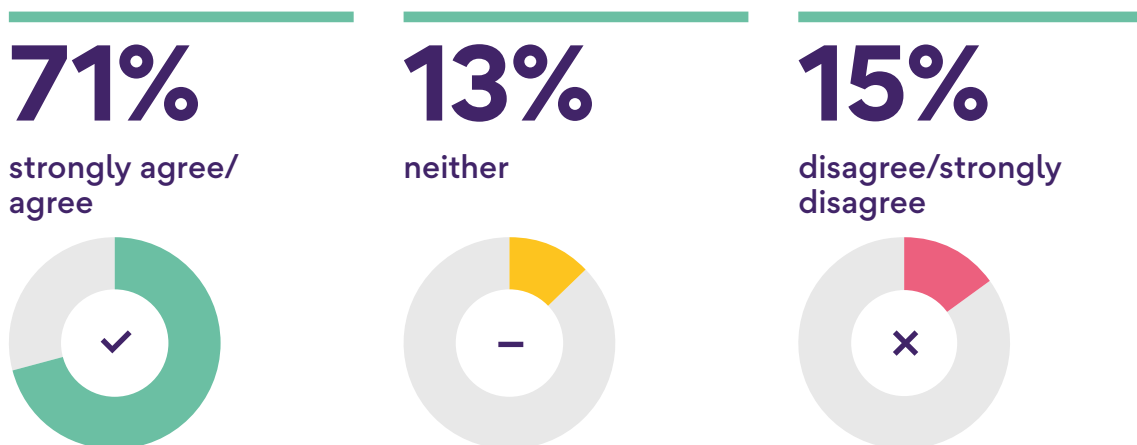
Successful flexible working requires commitment, skills and a change in working practices. There are real and perceived constraints, which are relevant to both older workers and other demographic groups.

During the focus groups for over 50s employees, a number of issues were raised around flexible working, including workload, stigma, demotion, and how well flexible arrangements work in practice (especially for part-time work). In separate focus groups, attended by line managers with people aged 50 and over in their teams, many of the same concerns were raised: workload, commercial and service level targets, extra work involved in managing flexible workers, fairness to the rest of the team and setting a precedent that they could not offer across their team.

Part-time work was seen as particularly difficult, with the associated loss in income and difficulties in workload allocation.



I'd like to work fewer hours but cannot afford a reduction in my salary



Totals may not add to 100 due to rounding

Many of the problems faced by over 50s are faced by all those who work flexibly or want to. Creating flexibility within roles, creating new flexible roles, and creating capacity to manage flexibility are all challenges at line manager and organisational level.



**“It’s hard to imagine how to do your own job differently and a lot of managers don’t know how to do it either.”**

Over 50s employee



**“There is a danger of first-come-first-serve. As a manager, it’s hard if I have to decide whose reason is more valid.”**

Line Manager with over 50s in their team

### **In summary: The same but different**

The core of good flexible working (especially around flexible job design, skills and a supportive culture) will be very similar across different age groups. It’s ‘what happens at the edges’ that is different for over 50s. This includes:

- their reasons for needing flexibility
- how easy it is to talk about working flexibly
- what sort of flexible patterns work and why
- how flexibility can be used to plan towards retirement
- how roles can combine flexibility with the specific value older workers bring to their employer.

We used the findings from the insights research as a springboard for the next phase of work, discussed in the next section.



# Lessons from the employers' pilot programme



## **The second phase of the programme comprised pilots with Guy's and St Thomas' NHS Foundation Trust and Legal & General.**

Guy's and St Thomas' is one of the UK's leading NHS hospital trusts with a turnover of £1.6 billion and 17,500 staff. Based in south London, they provide 2.6 million patient contacts each year across several sites. Legal & General is a multinational financial services company, headquartered in London. It is the UK's market leader in life insurance and critical illness cover, in addition to providing services and products in asset management, pensions and annuities.

Both are large employers with a wide range of job roles, many of which require high levels of skills and experience. They are well-regarded employers, with high profiles in their own sectors.

The aim of the pilots was to change the working patterns of a cohort of over 50s, providing support and guidance for them and their line managers. We did this through a mix of diagnostic work, training workshops and follow-up work with individuals. In both Guy's and St Thomas' and Legal & General, the initiative was communicated in the context of improving flexible working opportunities across the organisation.

