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Timetable, Minutes, Key Decisions & Action Points: i~work

Deadline	What we need	Why	Where's this going	Who's responsible
Thurs Feb 14	Lit review - 250 words with citations + research questions	Justifying our approach, gaps in knowledge	Case for Support scene-setting	Camb, RCA, Notts & Surrey
Mon Feb 18	Sentences on health data sources for WP1		Case for Support methods	Notts & Surrey
Mon Feb 18	Clarification of methods -	participative development of risk-assessment tools & mental models approach	Case for Support methods	Surrey & HSL
Mon Feb 18	More on WP3	To clarify knowledge exchange processes	Case for Support communications plan	Warwick, ILC-UK, HSL & TAEN
Wed Feb 20	Updated CVs	Details of projects with grant no., title & brief description	Case for Support track record	All partners
Wed Feb 20	Review role of each non-academic partner	To ensure each has a distinctive role in our programme of work	Letters of support - may need more or revisions	Camb, RCA, Notts, Warwick & HSL - re non-academic partners
Thurs Feb 21	First draft of Full Case for Support	For circulation for critical review	Critical friends, advisers, non-academic partners	Kerry to dispatch to core partners
Thurs Feb 21	List of tasks for each researcher by institution	To construct Gantt chart & justify RA resource	Justificaton of Resources + Gantt	Camb, RCA, Notts, Surrey, Warwick, HSL
Wed Feb 27	Risk-assessment tool	To give commissioning panel confidence in our proposal	Annex	Warwick & HSL - Julian to supply template
Fri Feb 29	Revised costings for each institution	Changes to travel and other costs in light of revisions to proposal		Warwick to dispatch to academic partners & collaborators
Mon Mar 3	Ethical statements	Demonstrating we've discussed cross-cutting ethical issues	Ethics annex	Camb, Surrey, RCA, Notts & Warwick
Wed Mar 5	Diagram showing hierarchy of factors influencing choices of WP2 case sites	Step-by-step rationale showing inter-section of labour market supply & demand factors	Annex	Warwick - Robert
Wed Mar 5	Road map of our methodology	Clarifying the integrated structure	Annex	Camb - John
Wed Mar 5	Gannt chart	Our timetable	Annex	Camb - Terry & Pat
Wed Mar 12	Final draft of Full Case for Support			
Wed Mar 19	Submission			

Core Network Meeting, Thursday, February 7, 2008**, Friends House, London**

Attended by:
Peter Buckle, University of Surrey
Amanda Griffiths, University of Nottingham
Jeremy Myerson (am only) & Jo-Anne Bichard, RCA HHC
Robert Lindley & Kerry Platman (Chair), University of Warwick
John Clarkson & Pat Langdon, University of Cambridge
James Lloyd, ILC-UK (am only)
Julian Williamson, HSL

Apologies:
Beate Baldauf, University of Warwick

This is a distillation of our discussion and includes action points [which replace those listed in the document distributed at the meeting, i~work document 26-1: priorities for full proposal].

The brutal statement of what we're about

A suite of instruments, tools, methods, frameworks and guidelines which examine the physical and psychological fit between work environments and individual capacities in order to extend working lives.

A single, powerful, multi-disciplinary engine which addresses capability, health, psychological, ergonomic and aspirational aspects of ageing in employment. This links policy objectives with business drivers in order to offer a range of tools with wide applicability, delivered through engagement and knowledge transfer partnerships.

We need to frame inclusivity better. By inclusive work, we mean….
Action: Kerry (Warwick) to do a first draft for Full Proposal

Deliverables (capsule/box of chocs/penknife)

Broad deliverables:
- Assessments of sectoral and occupational priorities for intervention based on the confluence of labour demand and supply, using demographic, gender, skills and health data
- Instruments which address access to work issues, ensuring that jobs and tasks are within individual capabilities
- A new risk-assessment tool which identifies work-related hazards in relation to the ageing workforce
- Guidelines on how to motivate, manage and retain mature workers based on a fuller understanding of people's aspirations and of what encourages people to stay or go in later years
- A decision framework which allows organisations to examine the trade-off between adapting work settings and jobs, or re-deploying and retraining individuals – helping managers to make more informed decisions
- A research-led, strategic message based on convergent findings, targeted at business and organisational decision-makers (the enablers), middle/line managers (do-ers), and employer representatives and professional intermediaries (facilitators/change agents)

