Action Plan for Age and Economy – Edinburgh

ACTIVE A.G.E. - Urbact II Thematic Network

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1. Introduction

Scotland

Since the census of 2001, the Scottish Government and leading academics in Scotland have expressed concern over the falling number of births in Scotland and the ageing and decline of the population which has occurred over recent decades. Scotland's population reached its peak in the mid-1970s, and has slowly declined since that time to its current total of 5.1m.

The major reason is seen to be emigration from Scotland - particularly to the rest of the United Kingdom - although recent years have seen that trend reversed with significant immigration to Scotland from the rest of the United Kingdom. Similarly, since 2004 there has been a large influx of arrivals from the new EU accession states such as Poland, Czech Republic, Lithuania and Latvia, contributing to the recent growth of the population. Since 1997 Scotland has generally experienced a natural decrease in population, with an excess of deaths over births. In 2004, for example, there were 4012 more deaths than births, although for the last five years this process has been reversed with 4342 more births than deaths in 2008.

Compounding the problem of a declining and ageing population, Scotland is experiencing falling fertility and birth rates - a feature common to much of Europe. The ageing population sees the large numbers of people born in the post war period (1950s and 1960s) approach retirement. A common fear amongst commentators is the strain this could impose on the nation's resources, with a smaller working population being insufficient to support a high number of retirees and dependents.

In 2002, according to GROS, the number of live births in Scotland was the lowest ever recorded, at 51,270. This has however steadily risen, with 53,957 births recorded in 2004 and in 2008 the number of live births was 60,041.[2]

The Scottish Executive has responded to these demographic trends by setting up the Fresh Talent - Working in Scotland Scheme open to foreign (non-EU) graduates from Scotland's universities allowing them a 2 year residency period after graduation.

Within Scotland itself there is significant regional variation in patterns of population growth, with areas such as Aberdeenshire (1.1%), Edinburgh (0.9%), Clackmannanshire (0.8%) Falkirk (1.1%), Perth and Kinross (0.6%) and West Lothian (0.6%) seeing the largest increases in population between 2004 and 2005. Conversely Aberdeen City (-0.5%), West Dunbartonshire (-0.6%) and East Dunbartonshire (-0.6%) have seen the largest falls in population. The Highlands have also seen a significant rise in population over recent years, compared with the last 200 years, in which the area lost large volumes of people, due to persistently high rates of (forced) emigration particularly to places such as Canada, the United States, Australia and New Zealand.

In December 2005, GROS published a series of population projections which showed that Scotland's population was projected to rise between then and the year 2038, with both the numbers of births and deaths expected to drop. Immigration was projected to remain steady, positive and constant.

In January 2008, the GROS figures predicted that Scotland's population would rise to 5.37 million by 2031. Edinburgh's population could rise by 18%, while most other large Scottish cities would suffer a decline.

Edinburgh

As of 2006, the General Register Office for Scotland estimated that the City of Edinburgh council area had a resident population of 463,510. The 2001 UK census reported the population to be 448,624, making the city the seventh largest in the United Kingdom. The General Register Office also reported that this resident population was split between 220,094 males and 237,736 females.

The population of the greater Edinburgh area (including parts of Fife and the Scottish Borders) is 1.25 million and is projected to grow to 1.33 million by 2020. City of Edinburgh Council hopes this will continue to grow to 1.5 million by 2040, which is in line with the current average population of the three leading city regions in northern Europe: Stockholm, Helsinki and Oslo.

Though Edinburgh's population is ageing, a very large and transient population of young students studying at the city universities has helped to offset this demographic problem. There are estimated to be around 100,000 students studying at the various institutions of higher education in the city.

The birth rate in Edinburgh over the past 10 years has been fairly static around the 4,700 per annum. In 1999 the birth rate was 4.764 and in 2005 it was 4,691. In the first 3 months of 2008, however, there were 1,369 births recorded. This is higher that the corresponding figure for the first 3 months of 2007 (1,210) and, if the trend continues will see the birth rate approach 5,500 for the year. This will have a subsequent effect on the need for school places and affect the demographic averages. It is believed that a major contributory factor to this has been the large number of migrant workers (specifically Polish) living and working in the city.

The percentage of children has been dropping over the past 10 years from 16.31% in 1999 to 15.18% in 2005. Over the same period, however, the number of 16-19 year olds has remained fairly static and has grown slightly. In 1999 it was 22,500 and in 2005 it was just short of 23,000 (with a peak of 23,500 in 2003 and 2004).

The working age population percentage has increased since 1999 when the percentage was 65.94% to 2005 when it had risen to 67.81%. Over the coming years it is forecasted that this number will drop, whilst the numbers of people who are of pensionable age increases.

Over the period 1999 to 2005 the percentage of the Edinburgh population who are pensionable age has dropped from 17.75% to 17.01%.

One of the areas that has a big impact on both labour market statistics as well as support to the weak and needy of society is the number of people who provide unpaid care support. In the 2001 census there were almost 40,000 unpaid carers.

The economy of Edinburgh is largely based around the service sector, with tourism, financial services and banking being particularly important as well as education and high tech

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research. The city had been in good economic health since the arrival in 1999 of the Scottish Parliament, which had a so-called "headquarters effect", with many government departments being set up in the city, resulting in an increase in recruitment and employment, however the recent economic recession has impacted heavily on employment

Edinburgh's population is growing significantly, mainly through inward migration from overseas and, particularly the rest of the United Kingdom. This strong growth is, however, leading to pressure on the green belt, particularly in the west of the city as office and housing developments compete for space.