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“This pilot supports our People Strategy around offering a range of flexible employment opportunities to enhance staff recruitment, retention, new ways of working and ultimately patient experience. Although we have a predominantly younger workforce, there is a gradual rising trend in staff over 50 in some service areas and we were keen to raise the profile of this topic and engage our 50+s in conversation to understand how best to practically support a healthier and happier later working life whilst retaining their valuable skills, knowledge and expertise. This is part of a wider programme of work to support flexibility for all staff across the organisation and will be a key feature in the recent Covid-19 pandemic new ways of working learning.”

Lynn Demeda, Director of Workforce Programmes,  
Guy's and St Thomas' NHS Foundation Trust

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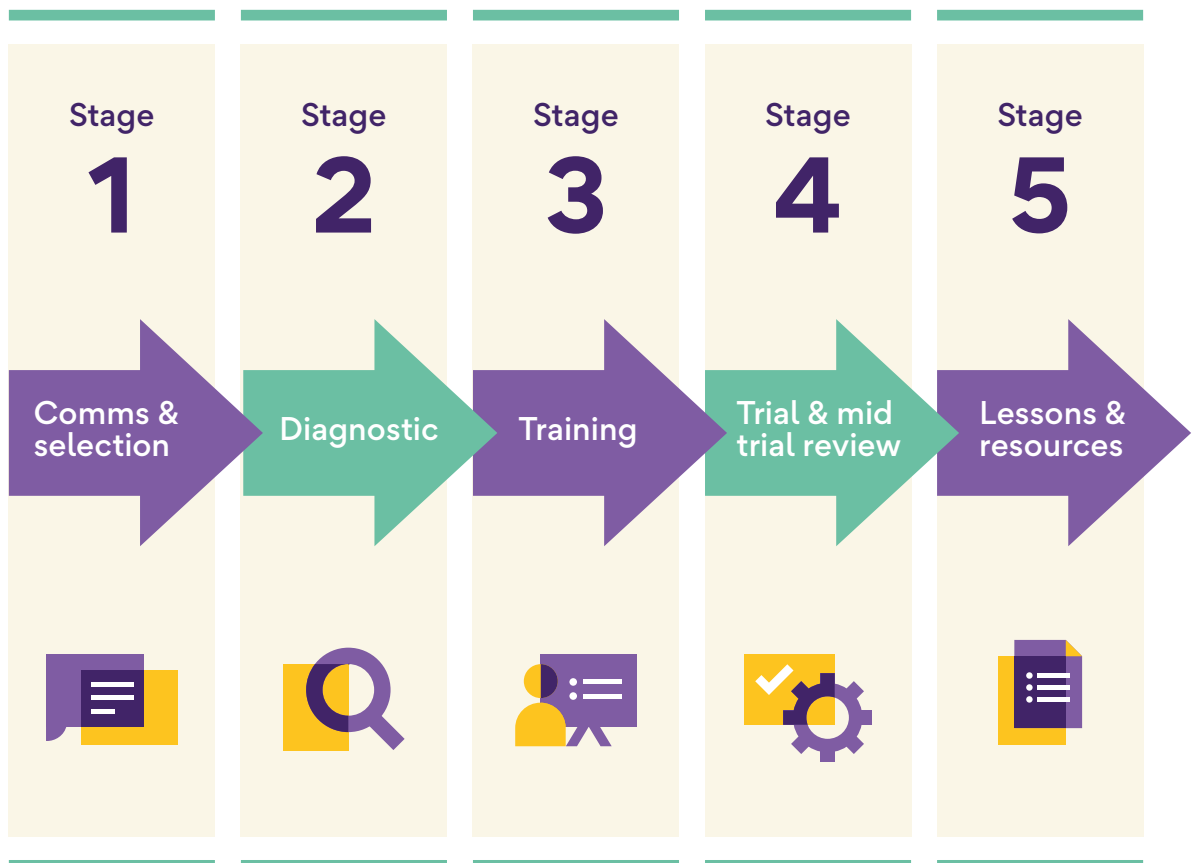
“We've made great inroads into developing agile ways of working at L&G, but we know that we still have work to do to communicate the options to our people, and engage them more fully. As a specific cohort, we were particularly interested to learn how we could tackle this for older workers, and we are also committed to reviewing this for all our employees. This study was a fantastic opportunity to approach this challenge.”