- Identifying the priorities for change and making recommendations as to how this can be achieved in order to empower individuals to seek and gain adaptations to their working environments in order to improve the quality of longer working lives
- To influence perceptions of ageing in the workplace, so that to be older is normal rather than exceptional or deviant
- To address the apparatus of employment, i.e. structure of employment, to enable individuals to exert more control and agency in the employment relationship
- A process for developing multi-disciplinary intervention

Specific deliverables:
- Case study vignettes detailing why organisations lose older workers
- Guidance for retaining older workers which is relevant to divergent sectoral and occupational clusters
- Stereotypical older worker personas which address discriminatory attitudes and behaviours through the use of video
- Accounts from older workers on what desirable work looks like
- Health outcome forecasts which map sectoral and occupational issues by age
- A portfolio of design-led solutions which address work environmental issues, such as lighting, furniture, computing accessories
- Using financial measures to justify intervention and change, and tailoring these to organisational settings, i.e. using shareholder value, financial impact, corporate social responsibility, and equity measures, based on the most appropriate measures for the setting

Gap in our knowledge

The problem with past research is its narrow focus, with architects and designers operating in isolation etc. Existing models are age-free.

Action: Cambridge, Surrey, Notts, HSL & RCA to supply paragraphs for scene-setting/lit review of no more than 250 words, with citations, which is specific to our proposal. Please include specific research questions. DEADLINE: THURSDAY FEB 14

Research methods

Hour-glass programme design: broad (WP1), narrow (WP2), broad (WP3)

Methods: WP1

Aims:
- to provide a trends analysis by reviewing predictions, assessments and patterns by occupation and industry using the 27 Sector Skills Council territories/clusters
- to provide an economic & health-based rationale for the selection of work settings, occupations and industrial sectors for WP 2

Time scale: 6 months (Nov 2008 – April 2009)

Deliverable: 'Priorities for Action' report which understands the demand for inclusive approaches and identifies critical scenarios for i~work endeavours

Methods: super-imposing the health data on the Sector Skills Councils labour market forecasting data. First step in work programme is to assess overlaps and mismatches between classification systems for occupations, sectors, industries, jobs and work types used by different data sources. Our data sources are:

1. Working Futures III
Warwick Institute for Employment Research forecasting work for SSDA/LSCs
UK sectoral forecasts to 2016

2. UK Labour Force Survey
Self-reported ill-health by occupation

3. ELSA – English Longitudinal Study of Ageing
- demographics, retirement
- job change, current work activities, income
- self-reported general health, health-related job limitations, cognitive function, psychosocial health
- anthropometric measures (physical performance), effort and reward, life satisfaction (including control at work)

4. THOR
Compilation of national voluntary occupational health surveillance schemes in UK (since 2002)

5. RCGP (Royal College of General Practitioners) Morbidity Unit data set

6. Health & Safety Executive stats

Notts & Surrey to provide more details of how we should use sources 3-6. Warwick (Beate) to help with ELSA and send info to Notts (Amanda). Peter, you mentioned another data source from a Surrey colleague??
DEADLINE: MONDAY FEB 18

Surrey to provide sentences on participative development of risk assessment tools for methods section. HSL (Julian) to do same for mental models approach.
DEADLINE: MONDAY FEB 18

There may be opportunities for us to draw on NDA CRP outputs from earlier rounds, e.g.:
- David Blane, Imperial College: Transitions, Choices & Health at Older Ages: Life Course Analyses of Longitudinal Data (Programme Grant)
- Mike Murphy, LSE: Modelling Ageing Populations to 2030 (MAP2030) (CRP Grant)

Sampling frame:
Action: Warwick (Robert) to construct a diagram which plots our decision-making matrix over the choice of 20 preliminary case study sites based on sectoral, occupational, labour demand (skills needs & market opportunities) and labour supply (workforce availability & health factors) issues, plus other considerations (large vs SMEs etc).