Edinburgh has a large metropolitan travel to work area which provides a pool of workers from as far afield as the likes of Glasgow, much of Fife, Stirling, Falkirk and towns in the Scottish Borders such as Galashiels and Peebles.

Edinburgh is the second largest financial centre in the United Kingdom after the City of London and the fifth largest in Europe and this sector has suffered substantial job losses over the past 12 plus months.
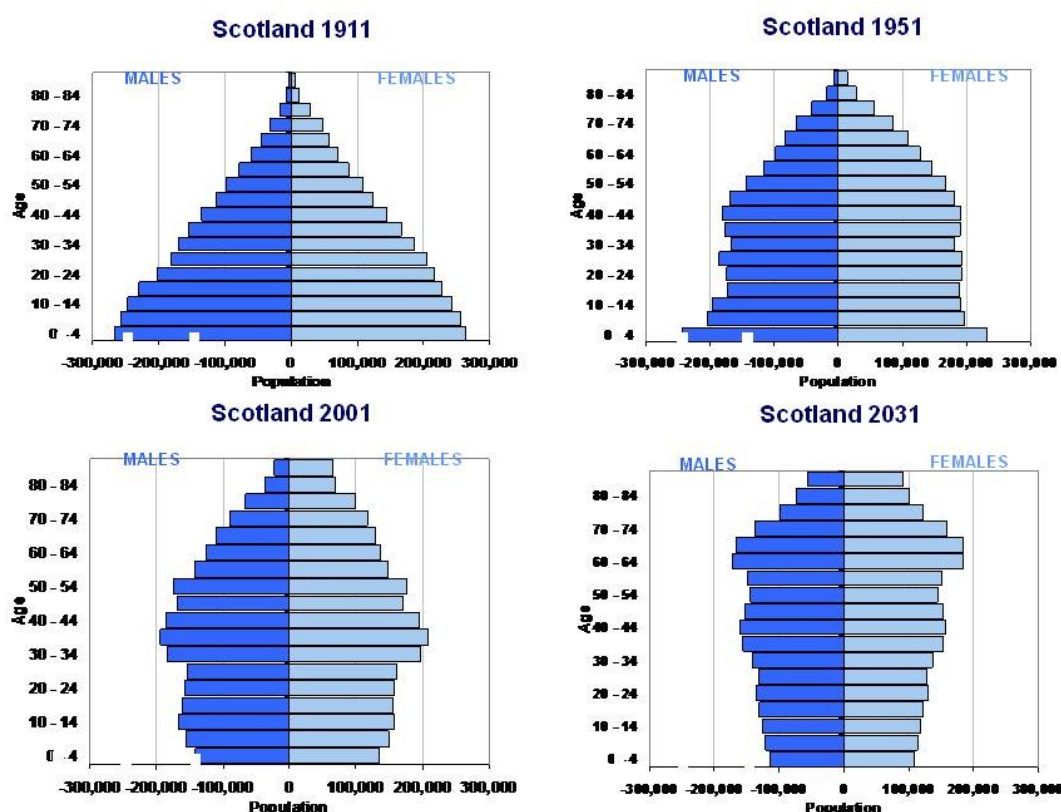
Age and the economy – A European Perspective

Age and the economy address constraints and opportunities more directly related to the labour market.
Key points highlighted by partners:

- Job quality (working conditions, health, wages, qualification) in a context of high unemployment and low overall labour demand
- Longer working life: policies targeted to increase participation and economic social nclusion of mature people and for active citizenship.
- Delay retirement age to improve the sustainability of pension and health care systems
- Enterprise development for the promotion of self-employment and the start-up of new enterprises

2. *Context*

"Older people face a range of work disincentives and barriers to employment. (….) The challenging task of lowering these barriers and disincentives to work is magnified by the legacy of public and private early-retirement schemes that have created an expectation of early retirement. Given the many factors at work, pension reform alone will not be sufficient enough to promote opportunities for older workers".

"Live longer, work longer"-OECD " 2006

The low employment of older workers in Europe represents a waste of individual life opportunities and social potential. For the economy has a whole, the increase in participation and employment rates of older workers are crucial for using the full potential of labour market supply to sustain economic growth, tax revenues and social protection systems, including adequate pensions, in the face of the expected reductions in the population of working age.

The promotion of active ageing is reflected in the two complementary targets that the EU has set itself:
- The 2001 Stockholm European Council agreed that half of the population in the 55-64 age group should be employed by 2010.
- The Barcelona European Council in 2002 concluded that a "progressive increase of about 5 years in the effective average age at which people stop working in the European Union should be sought by 2010".

Progress towards the Barcelona and Stockholm targets has been achieved, but it is not sufficient.

With the ageing and the coming shrinking of the working age population, older workers have to be recognised as a core component of labour supply and a key factor for the sustainable development of the European Union. Early retirement results in most cases in a premature and permanent loss of human capital. Policies are therefore essential to maintain supply and secure employability especially in periods of a major overall unemployment rate.