Phil Anderson, Chief Operating Officer, LGRI, Legal & General

## Pilot overview

The pilots were a five-stage programme, starting with communications to engage staff and managers and completing with the development of resources that could be used more widely across the organisation. While each stage was focused on over 50s and informed by the insights research, the materials used could be adapted for use by all demographic groups.

The diagnostic work focused on the individual's job role, providing a steer to consider what sort of flexibility might be possible. The training was designed to look at flexible working from an organisation-wide perspective, and then concentrate on what flexibility would work at the individual level within their team. This was followed by discussions around the implications of working flexibly and what changes were needed.



The participants came from a wide range of job roles, from community nurses through to senior programme managers. They were looking for more flexibility in their roles for a number of reasons, including:

- to provide care for a grandchild
- to have more time for voluntary work
- to help to alleviate chronic back pain
- to better manage time while pursuing a further academic career
- to create breathing space within demanding job roles.

Working with their line managers, the participants confirmed the flexible working pattern they wanted to trial for a two-month period. A range of options were agreed: compressed week or fortnight, staggered hours, flexitime and working from home. Many adapted their original thinking to fit with what worked for their team. Midway through, follow-up calls were conducted to discuss progress, which was positive in all cases.

At the end of the trial period, almost all the participants requested that the trial flexible working pattern become permanent and this was agreed.




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**“Their experience, acumen, networks, level of professionalism, technical knowledge and mature thinking – it’s too valuable to risk losing. We need to find ways that help older staff manage their personal and work commitments.”**

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Line manager

## Lessons from the pilot

The pilot programme stretched over several months and provided numerous opportunities to work with over 50s and their line managers. The lessons are based on discussions throughout the programme.

This wasn't a controlled study but an intervention in how people work, with implications for their managers and teams, as well as their personal lives. All of the work was in the context of existing flexible working policy and practices in Guy's and St Thomas' and Legal & General; it presented an opportunity to build on what works and tackle some of the obstacles that hinder good flexible working.



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**“It’s just brilliant. It’s made such a difference to my life and I think my work is even a bit better than before.”**

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Pilot participant



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**“As a manager, I’d say there has been no adverse impact on performance whatsoever. I’ve been open with the team about it, and it’s an opportunity to see what else is possible.”**

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Line manager

## The key lessons

### **Over 50s' reasons for flexibility vary, and so do the patterns that work for them and their role**

The reasons and preferred options for flexibility varied considerably. The nature of the reasons also meant that the statutory once-a-year request policy didn't always work for this group. Health or caring issues are likely to arise unexpectedly and a supple approach to making a flexible working request is more fit-for-purpose. It is important to distinguish between formal and informal flexible working, and allow for short term changes in response to a specific need.

For those wanting to maintain full-time hours, a compressed week was a popular way to create more personal time and appears to work well for knowledge-based roles where employees have a large degree of autonomy already, and trust from their managers. Another option is annualised hours, in which employees work longer hours and bank these against longer holidays. Staggered hours can help those who feel early starts match their energy levels better or late starts mitigate against the strain of long commutes.

A small change in a working pattern can have a significant impact on a person's work-life balance, with no adverse effect on performance and minimal wider impact to their employer. This was particularly noticeable where staff could work from home more, or change their start times.

Good flexible design is key as it enables both the employee and their line manager to work through the detail of what flexibility is possible in a role and what the implications are. Support can be provided through training, guidelines and, where helpful, facilitation.

### **Key points**

- A 'reason-neutral' flexible working policy is important, even though people often want to talk about why they would like more flexibility.
- The reason for flexible working doesn't require validation, but can help to determine what type of flexibility will work best.
- Recognise that the need for flexible working might arrive at different times of the year and might change over time.
- Be open to small changes making a big difference for the individual. Give staff the confidence to have that conversation.





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**“Sometimes you need some flexibility for health reasons, your own or someone in the family, and that can happen at any time.”**

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Line manager



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**“I’m at the point where I realise there are a number of things I still want to do in my life. I want to keep working but carve out more time for myself.”**

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Pilot participant



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**“My sleep cycles have changed. I’m now wide awake at 6am and being able to work from 7.30am onwards makes a big difference to how I feel later in the day.”**

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Pilot participant



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**“I can see it’s made a huge difference for her – she’s more motivated and focussed. It works well for the rest of the team, too.”**

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Line manager

## Implications of considering part-time work for over 50s

Many were keen to, or had to, maintain full-time work. The financial implications of any change in working patterns are important in this group. For those interested in reducing their hours, understanding the pension implications for any change to part-time work, or job shares, are an important part of the discussion around flexible working. Employers can help individuals to understand the specific financial implications of any decisions they make.