We're looking for generic exemplars which privilege certain dimensions over others. We want an example of each combination of characteristics which seem to matter.
DEADLINE: WED MARCH 5

Labour demand		Labour supply		
Skills needs	Market opportunities	Workforce availability	Health factors	Other
Sector size (of labour force)	%GDP	% workforce aged 45+	Morbidity	Large vs SME
Skills shortages: current & predicted	Productivity gains	% workforce aged 55+	Incapacity benefit statistics by occupation	Private/public/voluntary
No. new jobs - expansion demand	Technological innovations	Retirement rates	Self-reported ill-health by previous occupation	Gender & ethnicity
Replacement demand (retirement & mortality)	Business creation	Occupational mobility		Full-time/part-time
Hard-to-fill vacancies	Relative productivity (international benchmarks)	Training needs		Inward migrant labour/ off-shoring

Warwick to do more work on the 'bubble charts' in order to submit as an annex.

Methods: WP2

Phase One: Understanding professional practice & understanding the business case

Duration: 6 months (May – Sept 2009)

Research questions:
- What have you considered so far?
- What have you been doing about job deployment or lifelong learning?
- Why is XXX not appropriate in your work environment?
- Needs of board & line managers
- How information and support should be delivered

Semi-structured interview schedule for one-to-one interviews & focus groups: what are the current discourses? This is a scoping exercise using a unified, collaborative interview schedule, with prompts, hypotheticals etc covering a spectrum of issues about the working environment.

2 researchers per site
2 days of interviews
20 sites, based on WP1 rationale
Interviews recorded and selectively transcribed
Interviewees: line managers, employers, worker representatives, HR personnel, ex-personnel?, workers? A slice through the work environment.

Devise common protocol for access, engagement, fieldwork, analysis and integration.

Business Information Kit for prospective case study sites, detailing:
- Scope of study
- Issues for discussion
- Extent of their participation
- Expected outcomes

Post-meeting to:
Review findings & explore convergence

Outcome: consolidated report across targeted sectors which capture professional discourses on:
- Barriers to change
- Opportunities for change
- Current practice & awareness
- Attitudes and perceptions of relevant issues
- Understanding business decision-making processes

Phase Two: Developing the practical response

Duration: 18 months (Nov 2009 – April 2011)
Preparatory work: 6 months (now part of Phase One)
Fieldwork: 3 months
Analysis: 12 months
Post-fieldwork: 3 months

Rationale for selection of 10 of these sites for more in-depth case studies based on:
- Sites where we have the most potential for learning
- Where there are more issues to consider, thus where learning opportunities can be maximised
- Sites where there is potential to introduce change and have a business impact

Action: Camb (John) to draw a diagnostic road map of our methodology
DEADLINE: WED MARCH 5

Methods:
- Partners to deploy methods most appropriate for the site, given understandings and challenges identified in Phase One
- We'll use our stock-in methods, developed by respective institutions and investigators from home disciplines

Example: Surrey's methods for developing a risk assessment tool
- Asking if current risk assessment tools have any validity for older workers
- Evaluating how work is done
- What are the experiences of applying risk assessment tools
- Documentary evidence: org policy & procedures, accident & health data

Action: Surrey to send paras on methods for the participative development of risk-assessment tools
Also, HSL ditto on mental models approaches
DEADLINE: MONDAY FEB 18

Case study methodology
Saturating the site using multiple methods - the most appropriate to the specific work environment & business case
Building a comprehensive picture using tools from range of possible methods that are flexibly deployed to meet the requirements of the research questions & the idiosyncrasies of specific fieldwork site
Emphasise user-engagement and co-authorship of research in Phase Two.