Member States need to develop and implement comprehensive active ageing strategies addressing the key factors for sustaining the employment of older workers; financial incentives to discourage early retirement, ensure access to training such as lifelong learning strategies and quality of wages and work conditions for a conductive job retention, flexible work arrangements (such as self-employment, part-time, career breaks, promoting entrepreneurship).

To implement the above-mentioned factors, social partners have a particularly important role to play to implement an active ageing strategy:

- A substantial postponement of the retirement age, in order to reduce the burden of the pensions costs and to increase total employment;
- An improvement of the physical condition of older workers and older people;
- The maintenance of pensioners incomes close to working people's incomes
- Involvement of retired people in social activities

Active-Ageing to strengthen social inclusion and the economy in the EU

Active-ageing strategy is an important component of the Lisbon Strategy, which includes the modernisation of the social protection system in the EU. Benefiting from the experience and know-how of older people could influence workplace attitudes towards ageing employees. In this way, this strategy can boost employment and productivity, which is needed from demographic challenge and to maintain a satisfying growth rate, which strengthen the financial basis of the welfare system. The best way to strengthen social cohesion is to increase the employment rate and maintain a high level of education and social activation. A high employment rate and staying on at work longer as well as reduction in long term unemployment are an effective way to combat social exclusion, which is one of the main target of the Lisbon strategy.

Incentive measures to postpone retirement age and reforming the pensions system in Europe will affect positively the welfare system of the EU Member States, that need to cope with the lack of workforce, maintain labour supply and secure employability. But the effective retirement age depends on the situation of the labour market and employment policies of companies. Active-ageing programmes should be launched before the reforms and because:

- There is a need of greater awareness of active ageing strategies on the part of both employers and employees
- The legislation against age discrimination in the workplace is important
- Active ageing strategies can be more effective than financial incentives for older workers.

Strengthening job quality and promoting lifelong learning

Good health and safety conditions at work are key conditions to prevent older workers exit from the labour market. Normally, the reasons why older workers leave their job is due to long-term illness or disability. This clearly points to the central role of health and safety concerns for the wellbeing of older workers and their ability to remain in the labour force. Fostering working conditions conducive to job retention, such as recognizing the special importance of health and safety at work as well as innovative and flexible forms of work organisation throughout the working life, including the provision of part-time breaks for elderly workers. This is part of the actions that Member States need to consider to implement an effective active-age policy. In fact, work ability maintenance is the active commitment and participation of different parties in the work community and workplace and their possible affect to health and safety at work and other workplace health promotion activities.

To boost job quality, lifelong learning and training for older workers plays also a major role: it is proved that poverty and social exclusion is mainly caused by low levels of education, unemployment, rural isolation. New forms of illiteracy towards ICT in professional and daily life exacerbate this exclusion . Active ageing policies need to consider as a priority the promotion of the access to training for all, regardless of age and developing lifelong learning strategies, in particular workplace training for older workers.

To raise employment rate towards older workers more flexibility must be introduced to foster job retention. Flexible forms of work organisation are another component of working conditions to improve an effective active age policy towards the labour market. First of all, retirement should become a process rather than an event, in which people decide to reduce their working hours progressively over time. Part-time retirement is an option that might be taken into consideration.

As workers become older, they should have the opportunity to fill the posts that best suit their intellectual and physical abilities and they should have the option to choose part time employment or a reduction in working hours.

Self-employment could also be considered as an alternative. National policies should also facilitate self-employment opportunities for older workers.

Conclusions

An effective active-ageing strategy needs to include:
- A postponement of the retirement age
- An improvement of the physical conditions of older workers
- Maintenance of pensioners incomes close to working people's income
- An improvement of anti-discrimination legislation for older people in workplaces

An employment focused active age policy needs important social consensus and strictly depends on the labour market situation in the Member State and the populations' homogeneity.
The introduction of more flexibility at work, high quality working conditions to help workers maintain their physical and metal health, lifelong learning to develop skills and promotion of a positive approach among employers to older workers is needed to raise the overall employment rate of mature people.

In the framework of these actions that need to be undertaken by Member States, combating age-discrimination in the workforce must become at the heart of Member State's employment strategies, going along with information campaigns to convince employers of the need to change their attitude towards older workers and stop discriminating them.
Active age must be seen first of all as a form of social inclusion and must be broader than only employment issues and the objective of getting older people back to work. A good policy of active ageing to boost employment cannot be promoted without other support activities such as volunteering, political commitment and civil participation of older workers into the society.

Scottish/Edinburgh Context

The number of younger workforce members is falling and the number of older members is rising. But the total does not change much.

As an example, the percentage of 15 – 29 year olds:
- 1927 – 1,369,915 (28% of pop)
- 1952 – 1,258,378 (25% of pop)
- 1977 – 1,186,595 (23% of pop)
- 2002 – 938,223 (18% of pop)
- 2027 – 770,661 (15% of pop)
- 1977-2002 -21%; 2002-27 -18%; 1977-2027 -35%

We have been through high decline but that was during working population growth period (1977-2002 TOTAL 15-64 YEAR OLDS +2%; 2002-2027 –12.5%).

Even if the working age population stays the same, an 'ageing' workforce is likely to have fewer people in the workforce actually working (and working full-time).