Flexi-retirement was seen as an interesting option to explore. On reaching retirement, individuals can draw on their pensions and supplement their income through returning to work (often on a part-time or job share basis). Employers can help older workers to understand the options available to them.



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**“I’d love to work part-time – who wouldn’t at this age? But I cannot afford to yet.”**

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Pilot participant

## Participant case studies

Take a look at the case studies at the end of this report. They bring to life how changing to a flexible working pattern made a big difference to the lives of over 50s who participated in the pilots. And how any impact on the wider team and the business deliverables was entirely positive.

## Career management and older workers

It is a false assumption that over 50s aren't interested in career development. While many spoke of intrinsic motivators such as the value of the work and the personal relationships developed, most were keen to continue with interesting and valued work. This was reflected by their managers.

Specific initiatives aimed at older workers need to be carefully managed and communicated to ensure there are no perceptions or accusation of age discrimination. Supporting people aged 50 and over to work flexibly is ideally part of a drive to enable more flexible working for all employees.



**“We cannot be complacent about keeping their expertise and knowing how things work. Talent management shouldn't stop when people get older.”**

Line manager



**“Working flexibly doesn't mean lowering the expectations you have of your staff, or creating fewer opportunities. But you do need to make sure you can talk about it and support them.”**

Line manager



**“My friends outside work think this is a great thing to be doing. I wouldn't have asked if it wasn't for the pilot.”**

Pilot participant

## Having an informal discussion about flexible working

Both line managers and staff benefit from being able to talk about what sort of flexibility might be possible in a role, before a formal request is made. Quite often an informal flexible working pattern can be agreed, without requiring a formal change in contract (though it should be recorded centrally).

**1. Preparation.** Both sides should consider what sort of flexibility is possible in a role. Questions to ask include:

- Can the role be done from home occasionally?
- Can the work be completed at different times?
- Where are the interdependencies with the rest of the team?
- When are the core hours in client facing roles?
- What are the risks?

**2. Discussion.** An open conversation should cover the following:

- How performance can be maintained
- How communication will be managed
- Whether cover will be required.

**3. Negotiation and agreement.** A line manager will want to ensure there are no adverse implications on performance and the rest of the team. Together it's worth discussing:

- Different options for flexibility
- What a trial would look like
- What's the best way to ensure success?

# Recommendations for employers



**Flexible working is a strategic workforce tool, which can motivate and improve staff work-life balance, while maintaining or improving performance. For each employer, it should tie into strategic workforce priorities and planning, as well as employee well-being.**

Improving flexible working for people aged 50 and over will be most effective if it is done as part of a wider drive to enable more flexible working. This is important for a number of reasons. Flexible working should be offered to all employees where it's possible and 'positive discrimination' towards older workers can send the wrong signal. In addition, over 50s may feel concerned that they are being sidelined or targeted for redundancy. Good communication is, as always, essential.

A recommended approach is outlined below.



# 1. Develop your business case

**Different employers will have different reasons for wanting to enable more flexible working and it is important to consider it from different angles:**

- The workforce priorities tied to your strategic aims – which could include workforce planning, recruitment and retention, reflection of client base and customer strategy, staff wellbeing and addressing the gender pay gap.
- Your corporate social responsibility and social purpose.
- The link to your organisational values and other people-related initiatives.

The case you develop is likely to involve all of the above and it will be important to reflect this in any communication.

**Your workforce strategy will highlight current and forecast staff and skills shortages and surplus. In addition, you can look at:**

- What proportion is made up by employees who fall into the 50-55, 56-60 and 60+ age groups?
- When, historically, do people leave and is there any recruitment at this age?
- How labour and skill gaps could be addressed and pre-empted by greater recruitment and retention of older workers.
- The extent to which you offer career development or management to this age group.

It's important not to do this in isolation – as with any programme, engaging people is best started by asking others their views.



## 2. Assess your current level of flexibility as an organisation

Review what flexible working is currently like in your organisation (across all age groups). Is your policy well communicated? Is flexible working actively promoted and supported? What sort of flexible options are possible? How many people are working flexibly? How many senior people are working flexibly?