HR practices and business case issues addressed by:
- Face-to-face interviews with senior managers & chief execs
- Assessment of HR policies & practices
- Skills market and labour force analysis

Health issues addressed by:
- Stress-correlate testing
- Health interviews
- Focus groups
- Site statistics

Inclusive design issues addressed by:
- Work Capability-demand audits
- Sensitivity analysis for re-design

Workplace design issues addressed by:
- Probe & provocation methods
- Ethnographic study & user diaries
- Visual evidence
- Integrated methods
- Work-based survey
- Ethnography of site
- Site systems analysis: inter-relationships & logistics

Pre-meeting to define:
- Specific research question related to needs of site
- Project plan for site & protocol

Data collection & discipline-specific analysis

Post-meeting to:
- Review findings & explore convergence
- Develop interventions based on findings
- Prepare feedback for case study site

Return to field to discuss response to suggested interventions with users e.g. business managers, logistics managers, workers reps, health & safety staff

Tasks for each site: bottom up approach where we justify the resources for each researcher.
ACTION: CAMBS, NOTTS, SURREY & RCA TO SEND LIST OF DUTIES FOR RAs TO BE USED FOR COSTINGS, JUSTIFICATION & GANTT CHART.
DEADLINE: THURS FEB 21

WP 3

Duration: 36 months (Nov 2008 – Oct 2011)

Action: Warwick, ILC-UK, TAEN & HSL to flesh out section of proposal on engagement & knowledge transfer
DEADLINE: MON FEB 18

Outputs - ideas

6 months in, a delayed launch with multiple stakeholders: government, industry, agencies. Getting communities together and networking. Get sponsorship.
An 'Include' type conference. Trend-setting, business breakfast, workshops, plenary papers, interview-style discussions, 24-hour challenge.

Partners

Action: Review role of each partner in light of changes to Full Proposal
Seek feedback and comments from Full Proposal, where appropriate
Clarify role of partner, possibly with more specific Letter of Support
DEADLINE: WED FEB 20

Confidence-building

Team hasn't come together before, although parts have. We know the issues. We're multi-functional.
Risk assessment of project – annex. Use HEFCE and HSL formats
Action: Julian to send HSL/HSE template
DEADLINE: WED FEB 27

Value for money

Emphasise what we bring which is free i.e. existing projects which feed into the NDA.
Ensure that our outputs are numerous, clear and compelling.
Make a statement about the budget: it's a product of having 5 academic partners
We will be active in seeking additional resources
Studentships will be deployed at our own cost

Costings: Institutes to get approvals now, especially Surrey which has a one-month lead time.

DEADLINE: WARWICK TO DISPATCH REVISED COSTINGS BY FRIDAY FEB 29

Other Sections

Annexes

Gantt chart –
ACTION: Cambridge to supply
DEADLINE: WED MARCH 5

Ethical issues

Action: partners to send ethical statements relevant to their discipline, institution & research approach
DEADLINE: MON MARCH 3

Specification asks us to:
- Confirm that consideration has been given to ethical issues
- Explain what kind of ethical approval would be sought if the proposal were to be funded
- Explain how our research would meet key ethical principles

CVs & track record

Action: Core partners to update their cvs electronically and send to Kerry. Maximum: 2 pages in 12 font.
Action: Academic partners to list relevant and related research projects by institution and co-investigator for the Case for Support section on our track record
- Grant number
- Title
- Brief description
DEADLINE: WED FEB 20

Other support

We are asked to provide details of support sought or received from other sources for our research in the same field in the past three years.
Co-investigators to supply this for Kerry to complete on the Je-S form.

Related proposals
We are asked to provide details of previous applications to and grants from Research Councils
• If your application under this scheme is related to any proposals previously submitted to any of the 5 Research Councils involved (ESRC, EPSRC, BBSRC, MRC or AHRC) including resubmissions (i.e. it is similar in its aims, objectives and methods to an application previously submitted, to any of the Research Councils listed above, by any member of the team of Investigators), you must detail the appropriate related proposal and its relationship here.
• This section should also detail the reference numbers of any support sought from the Research Councils in the past five years.
Co-investigators to supply this for Kerry to complete on Je-S.