After State Pension Age the employment rates have been increasing in recent years (possibly affected by the tight labour market). Employment rates of those aged above SPA in Scotland (April-June):
- 1992 – 7.5 (GB 8.1)
- 2000 – 6.5 (GB 8.1)
- 2008 – 9.7 (GB 11.8)

Employment Rates 2008

Employment rate	Edinburgh	Scotland
Working age	76.1	75.6
Working age male		78.7
Working age female		72.3
age 16-24	53.9	60.8
age 25-34	83.9	81.2
Age 35-49	83.8	83.1
age 50-pension age	78.8	72.0

Annual Population Survey, Jan. – Dec.

Ageing of the population affects demand for services/good – health, services, pensions, saving rates, wealth distribution and so labour demand, but it also affects labour supply. The working age population does not fall much, but it does get older, so numbers of workers would fall if activity rates stayed the same. This probably means there is relatively less scope for Edinburgh to increase employment rates?
Although we have seen increased international in-migration tied in with reduced (national) inter-regional out-migration, the A8 countries are already severely ageing, so there is limited scope of increased A8 migration.

Characteristics of older workers in UK labour market (previous DWP data):
- 8.6 million people aged 50 to State Pension Age (SPA), 68% of whom are in employment, - 19% of the total working population
- Older workers (50-SPA) are more likely to work part time (25%)
- Older workers more likely to be self-employed (16%) compared to those 25-49 (11%)
- Average length of current employment is higher for older workers: 12.8 years compared to 7 years for those 25 to 49

3. Policies – national, regional, local

The majority of the commitments made in Opportunity Age have now been delivered. These include:

- Introduction of age discrimination legislation in employment and training, 2006; Equalities and Human Rights Commission 2007; and current Equalities Bill (Public Duty and Goods, Facilities and Services).
- Employment and benefits: reform of Incapacity Benefit – Employment and Support Allowance introduced, October 2008; Train to Gain introduced; a range of measures to improve work incentives, including changes to pension rules (e.g. working and receiving pension, pension deferral).
- Commitment to Lifetime Home Standards part of 2008 strategy "Lifetime Homes, Lifetime Neighbourhoods"
- Transport – accessibility planning introduced; free bus travel for over 60s introduced locally 2006 and then nationally 2008.
- Leisure activities – measures include free swimming for over 60s in over 80% of local authorities from April 2009.
- Volunteering in the Third Age programme concluded 2007.
- Care - "Our health, our care, our say" White Paper – 2006. Putting People First social care transformation programme - £500m for 2008/9- 10/11.
- Individual Budget pilots evaluation report published Oct 2008. Personalised Budgets to be rolled out nationally.
- New focus on tackling Pensioner Poverty: Pension Service established and then developed as Pensions Disability and Carers' Service, April 2008.
- Pilots of joined up working and preventative services (Link Age Plus and POPPS) completed and learning being rolled out.
- Stronger framework of governance: Cabinet Committee; Public Service Agreement 17 for the first time sets older people's wellbeing as a top Government priority

1.1	An ambition of an 80 per cent overall employment rate, including a million more older workers	• This ambition is now reflected in the PSA framework. The actions below all build towards achieving it.

1.2	Age equality in employment law in 2006, supported by the EHRC	• Age Discrimination legislation was introduced on 1 October 2006, banning discrimination in employment and training.
		• The Equality Bill introduced in April 2009 includes age as an equality strand in relation to the provision of services and the exercise of public functions. The Equality Bill will mean that:
		   - age discrimination will be banned in the provision of services and the exercise of public functions.
		   - better more responsive public services for older and younger people will be delivered through a new public sector equality duty. It will require public bodies to consider how their spending decisions, employment practices, and public services can help promote age equality and meet the particular needs of older people.

1.3	An improved Age Positive campaign to help change employer attitudes	• Be Ready was a 2 year campaign (2004-6) directly involving 60 lead business organisations in the promotion of information and guidance on age good practice in employment and preparing for the coming age legislation (passed in October 2006). A total of 1.4m employers were contacted. • The Age Positive team are working in close partnership with business lead organisations to develop and promote clear guidance and toolkits for employers on removing compulsory retirement ages and adopting flexible approaches to work and retirement. With industrial sector leaders we are developing sector models for encouraging older worker employment and the removal of compulsory retirement ages. We have started with transport and logistics, who have welcomed this approach, and will in the coming months roll this approach out to other sectors.

1.4	New pension rules to give incentives to stay in work	• The DWP's Extending Working Life programme continues to develop strategies to encourage people to continue working up to, and past, their State Pension Age. This will allow them to increase their income now and enable them to continue saving for their eventual retirement.
		• Many pension schemes have adopted terms that support flexible retirement and longer working, following tax rule changes in 2006 allowing people to carry on working while drawing from their pension. However DWP is also consulting with employer and pensions organisations on the further guidance many schemes are requesting from government to help them adapt their schemes in support of flexible retirement.
		• Other measures in place and proposed include:
		   - increasing the deferral rate for State Pensions to 10.4% per year and introducing the option of a lump sum instead of an increased weekly pension when it is eventually drawn;
		   - simplifying tax rules to allow, where pension scheme rules permit, drawing down of all or part of an occupational pension and continuing to work for the pension sponsoring employer;
		   - increasing the earliest age at which an occupational or private pension can be drawn from 50 to 55 by 2010;
		   - gradually increasing the women's State Pension Age from 60 to 65 between 2010 and 2020;
		   - increasing the State Pension Age by one year, over a two year period in 2024, 2034 and 2044, to eventually reach age 68 in 2046.