### **You may want to:**

- Review your flexible working policy and application process – is it clear, well-communicated and understood?
- Identify how many people work flexibly. Part-time working and annualised hours will be recorded by HR but it is likely that a number of people have informal arrangements around working from home and late starts.
- Do you have clarity around health and carer policies? Is there a good uptake of these in practice?
- Seek out the pockets of good practice. Identify teams where flexible arrangements are in place and ask how they make it work.

### **Get some feedback on flexible working**

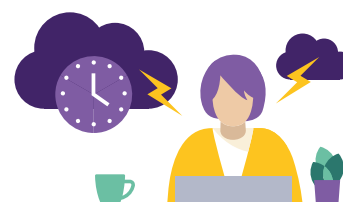
You may want to run a short survey and hold a number of focus groups to get manager and staff views on flexible working, as well as an indication of the number of informal arrangements. You should use this as an opportunity to learn more about over 50s in your organisation, to better understand their specific concerns and needs around accessing flexible working. This can be done in data survey analysis (using age brackets as a category) and with targeted focus groups.

## Indicators of a good flexible working environment



✓	→	Clear and well understood policy and procedures around flexible working.
✓	→	Support from senior management.
✓	→	Open conversations between managers and staff at individual and team level.
✓	→	A sense of shared responsibility to make it work.
✓	→	A range of formal and informal arrangements.

## Indicators of a poor flexible working environment



✗	→	Inconsistency across the organisation.
✗	→	A feeling that people are often treated unfairly.
✗	→	A tendency to keep flexible arrangements quiet.
✗	→	Staff feeling they will be turned down and managers asserting that it cannot be done in their teams.
✗	→	A limited number of arrangements, many of which are long-held legacy arrangements.

### 3. Developing and rolling out a programme

Based on what you have learnt so far and what you want to achieve, you will now be able to start shaping what you want to do. This might be a small, targeted intervention, or a more widely promoted large scale one. In any case, start by articulating and validating the following:

**Scope:**

- overall aim (relating to business, social purpose or organisational values)
- specific objectives
- how you adjust the detail to make flexible working accessible to different groups.

**Communication:**

- confirm your key messages and how these should be communicated
- create the opportunity for clarification and feedback.

Make sure you are sensitive to how your planned intervention might be perceived – both by older workers and more widely – and build this into any communication. People interpret messages based on their previous experience and personal attitudes. Some may welcome an initiative that they feel reflects the organisation's practices of looking after staff. It's important to pre-empt how different groups of people may respond and factor this into your communications.

#### Consider how people interpret messages differently

A communication about flexible working is likely to get a range of responses:

- “Does that mean that they want people to work part-time? I cannot take a pay cut.”
- “Is this a way to put us on zero-hours contracts?”
- “I’ve already got three part-timers on my team – cannot have anymore.”
- “I’m interested – I know exactly what would suit me.”

## 3.2 Training and support

Based on your assessment of existing flexible working policy and practice, consider how you can best support staff and managers. This might be in the shape of training and support materials. There should be a focus on:

- Working with job holders and their line managers to identify what scope for flexibility there might be in different roles.
- Discussing the implications of changing to a more flexible working pattern.
- How they can trial a different working pattern.

Use this as an opportunity to update your support materials. Templates and structured questioning are a much more helpful way to get people to think about flexibility, than an outline of your flexible working policy. Remember to focus on how it can be made to work, with an emphasis on outcomes rather than presenteeism.

### Options to target support for over 50s

#### You may want to consider:

- offering information about how flexibility affects pensions and retirement options
- reinforcing the validity of ALL reasons for wanting to work flexibly (it's not just for parents)
- offering a range of informal and formal flexible working options, which can be combined and varied according to personal and business needs.

Are there other opportunities to discuss flexible working with your employees in this age group? Many organisations run midlife MOTs that focus on different aspects of work, wellbeing and finances. Exploring options for flexible working spans all three.

# Conclusion



The demographic trends of an ageing population and workforce will continue. The changes in the workplace, around flexible working and the use of technology, are accelerating. Employers increasingly recognise that flexible working is about more than staff retention and the employer value proposition – it can bring benefits in employee well-being and motivation, talent attraction and addressing issues around the gender pay gap.

The principles and messaging around flexibility happen at the organisational level; how it works in practice happens at the team level. There isn't really a difference in how you operationalise flexible working for older workers, but there are steps an employer can take to support their over 50s to access the benefits of flexible working. These include recognising the different drivers for wanting flexibility and how this translates into different options for formal and informal flexible patterns; ensuring managers are open and proactive about discussing needs for flexibility; and looking at what flexibility is possible across a team.



