

Institution: University of Kent		
Unit of Assessment: 20: Social Work and Social Policy		
Title of case study: Developing the Fuller Working Lives Policy Agenda through Research-Based Professional Advice, Expert Testimony, and Stakeholder Engagement		
Period when the underpinning research was undertaken: 2004-2019		
Details of staff conducting the underpinning research from the submitting unit:		
Name(s):	Role(s) (e.g. job title):	Period(s) employed by submitting HEI:
Sarah Vickerstaff	Professor of Work and Employment	1984-2020
Period when the claimed impact occurred: 2014-2020		
Is this case study continued from a case study submitted in 2014? No		
1. Summary of the impact (indicative maximum 100 words)		
<p>The number of older workers in the labour market has grown substantially over the last few decades. In the UK, the number of those aged over 50 in employment has increased by over 20% since 1984 (UK Government, 2020). This change, coupled with the introduction of age discrimination legislation, has presented policy-makers, businesses, and employees with a range of challenges concerning the balance between the needs of workers for fuller working lives, and the requirements of businesses and organisations for recruitment, training, and succession planning. Professor Vickerstaff's research and impact activities have been instrumental in helping key stakeholders address these challenges by:</p> <ul style="list-style-type: none"> • Making a significant contribution to the evidence base used by policy-makers and stakeholder groups in their decision-making; • Working directly within Parliament and with a range of staff within UK Government departments to develop, reflect on, and implement national policy; • Helping to develop policy-associated implementation initiatives used by Government, employers, and workers. 		
2. Underpinning research (indicative maximum 500 words)		
<p>Vickerstaff's work on older workers and retirement transitions is internationally recognised as leading in the field. She was the PI on a series of research projects with colleagues at the University of Kent and from the universities of Bath, Edinburgh, Manchester, and Newcastle. The research was funded by the Joseph Rowntree Foundation, the ESRC, and the Department for Work and Pensions (and overseas funders for comparative projects). She has published her research widely in high-quality peer-reviewed journals.</p> <p>Vickerstaff's research over two decades involving employer-based case studies, individual interviews, and dataset work on the English Longitudinal Study of Ageing (ELSA) and the National Cohort Development Study (NCDS) has enriched our understanding of the factors that encourage or inhibit extended working lives. The in-depth qualitative work challenges notions that individuals simply 'choose' to work or retire, by showing the role of the employing organisation in structuring retirement options (Rowntree project 2001-2) [R1] [G1]. The research demonstrates that the complex impact of health and health pessimism (not only existing ill-health but also fear of ill-health in the future) structures action (Department for Work and Pensions research, 2006-8) [R2] [G2]. It focuses on the interaction of factors such as job</p>		

satisfaction, family, and work by locating the individual retirement decision in particular domestic contexts that structure and condition employment transitions (Department for Work and Pensions research, **2006-8**; ESRC project **2014-17**) [R3, R6] [G2, G3]. This has brought gender firmly back into the analysis, challenging the idea evidenced in much policy that older workers are a homogeneous group [R6, R4, R3].

Vickerstaff's 'Uncertain Futures' project (ESRC, **2014-17**) [G3], which forms the kernel of this impact case study, built on this earlier and deeply embedded work by further broadening our understanding of the impact of employers on extending working lives through five in-depth organisational case studies. It demonstrated amongst other results that since the passing of age discrimination legislation and the abolition of the default retirement age, employers have become reticent about talking to their employees regarding retirement for fear of appearing discriminatory. It also revealed that employees believe that no one can talk to them about retirement. These perverse and unintended consequences of policy are detrimental to both employer and employee. The research further evidences the enduring impact of gender and class inequalities on end-of-working-life opportunities and constraints [R4, R5, R6].

The research casts doubt on the ease with which flexible working or gradual retirement can be a panacea for encouraging people to extend their working lives. Employers in traditional male industries such as manufacturing and transport still see part-time work as relevant only in offices and retail and for women. For many women who already work part-time, it is not clear what further flexibility might mean. Perhaps most importantly, while many would like to reduce their hours in the run-up to retirement, for many lower-paid individuals it is simply not financially feasible [R6, R5, R3].

The case studies also demonstrated that ageism plays a complicated role in both limiting older workers' access to alternative jobs and in reducing some older workers' sense of entitlement to their existing jobs [R5].

3. References to the research (indicative maximum of six references)

[R1] Vickerstaff, S., Cox, J., and Keen, L. (2003). 'Employers and the management of retirement'. *Social Policy and Administration*, 37(3): 271-287. <https://doi.org/10.1111/1467-9515.00338>

[R2] Brown, P., and Vickerstaff, S. (2011). 'Health Subjectivities and Labor Market Participation: Pessimism and Older Workers' Attitudes and Narratives Around Retirement'. *Research on Aging*, 33 (5): 529-550. <https://doi.org/10.1177/0164027511410249>

[R3] Loretto, W., and Vickerstaff, S. (2015). 'Gender, age and flexible working in later life'. *Work Employment and Society* 29(2): 233-249. <https://doi.org/10.1177/0950017014545267>