1.5	Better information and guidance so people can reskill and plan for later careers and retirement	• A Face-to-Face Pilot project has been completed and the outcomes are currently being evaluated to inform guidance offered to older workers. • Financial planning and saving for later life to ensure people have the means to fund their aspirations for later life. • A new Adult Advancement and Careers Service is currently being piloted with a view to national roll out by 2010, which will provide adults, whether they are out of work or in work, with guidance on skills, retraining and career opportunities.

1.6	Extending learning opportunities for older people so they can stay in work	- Train to Gain and other skills programmes introduced and effects on older workers regularly monitored. Train to Gain supports workers of all ages, to improve skills and employment prospects, labour market progression and social mobility. Key part of real help from the Government to people who are unemployed. - BIS support for Union Learning Fund and Union Learning Representatives (ULRs), achieved our target of training 22,000 Union Learning Reps (ULRs) over a year before the March 2010 deadline. On track to help over 250,000 people a year into learning by March 2010 (200,000 in 2008/09) many from hardest to reach groups and including 34,000 with poor basic literacy and numeracy skills. Evaluation in 2006 showed 36% of learners were aged 45 to 54 and 27% were over 54. - Giving employees the right to request Time to Train from their employers contained in Apprenticeships, Skills, Children and Learning Bill (legislation expected in force by 6 April 2010). Employers would be required to seriously consider, and respond to, all requests they receive. The right would be available to all employees who have worked for their employer for not less than 26 weeks and could be attractive to older workers who may not have previously considered training. - For those in employment the Government has expanded the number of Adult Apprenticeships available for people aged over 25. For those out of work we are putting in place new integrated employment and skills support by 2010 to help individuals return to and sustain employment. - Adult learners of any age continue to have access to literacy and numeracy courses free of charge and free tuition to take a first full level 2 qualification at a college or through their employer. New legislation will strengthen and protect these entitlements. - For the low-skilled and those with a poor experience of formal education, Informal Adult Learning can provide a way back and a stepping stone to further learning, qualifications and more rewarding jobs for people of all ages and backgrounds in every community.
1.7	Reform of Incapacity Benefit, helping people back into work	- Employment and Support Allowance (ESA) introduced Oct 2008, building on successful Pathways to Work approach. - ESA replaces Incapacity Benefit and Income Support, paid because of an illness or disability, for new claimants only. Customers who already receive Incapacity Benefit, will continue to receive it. ESA involves a new medical assessment called the Work Capability Assessment. This assesses what claimants can do, rather than what they cannot, and identifies the health-related support they might need. - ESA offers claimants personalised support and financial help, so that they can do appropriate work if they are able to. - It is intended that Incapacity Benefit recipients will move to the new benefit between 2009 and 2013. - From 2011 we will pilot Mandatory Pathways help for existing Incapacity Benefit claimants aged 50+ to find out what works best in helping them return to work.
1.8	New rights for carers	'Employers for Carers' was launched in January 2009 to ensure that employers have the support to retain employees with caring responsibilities. It promotes the business benefits of supporting carers and provides advice and support for employers on carer-friendly policy and practice. - The Work and Families Act 2006 extended the right to carers of adults to request flexible working from April 2007 with a duty on the employer to consider their request seriously. The definition of 'carer' will be reviewed, in relation to flexible working, once the impact of the current extension has been evaluated. An awareness-raising campaign began in April 2009 to coincide with the extension of the 'right to request' to parents of those aged 16 and under.

Some potential policy responses include increasing the size of the labour force through:

- increasing working life (raising pension age, tapered retirement, increasing lifetime average hours);
- employment policies for retaining older workers (e.g. attitude of employers; to training);
- Age Discrimination legislation
- Migration (especially international)
- Increasing activity rates
- Increasing productivity
- Managing decline, e.g. reducing health, welfare, pensions and income standards for future retirees (and others)

4. Guidelines

The Action Learning Set was drawn together on 26ᵗʰ May 2009 to brainstorm the issues regarding age and the economy. Prior to the meeting a briefing paper was circulated containing the underlying situation and how to work with the action learning set approach.

Amongst the areas brainstormed for further discussion and to develop the 2 areas to be selected were:

➢ Promotion of flexible working arrangements for older people within the public, commercial and voluntary/ community sectors
➢ Establishment of co-operatives and social firms for the employment of older people
➢ Ensure Edinburgh's employability strategies include the opinions, needs and wishes of older people.
➢ Pre-retirement issues for both employees and employers
➢ Re-skilling plan
➢ Older people offer through JU4J strategy

5. Problem analysis

Too often, population ageing has been seen in negative terms, with the emphasis on an increasing burden on health and social care services, rather than on the value that older people bring. We need to challenge current perceptions about ageing and at the same time promote a positive vision for the longer term, in which all generations can plan for and influence the way Edinburgh prospers.