The structure of this programme – insights research and pilots – allowed different aspects of flexible working and older workers to surface. The insights research suggested that people aged 50 and over had a good awareness of the flexible options available and how to make an application; the pilot showed that thinking it through in practice is what can prove more difficult. Similarly, the reasons cited for wanting more flexibility in the survey and focus groups (some of which were specific to this demographic), don't need to be cited during an application. In the pilot training sessions, many participants found it useful to discuss these – personal and work life do overlap, and the reasons for needing flexibility can help to direct people towards a pattern that works. The work ethic and experience older workers bring is prized by employers – understanding and trialling different flexible working options can help this group to stay in work longer.

In the future, people might well look back and wonder why anyone ever thought it was a good idea to work fixed times and in a fixed place, when it was just not needed for so many job roles. Flexible working is the future way of working, and employers need to support their older workers to benefit from it.



## Appendix: Case studies BP (Legal & General)



### **Working a compressed week with a variable day off requires focus, good planning and remaining responsive to business needs. But it freed up a day per week for family and out-of-work interests.**

Being a Programme Manager at Legal & General is a demanding role. Like many people in senior positions, B finds that working longer hours is seen to come with the territory. The work is complex with outcomes measured over months rather than days or weeks.

When B joined the pilot, she was keen to understand what sort of flexibility would allow her to run the tough projects and maintain a high profile within the team, but have more time to spend with her teenage children and have some time left for herself.

Legal & General's agile policy meant B could already work from home a day a week and she considered flexible hours. Flexible hours work well in many roles, but it can feel like 'mission creep' in which your job feels present in all parts of your life.

Instead, with support from her manager, she opted to trial a compressed week – completing her workload in four days and having the fifth day off. This could be a real challenge given the grade and the workload.

Together with her line manager, she clarified the principles of how she would work. Being responsive to business needs meant she would vary which day she took off, and dial in for meetings if needed. She made it clear to the team that she would always be available on her day off, and that her performance and commitment would be the same as before. Her manager was similarly open about his expectations and how he would support her to make it a success.

B has found that being really clear on her work priorities, together with sharp planning, have allowed her to maintain her work performance and free up an extra day for herself. She loves the extra time she has for her family and out-of-work interests.

Both B and her manager feel that the maturity of the team, clarity around expected outcomes and trust have been key to making this a success.

## Appendix: Case studies JS (Legal & General)



### **Working a compressed week with a fixed day off meant cross-team planning, clarity on required outcomes and a willingness to support each other. It also resulted in a real improvement in work-life balance.**

Being a Customer Service Team Manager suggests you need to be there during core office hours, and there to oversee and support your team. And that's how J had been working at Legal & General for a number of years. But the pilot presented an opportunity to see if other, more flexible working patterns might be possible in this role.

J was keen to maintain her full hours and considered both flexible hours and a compressed week. Different patterns provide different benefits and it is worth considering what works best in a role and for the individual. J's role requires visibility, responsiveness and oversight of others' work on a daily basis. She opted for trialling a compressed week with a fixed day off. Together with her line manager, the other Customer Service Team Managers and her team, she worked through the details of cover, escalation, decision-making and communication for the day she wouldn't be in the office.

The trial has been 'perfect', providing a much better work-life balance and a real improvement in wellbeing for J. Her manager agrees it is working well – there's another person doing the same role as J who also works a compressed week. Across the different teams, the managers ensure lines of accountability and decision-making are clear. J's new arrangement has also provided opportunities for others to take on more interesting responsibilities – flexible working of a more senior person can often provide development opportunities for more junior people.

The success factors are clear: shared planning, openness, clarity on what's needed and a willingness to support each other. These are all hallmarks of effective self-organising teams, which often provide scope for more flexibility for everyone within a team.



Appendix: Case studies  
**MA and TM (Guys' and St Thomas'  
 NHS Foundation Trust)**



## **A review of the team workload and individual responsibilities allowed two team members to move to a compressed week, giving them more time for personal commitments and better work-life balance.**

Any role in a hospital trust is busy. Being part of the Overseas Visitors Team means being available on site to spend time with patients and doing the associated administrative work. M and T have been working in the team of six for several years, and were interested in what options for flexible working might be possible in their role – the pilot was a good impetus for this.

Both were keen to maintain their full-time roles, but free up time during the week for childcare and wellbeing reasons. They looked at a compressed week, with fixed but different days off.