[R4] Van der Horst, M., Lain, D., Vickerstaff, S., Clark, C., and Baumberg Geiger, B. (2017). 'Gender roles and employment pathways of older women and men in England'. *Sage Open* 7(4). <http://journals.sagepub.com/doi/full/10.1177/2158244017742690>

[R5] Wainwright, D., Crawford, J., Loretto, W., Phillipson, C., Robinson, M., Shepherd, S., Vickerstaff, S., and Weyman, A. (2019). 'Extending working life and the management of change: Is the workplace ready for the ageing worker?'. *Ageing and Society* 39(11): 2397-2419. <https://doi.org/10.1017/S0144686X18000569>

[R6] Lain, D., Airey, L., Loretto, W., and Vickerstaff, S. (2018). 'Understanding older worker precarity: the intersecting domains of jobs, households and the welfare state'. *Ageing and Society* 39(10): 2219-2241. <https://doi.org/10.1017/S0144686X18001253>

Grants (selected)

[G1] Joseph Rowntree Foundation, 2001-4. 'The Organisational Context of Retirement: the impact of employers' age management policies and practice on the process of retirement'. PI: Vickerstaff. Value: £60,000.

[G2] Department for Work and Pensions projects 2006-9: Trust and Confidence in Pensions; Employment Support for Carers; Encouraging Labour Market Activity. PI: Vickerstaff. Value: £217,916.

[G3] MRC/ESRC Lifelong Health and Wellbeing Extending Working Lives Consortium Grant, 2014-17. 'Uncertain Futures: Managing Late Career Transitions and Extended Working Life'. PI: Vickerstaff; 11 Co-Is across 9 institutions. Value: £556,557.

4. Details of the impact (indicative maximum 750 words)

Vickerstaff's research set out in sections two and three **[R1-R6]** has achieved impact in three distinct areas:

Working with Government departments to develop policy

Vickerstaff's research has identified her as a go-to person for Government departments with regard to developing policy in the area of extending or encouraging 'fuller working lives'. In **2014**, she was asked to proofread and comment on draft policy documents by a senior statistician from the Department for Work and Pensions (DWP), since she had 'done a huge amount of research cutting across the areas that we highlight in the document' **[a]**. This policy document, then entitled 'A Framework for Action: Extending Working Lives', was a foundation for later pivotal nationwide Government policies (Fuller Working Lives, 2014, revised in 2017) identified by MPs as 'the key Government policy on older workers' **[b]**. These have had significant implications for retaining, retraining, and recruiting the UK's growing older workforce, currently estimated at 32% of the labour force or 10 million people (Office for National Statistics, 2019). In particular, Vickerstaff's research is singled out by the DWP as informing policy regarding 'the extent of the use of available statutory instruments and the extent of the public and employer understanding of legislation regarding flexible working, as well as qualitative and quantitative insight to enhance understanding of the operation of the modern labour market following changes such as the Equalities Act, the removal of the default retirement age and the equalisation and increase of the State Pension Age' **[c]**.

Vickerstaff has been highly influential in ensuring that there are provisions in Government policy and strategy to encourage employers to positively engage with employees regarding flexible working, 'bridge employment', and succession planning. Furthermore, she has made a significant contribution to the evidence necessary to ensure that the Government adopts a nuanced approach that takes account of differences in the older labour force. As the Principal Research Officer at the DWP put it: 'via high quality research design, publishing findings relevant to policy and by engaging in debate and discussion with policy makers and government analysts the research impact of Professor Vickerstaff remains impressive, challenging, reliable and useful to inform the future of UK social and welfare policy' **[c]**.

Helping MPs to critically assess, reflect upon, and implement Government policy

Vickerstaff's research has also impacted on developing policy and Government strategy in Parliament. Her and her team's research and the findings from the 'Uncertain Futures' project **[G3, R3-R6]** have been extensively cited by Parliamentarians in key discussions of future policy regarding the best approach to the UK's growing older workforce. This includes five references to her work in **2017** by the House of Commons Women and Equalities Committee **[d]**; one reference to her research in **2018** in oral evidence from the Head of Diversity and Inclusion, Advisory, Conciliation and Arbitration Service **[e]**; and three references to her work in the House of Commons Women and Equalities Committee **2018** report on 'Older People and Employment' **[b]**. Examination of the Parliamentary discussion records **[d, e, b]** shows that her research played an important role both in terms of Parliamentary understanding and

with regard to garnering support for implementation measures of the 2017 'Fuller Working Lives' strategy, including ensuring 'adequate succession planning', dispelling the 'myth among managers and individuals that they are not allowed to talk about age, retirement or mid-career life alignments', and working towards a culture shift away from 'negative attitudes of leaders and line managers to flexible working'. It is worth noting that there is also direct reference to Vickerstaff's 'research from Kent University' when discussing devising policy driven implementation 'initiatives'.