Strengths	Weaknesses
-Edinburgh has a growing population which creates employment opportunities - Business is changing - With new businesses comes changing mind sets - The views of older workforce is changing (50 is the new 40) - Older workers have better work ethics - At 65, 38% of the workforce proposes to carry on working - Edinburgh's over 50's are the best qualified in the country, with more than a 1/3ʳᵈ being educated to at least NVQ level 4 - In 1900, the average Scottish life expectancy was 40; in 2004, it was just over 74 for males and just over 79 for	- Employers "want" young (cheap?) workers - Workforce demographics are changing - Many people over 50 face health and age-related barriers to work - Change to knowledge economy – need for constant upskilling - Few employers consider the impact of ageing workforce on their HR policies/rewards - Issues with pensioner poverty - UK employment policy formerly aimed at 25 to 49 age group - Older workers face barriers in finding and retaining employment and overcoming discrimination - By 2031 the number of people aged 50+ is

females	projected to rise by 28% and the number aged 75+ is projected to increase by 75%
Opportunities	**Threats**
- Migrant population leaving to return home - Lifelong learning opportunities - Age legislation (2006) helps - Opens up talent management opportunities and initiatives to promote active ageing - ¾ of senior HR managers say that attracting and retaining talent is no. 1 priority - Policy makers recognise importance of older adults - Employers are facing increasing competition for workers with the right skills and abilities - Edinburgh has introduced the national strategy on ageing (All Our Futures) and the city's joint plan for older people – A City for All Ages	- There has been a large influx of migrant workers from the new EU member states - Registered unemployment is falling - Technology has impact in terms of work available and skills required - UK Government proposing to abandon Incapacity Benefit and Income Support

From the discussion, and wanting to concentrate on attracting and retaining people in work longer, as well as ensuring we take account of the needs of older people, the following 2 key issues/problems were selected to be addressed through the Action Learning Set:

1. Promotion of flexible working practices for older people within public, private and 3rd sectors.
2. Establish a mechanism for older people's viewpoints to be fed into employability strategies

6. <u>Objectives, activities and targets</u>

6.1. Objective 1: Promotion of flexible working practices for older people within public, private and 3rd sectors

<u>Objectives identified</u>

- Better working practices incl. work/life balance;
- Opportunity for people to work longer through flexible working;
- Increased numbers of older people staying in employment or re-entering employment
- Chance for businesses to support older employers into retirement, whilst getting the best from them through succession planning

- Older workers better able to negotiate and cope with transitions

How the delivery of objectives organised and actions taken

- Based on previous programmes such as Age Positive Campaign and EQUAL programmes
- Development of best practice case studies
- Development of toolkit and how to use it (this toolkit will also contain advice on retirement & how to prepare for it)
- Development of promotional campaign for businesses showing business case
- Events for businesses (especially SMEs)

A full breakdown of the actions is contained in the action plan below

Resources (financial and human) required

ALS made up from City of Edinburgh Council and Edinburgh Chamber of Commerce - Led by Roger Horam.
Predominantly, without budget this means utilising spare time from Edinburgh Chamber of Commerce and academia, where available, unless additional funding can be sources
We will also involve academia (Queen Margaret University and Napier University). The managing authority were involved in the LSG and the selection of the major action points

Planned outputs

It is estimated that the main outputs of the action will be:
- Factsheets
- Case Studies
- Events to raise awareness – amongst individuals and businesses
- Reports on good practice

How will the results be evaluated?

There will be a number of evaluation methods used that will cover both qualitative and quantitative evaluation. Included will be:
- Rating systems
- Interviews
- Market research
- Market testing
- Sampling

Topic: Promotion of flexible working practices for older people within public, private and 3rd sectors					
Action	When will it be done?			What are the things we need to do to make this happen	Who is going to be responsible for making sure these things happen?
	Short-term	Medium-term	Long-term		
Work/Life balance					
Work/life balance - Research	By 31/3/10			Research online resources such as The Work Foundation (http://www.theworkfoundation.com), CIPD (http://www.cipd.co.uk), Work Life Balance (http://www.worklifebalance.com), and union sites, such as Unison (http://www.unison.org.uk/worklifebalance/index.asp) etc. The content of sites such as this will support the local development of: - Definitions - Making the case – benefits (both business and social) - Key messages – that can be used in awareness raising - Good practice ideas - Organisational drivers - Dimensions of work/life balance - The role of key actors - Legal aspects to consider	Edinburgh Chamber of Commerce will lead on this activity
Work/life balance – presentation to individuals		By 30/6/10		In order to let older individuals know about work/life balance we will need to use a number of media: - Internet – a website will be utilised. This is likely to be an existing site and will lead people through to other best practice sites - Newsletters – utilising newsletters that already exist to get the message out (initially through awareness raising), but also including dates and venues for any training that is available (by ourselves or other agencies) - Development of a leaflet covering the main aspects of work/life balance and including some short sharp case studies to get the	

				message home
				- Development of factsheets covering the key messages, good practice, drivers for, and dimensions of work/life balance - Development of training programmes
Work/life balance – presentation to businesses		By 30/6/10		In order to let older businesses know about work/life balance we will need to use a number of media: - Internet – a website will be utilised. This is likely to be an existing site and will lead people through to other best practice sites - Newsletters – utilising newsletters that already exist to get the message out (initially through awareness raising), but also including dates and venues for any training that is available (by ourselves or other agencies) - Development of a leaflet covering the main aspects of work/life balance and including some short sharp case studies to get the message home - Development of factsheets covering the key messages, good practice, drivers for, roles of key actors and dimensions of work/life balance
Work/life balance – development of factsheets		By 30/6/10		From the previous research carried out, downloadable and hard copy factsheets will be developed that cover the major aspects of work/life balance and contain: - Definitions and key facts - Rationale – either the business case or the rationale for the individual - Some good practice examples - Some positive case studies - Links to further information - Contact details to follow up
Work/life balance – development of			By 30/9/10	Case studies will be sought and developed to demonstrate work/life balance in action