Their line manager was supportive and looked to see what was possible, given the nature of their roles and the workload across the team.

The trial has been a success for both. M says the day off has made a great impact on her childcare responsibilities, and T feels their work-life balance is much better. They both feel better rested and more efficient at work, and have reorganised their tasks to ensure the admin work is done later in the day. Their manager is pleased with the results – there has been no change in the pace or volume of work, and both M and T are more motivated and happier in their roles.

This has been an opportunity to consider how work is done, and when. It's given the team confidence to think about what sort of other flexibility might be possible more widely across the team – where and when different tasks can be done, and what sort of substitutability is possible.

Both M and T are experienced and skilled in their roles, and had a number of ideas on how the work could be done flexibly. The pilot gave them the opportunity to work with their manager to consider how work could be done differently and better.



## Appendix: Case studies RH (Guy's and St Thomas' NHS Foundation Trust)

### **Adopting an attitude that service and personal needs can be met by an ongoing flexible approach has meant that R has greater control of when and where he works, meeting service needs and balancing this with when he wants more time off.**

As Senior ITC Manager at Guy's and St Thomas' NHS Foundation Trust, R is confident and knowledgeable about what is required in his role. He has also been able to work with a degree of flexibility already, with a working pattern of 8am to 4pm and working from home one day a week. R, who is 57, really enjoys his job at the Trust and wants to keep working for some time.

But he also wants a better work-life balance and an important part of this is having the time to travel for extended periods, as well as some more time during the working week.

Together with his manager, they reviewed the current and predicted workloads and agreed to trial a compressed fortnight – longer hours over the course of nine working days, with the tenth day off. This arrangement can work well in roles where the volume and complexity of the work make a compressed week too intense. In addition, as and when the tenth day cannot be taken, Richard would bank the time for additional leave, being able to build up 'blocks' of five days.

The arrangement was well-thought out and discussed in detail and all geared up to work successfully.

Then there were changes in both work demands and R's personal needs. The volume of work increased significantly and R was working longer hours and not taking his tenth day off. In addition, he was struggling with back pain that affected his sleep. However, he now felt he could decide more easily when he would work, and could fit this in depending on how he felt.

The pilot didn't go exactly as planned for R, but what it has done is lay the foundations for R to work more flexibly going forward. He and his manager have discussed performance expectations and how the flexibility can work in practice. They have an open and collaborative approach to seeing what is possible and what works in practice. R feels he now has significantly greater autonomy and control over his work, and is motivated knowing that he can clock up extra time worked to take off in the future. He feels that working in an agile way is better for the department, and for his own well-being, and has created more opportunities to think about how he can work in the coming years.

## Appendix: Case studies

### SL (Guy's and St Thomas' NHS Foundation Trust)



**Working from home a day a week allows S to enjoy the social side of working, while having the space to concentrate better and not be worn down by a long commute. It's also given him more confidence about how his work might be done when he wants to start to transition to retirement.**

S joined the pilot at Guy's and St Thomas' NHS Foundation Trust for a number of reasons. As the Information Manager and Data Analyst in the Clinical Imagery and Medical Physics Directorate, he enjoyed his work immensely but was starting to feel that there might be other ways of having a good work-life balance now and in the future.

With a long commute every day, working from home a day a week seemed an obvious choice. He had done it before on an informal basis, and it worked well – the technology was there, he had space at home to concentrate and was as contactable as being on site. He was keen not to extend working from home too much more, feeling he liked the social side of work. The day at home also tied in well with an academic course S has been doing one evening a week in London.

It was a straightforward transition for the pilot – all the stakeholders were informed of S's working pattern, he kept his work diary updated and ensured he was in for meetings. His manager, supportive from the start, was open about the need to have discussions around flexible working patterns for everyone. A lot of roles can easily provide scope for some flexibility, and employees shouldn't have reservations about asking and feeling confident it can be made to work. It's even better when line managers can open the conversation.

The trial, which both are confident will work as a permanent arrangement, has also helped S think more about what sort of flexibility, including part-time, may work in the years ahead. In addition, it's further consolidated the good working relationship he has with his line manager – they talk openly about matching the job requirements to S's preferred working pattern, now and in the future.

Let's take action today for all our tomorrows.  
**Let's make ageing better.**



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and is freely available at **[ageing-better.org.uk](https://ageing-better.org.uk)**

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