In 2017, Vickerstaff was competitively appointed as a Specialist Adviser to the House of Commons Women and Equalities Committee Investigation into 'Older People and Employment' [b]. The brief of Vickerstaff's appointment was to help a group of 13 cross-party MPs assess whether the 'Government's Fuller Working Lives strategy is sufficient, whether the approach taken by the Government is working and what more needs to be done [...] and whether or not the Government's approach addresses the different needs of women, carers, people with long-term health conditions and disabilities and black and minority ethnic (BME) groups among the older workforce' [b]. Here, Vickerstaff's research-based activities moved beyond informing discussion and actions to a more instrumental impact. This included advising the Committee on whom to call to give evidence; devising questions for the MPs to ask witnesses; briefing the Committee before and after hearings; and involvement in drafting the final report and responding to the Government response to it. In addition, she submitted written evidence to the inquiry that underpinned recommendations in the final report with respect to the heterogeneity of older people, gendered ageism, and the constraints on flexible working. This work has had a material impact on helping Parliament reflect on, assess, improve, and implement the Fuller Working Lives policy.

Working with key stakeholders to develop policy associated implementation initiatives

Vickerstaff's impact activities have not only involved shaping policy at a high level. She has also worked with a range of key stakeholders to design implementation materials and initiatives on the ground. Working with the DWP, the Advisory, Conciliation and Arbitration Service (Acas), and Business in the Community (BiTC; a leading not-for-profit organisation appointed by the Fuller Working Lives Strategy Group as the Business Champion for Older Workers), Vickerstaff has helped design a video resource for employers about how to engage positively with older workers [f]; reviewed guidance brochures on age discrimination [g]; run workshops with a range of large business organisations regarding how to effectively implement the Fuller Working Lives policy [h, i]; and, shaped the development of 'products' such as the Government's mid-life MOTs initiative [i]. The latter is a practical process that encourages employers and employees to take an active role in planning for their futures with regard to work, finances, and wellbeing.

In sum, Vickerstaff has directly influenced a nationwide Government policy affecting a large segment of the labour force. She has made a leading contribution to the research base, worked directly on consultation and policy drafts, helped with the roll-out through practical initiatives such as mid-life MOTs, and assisted MPs and stakeholders to reflect critically on, and improve the implementation of, these policies. The breadth and expanse of Vickerstaff's impact far exceeds what can be captured here, and we would encourage assessors to read the key evidence statements from the DWP and Acas, which can only be summarised here. Vickerstaff's work has also been discussed extensively in the media with regard to enhancing public understanding and the take-up of Fuller Working Lives initiatives, including in the *Independent*, the *i*, the *Telegraph*, and the *Daily Mail*, as well as on BBC Radio 4's *Money Box* [j].

5. Sources to corroborate the impact (indicative maximum of 10 references)

[a] Email: 2014 email from senior statistician at the Department for Work and Pensions asking Vickerstaff to review draft policy documents based on recognition of her research.

[b] 2018 UK Parliament House of Commons Women and Equalities Committee publication. Paragraph 6 sets out that the Fuller Working Lives strategy embodies the key Government policies on older workers. Paragraphs 31, 55, and 56 reference Vickerstaff's research in the Committee's report. Paragraph 11 references Vickerstaff's appointment as a specialist adviser, demonstrating her pivotal role in advising the MPs in their inquiry. Paragraph 10 sets out the brief for the inquiry to which Vickerstaff is special advisor.

<https://publications.parliament.uk/pa/cm201719/cmselect/cmwomeq/359/35902.htm>

[c] Testimonial: 2020 letter from the Principal Research Officer at the Department for Work and Pensions, stating the significant and wide-reaching impact of Vickerstaff's research and activities on policy development.

[d] Oral evidence by witnesses to the House of Commons Women and Equalities Committee in the investigation of older people and employment: Oral Evidence HF9, 13 December 2017; see Qs. 8, 14, 17, 22, and 38 for references to Vickerstaff and the ESRC 'Uncertain Futures' project that she led.

<http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/women-and-equalities-committee/older-people-and-employment/oral/75708.html>

[e] Oral evidence from the Head of Diversity and Inclusion, Advisory, Conciliation and Arbitration Service, 2018; see Q. 89.

<http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/women-and-equalities-committee/older-people-and-employment/oral/76656.html>

[f] Video posted on the Department for Work and Pensions YouTube channel aimed at employers (2018), and copy of email to Vickerstaff requesting the initial development work on the video. 1,919 views when extracted.

<https://www.youtube.com/watch?app=desktop&v=DgTq5NTKIHU>

[g] Email from the Advisory, Conciliation and Arbitration Service, requesting Vickerstaff to work on age discrimination materials, 2018.

[h] Email from the Department for Work and Pensions (2017), copied to a range of attendee stakeholders, regarding Vickerstaff's impact at a workshop on implementation initiatives related to the Fuller Working Lives policy.

[i] Testimonial letter from the Director of the Advisory, Conciliation and Arbitration Service and the Ageing Society and State Pension Directorate at the Department for Work and Pensions, 2017.

[j] Vickerstaff's media activities regarding enhancing public understanding and take-up of Fuller Working Lives initiatives, including a talk on BBC Radio 4's *Money Box*, and articles in the *Independent*, *i*, *Telegraph*, and *Daily Mail* (2017-18).