Case Studies					
Age Management					
Age Management - Research	By 31/3/10			Research online resources such as the World Health site (http://www.worldhealth.net/list/news/longevity_and_age_management), the European Age Management Network, Eurofound - a tripartite EU agency - provides expertise on living and working conditions, industrial relations and managing change in Europe (http://www.eurofound.europa.eu) etc. The content of sites such as this will support the local development of: - Definitions - Making the case – benefits (both business and social) - Key messages – that can be used in awareness raising - Good practice ideas - Organisational drivers - Dimensions of work/life balance - The role of key actors - Legal aspects to consider	Edinburgh Chamber of Commerce will lead on this activity
Age Management – presentation to individuals		By 30/6/10		In order to let older individuals know about age management we will need to use a number of media: - Internet – a website will be utilised. This is likely to be an existing site and will lead people through to other best practice sites - Newsletters – utilising newsletters that already exist to get the message out (initially through awareness raising), but also including dates and venues for any training that is available (by ourselves or other agencies) - Development of a leaflet covering the main aspects of age management and including some short sharp case studies to get the message home - Development of factsheets covering the key messages, good practice, drivers for, and dimensions of age management - Development of training programmes	
Age		By		In order to let older businesses know about age management we will need	

Management – presentation to businesses		30/6/10		to use a number of media: - Internet – a website will be utilised. This is likely to be an existing site and will lead people through to other best practice sites - Newsletters – utilising newsletters that already exist to get the message out (initially through awareness raising), but also including dates and venues for any training that is available (by ourselves or other agencies) - Development of a leaflet covering the main aspects of age management and including some short sharp case studies to get the message home - Development of factsheets covering the key messages, good practice, drivers for, roles of key actors and dimensions of age management	
Age Management – development of factsheets		By 30/6/10		From the previous research carried out, downloadable and hard copy factsheets will be developed that cover the major aspects of age management and contain: - Definitions and key facts - Rationale – either the business case or the rationale for the individual - Some good practice examples - Some positive case studies - Links to further information - Contact details to follow up	
Age Management – development of Case Studies			By 30/9/10	Case studies will be sought and developed to demonstrate age management in action	
Retirement Planning					
Retirement Planning - Research	By 31/3/10			Research online resources such as Laterlife (http://www.laterlife.com/planning-retirement-in-laterlife.htm), DirectGov (http://www.direct.gov.uk/en/Pensionsandretirementplanning/index.htm),	Edinburgh Chamber of Commerce will

				Age Concern (http://www.ageconcern.org.uk/AgeConcern/info_guide_5.asp), the FSA (http://www.fsa.gov.uk/pubs/other/fincap/retirement.pdf) etc. The content of sites such as this will support the local development of: - Definitions - Making the case – benefits (both business and social) - Key messages – that can be used in awareness raising - Good practice ideas - Organisational drivers - Dimensions of work/life balance - The role of key actors - Legal aspects to consider	lead on this activity
Retirement Planning – presentation to individuals		By 30/6/10		In order to let older individuals know about retirement planning we will need to use a number of media: - Internet – a website will be utilised. This is likely to be an existing site and will lead people through to other best practice sites - Newsletters – utilising newsletters that already exist to get the message out (initially through awareness raising), but also including dates and venues for any training that is available (by ourselves or other agencies) - Development of a leaflet covering the main aspects of retirement planning and including some short sharp case studies to get the message home - Development of factsheets covering the key messages, good practice, drivers for, and dimensions of retirement planning - Development of training programmes	
Retirement Planning – presentation to businesses		By 30/6/10		In order to let older businesses know about retirement planning we will need to use a number of media: - Internet – a website will be utilised. This is likely to be an existing site and will lead people through to other best practice sites - Newsletters – utilising newsletters that already exist to get the	

				message out (initially through awareness raising), but also including dates and venues for any training that is available (by ourselves or other agencies) - Development of a leaflet covering the main aspects of retirement planning and including some short sharp case studies to get the message home - Development of factsheets covering the key messages, good practice, drivers for, roles of key actors and dimensions of retirement planning	
Retirement Planning – development of factsheets		By 30/6/10		From the previous research carried out, downloadable and hard copy factsheets will be developed that cover the major aspects of retirement planning and contain: - Definitions and key facts - Rationale – either the business case or the rationale for the individual - Some good practice examples - Some positive case studies - Links to further information - Contact details to follow up	
Retirement Planning – development of Case Studies			By 30/9/10	Case studies will be sought and developed to demonstrate retirement planning in action	
Recruitment offering to employers					
Recruitment offering - Research	By 31/3/10			Research online resources such as ACAS (http://www.acas.org.uk/index.aspx?articleid=801), Business Link (http://www.businesslink.gov.uk/bdotg/action/layer?topicId=1082249786), Wise Owls (http://www.wiseowls.co.uk/age_and_employment/index.php?page_id=123), 50+ Europe (http://www.50pluseurope.co.uk/new/english), People Management (http://www2.peoplemanagement.co.uk/pm/supplements/age) etc. The	Edinburgh Chamber of Commerce will lead on this activity

				content of sites such as this will support the local development of: - Definitions - Making the case – benefits (both business and social) - Key messages – that can be used in awareness raising - Good practice ideas - Organisational drivers - Dimensions of work/life balance - The role of key actors - Legal aspects to consider	
Recruitment offering – presentation to individuals		By 30/6/10		In order to let older individuals know about recruitment opportunities we will need to use a number of media: - Internet – a website will be utilised. This is likely to be an existing site and will lead people through to other best practice sites - Newsletters – utilising newsletters that already exist to get the message out (initially through awareness raising), but also including dates and venues for any training that is available (by ourselves or other agencies) - Development of a leaflet covering the main aspects of jobs for older workers and including some short sharp case studies to get the message home - Development of factsheets covering the key messages, good practice, drivers for, and dimensions of jobs for older workers - Development of training programmes	
Recruitment offering – presentation to businesses		By 30/6/10		In order to let older businesses know about opportunities presented by employing older workers we will need to use a number of media: - Internet – a website will be utilised. This is likely to be an existing site and will lead people through to other best practice sites - Newsletters – utilising newsletters that already exist to get the message out (initially through awareness raising), but also including dates and venues for any training that is available (by ourselves or other agencies)	

				- Development of a leaflet covering the main aspects of recruitment of older workers and including some short sharp case studies to get the message home - Development of factsheets covering the key messages, good practice, drivers for, roles of key actors and dimensions of recruitment of older workers.	
Recruitment offering – development of factsheets		By 30/6/10		From the previous research carried out, downloadable and hard copy factsheets will be developed that cover the major aspects of job and recruitment opportunities for older workers and contain: - Definitions and key facts - Rationale – either the business case or the rationale for the individual - Some good practice examples - Some positive case studies - Links to further information - Contact details to follow up	
Recruitment offering – development of Case Studies			By 30/9/10	Case studies will be sought and developed to demonstrate both good recruitment policies and good employment opportunities in action	

6.2. Objective 2: Establish a mechanism for older people's viewpoints to be fed into employability strategies

Objectives identified

- Understand the older people's opinions re employment
- Employment strategies reflect opinions of older people rather than being based purely on need and/or perceptions
- When older people feel they have a say, they are more likely to feel they belong and are listened to

How the delivery of objectives organised and actions taken

- Research what information we have from various representative bodies that can be used as a basis
- Establish forums (using existing groups) to gather information
- Collate information into papers for policy makers

Resources (financial and human) required

ALS made up from City of Edinburgh Council and Edinburgh Chamber of Commerce - Led by Roger Horam.
Predominantly, without budget this means utilising spare time from Edinburgh Chamber of Commerce and academia, where available, unless additional funding can be sources
We will also involve academia (Queen Margaret University and Napier University). The managing authority were involved in the LSG and the selection of the major action points

Planned outputs

It is estimated that the main outputs of the action will be:
- Factsheets
- Case Studies
- Events to raise awareness – amongst individuals and businesses
- Reports on good practice

A full breakdown of the actions is contained in the action plan starting on page 17.

How will the results be evaluated?

There will be a number of evaluation methods used that will cover both qualitative and quantitative evaluation. Included will be:
- Rating systems
- Interviews
- Market research
- Market testing
- Sampling

Topic: Establish a mechanism for older people's viewpoints to be fed into employability strategies					
Action	When will it be done?			What are the things we need to do to make this happen	Who is going to be responsible for making sure these things happen?
	Short-term	Medium-term	Long-term		
Research what information exists from various representative bodies that can be used as a basis for obtaining and feeding older people's viewpoints on employability through to policy makers	By 31/3/10			Develop a list of all the agencies that represent older people and that have older people on their group	Edinburgh Chamber of Commerce will lead on this activity
				Build a survey – online and hardcopy – that can be used to determine how older people want to communicate and be communicated with.	
Establish forums (using existing groups) to gather information		By 30/6/10		Establish forums containing representation from the various older people's groups	
				Develop a method for older people to voice opinions as individuals rather than just through representative groups	
				Develop mechanism – 2 way – for older people to communicate and be communicated with	
				Develop a timeframe of discussion areas	
Collate information into papers for policy makers				Set up system for information dissemination	

7. Resources and accessing funds

Active Age Sub Theme	Objectives	Funding Programmes	Funding Procedures	Timescales
Age and Economy	Promotion of flexible working practices for older people within the public, private and 3rd sectors	A City for All Ages	City of Edinburgh Council	To be defined
		Social Experimentation Application	VP2009/005	From Jan 10
		Match from Interreg IVB – Cities in Balance	Via Edinburgh Chamber of Commerce	In place
	Establish a mechanism for older people's viewpoints to be fed into employability strategies	Scottish Govt?	Funding to be sought	

8. Timetable

It is planned to try and complete this section of work by end September 2009 (i.e. within 15 months from starting)

Actions	Duration
Research	40 days
Presentations to individuals	15 days
Presentations to businesses	15 days
Development of factsheets	10 days
Development of case studies	10 days
Development of forums	50 days
Develop systems for information dissemination	75 days

9. Budget

With the majority of work being delivered in-house, the budget is kept deliberately low.

Expenditure Items	Total
Research	€12,000
Presentations to individuals	€4,500
Presentations to businesses	€4,500
Development of factsheets	€3,000
Development of case studies	€3,000
Development of forums	€15,000
Develop systems for information dissemination	€22,500
Total	€64,500