



EXPLORING AN EXTENDED WORKING LIFE FOR TEACHERS

- A qualitative study

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Level:	Second Cycle
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Supervisor:	Karin Allard
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Abstract

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Keyword: HRM, age management, extended working life, retirement, retention, teachers.

Purpose: The purpose of the present study is to explore the possibility of an extended working life for teachers and to understand how organisations can work to encourage an extended working life for teachers.

Theory: In the present study, the analytical framework includes two concepts to understand both the present and possible HR policies and practices for encouraging an extended working life. First, to analyse the present HR practices and policies targeting older teachers, the framework developed by Taylor & Walker (1998) for analysing the employer approach to older workers has been applied. Second, to understand the drivers for an extended working life among teachers and how organisations can work to encourage an extended working life, the concept of push, pull, stay, stuck and jump factors has been applied (Shultz et al., 1998; Stattin, 2009; Andersen & Sundrup, 2009; Jensen, 2005).

Method: The study adopts a qualitative research design using semi-structured interviews. In total, 14 interviews have been performed with 6 older teachers (55 years or older), 4 principals and 4 HR professionals from two organisations from the public sector.

Result: The result shows that there are no formalised HR policies targeting older teachers in neither organisation. The lack of formalised HR policies targeting older teachers suggests that the organisations have not adopted a strategic approach towards their older teachers. However, principals have developed their own practices for how to manage and retain older teachers, indicating that there is a need for HR policies targeting older teachers. Further, the older teachers shared that they find retirement attractive since they want to spend their time on other things, except for working. To encourage an extended working life, it would be necessary for organisations to make adjustments for older teachers and to make it more attractive for teachers to stay, rather than retire. Based on the results from the study, this can be done by providing flexible work schedules, redesigning work tasks to be more appealing and providing financial incentives to continue working.

Foreword

I would like to express my gratitude to all respondents for their contribution to this study and for taking their time to participate. Thank you all for making this thesis possible by sharing your stories and experiences. In addition to this I would also like to thank my supervisor Karin Allard, for providing me with valuable support and feedback throughout the whole process of writing this thesis.

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Malin Albihn
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Introduction

The Swedish population is one of the oldest among the OECD member countries and it is predicted that in 2030, one in four will be over 65 years old (OECD, 2003). To handle the social and economic challenges of the ageing population, the Swedish government agreed in 2017 to update the present pension system (Government of Sweden, 2017). The aim with the agreement has been to secure and raise the pensions in the long term and one part of this agreement includes to gradually extend the legislated retirement age (Government of Sweden, 2017).

One major concern for organisations connected to the demographic changes is the issue of labour and competence shortage, something that has been known for a long time. In their report from 2010, the Swedish Public Employment Service (2010) reported that Sweden was facing a generation shift within the next 15 years that would result in a retirement rate that would exceed the number of workforce entrants in the years to come (Swedish Public Employment Service, 2010). This generation shift would result in an overall labour shortage in the Swedish labour market where the public sector would be especially affected, with a large number of retirements within the teaching profession (Swedish Public Employment Service, 2010).

In the present thesis, focus will be on the extended working life of primary school teachers since there is a large shortage of primary school teachers in Sweden today (SCB, 2017). Further, as a result of large number of retirements and an increasing number of children in the school age, the demand for teachers is estimated to increase with 20% until 2031 (SCB, 2017). According to SALAR, (2018) to meet the needs of teachers it will not be sufficient enough to focus on educating more teachers, the way schools work with competence supply will need to be developed as well.

Extending the working lives of teachers is one strategy to retain teachers presented by the SALAR (2018). According to SALAR, (2018) the average retirement age in Swedish municipalities is 64 and if the average retirement age was gradually postponed with two year by 2026 the need to recruit teachers would decrease significantly. This indicates that encouraging an extended working life could be one solution to deal with the teacher shortage. There are studies suggesting that the interest among older workers to extend their working lives is increasing, as long as it is possible and if the conditions are favourable (Future Commission,

2013). According to the Future Commission (2013), only 10% of Swedish employers have a strategy for retaining older workers. To address the scarcity of labour and skill shortages in the future it is important for employers to encourage an extended working life by developing strategies and adopting workplace practices to retain older workers (OECD, 2006; Future Commission, 2013).

When it comes to the development and implementation of strategies targeting older workers, previous research has presented and described several HR practices that are of importance for organisations to have in place to retain older workers (Armstrong-Stassen, 2008; Claes & Heymans, 2008). However, little is known about how to develop and implement HR practices targeting older workers in practice (Armstrong-Stassen, 2008). Furthermore, previous research has argued for the importance of managers when it comes to the implementation of HR practices targeting older workers (Ilmarinen, 2005; Armstrong-Stassen & Schlosser, 2010). Despite this, only a few empirical studies have asked managers about their role in the implementation of HR practices targeting older workers (Furunes, Mykletun & Solem, 2011). In addition to this, no studies focusing on the role of HR in Swedish schools have been found.

From reviewing the literature on an extended working life it is clear that older workers, managers and HR professionals are the most important actors in the organisation when it comes to the development and implementation of HR practices targeting older workers. Despite this, there is a lack of empirical studies reporting findings from all these perspectives. The present thesis will fill the research gap regarding HR practices targeting older workers by including the perspectives of teachers, principals and HR professionals.

Purpose and research question

The purpose of the study is to explore the possibility of an extended working life for teachers. The aim is to understand what HRM strategies and HR practices targeting older teachers organisations have in place and what HRM strategies and HR practices can be developed to encourage an extended working life. This is accomplished by examining the present HRM strategies and HR practices targeting older teachers within the studied organisations and how these practices are perceived by HR professionals, principals and teachers. In addition to this, the study will explore the perceptions HR, principals and teachers have regarding the possibility of an extended working life. The research questions are presented below.

- What approach do organisations have towards older teachers and how do they work to extend the working life of teachers today?
- According to HR professionals, principals and teachers, how can organisations work to encourage teachers to extend their working life?

Setting of the study

In this section the Swedish pension system in regards to the extended retirement age is presented. Further, a brief description of the Swedish school system is presented followed by an overview of the present situation of teacher shortage in Sweden.

The Swedish pension system

In Sweden, the individual has the possibility to decide when to retire, however, to be entitled the public pension you have to be at least 61 years old (Government of Sweden, 2017). According to the Swedish law on Employment Protection Act (Lagen om anställningsskydd) the individual does not have the right to remain in employment after 67 years of age, then the employer has the right to terminate the employee (the Swedish Parliament, 2014). Prior to the present pension system that was introduced in 1999, the statutory retirement age in Sweden was 65 (OECD, 2003). As for today, there is no statutory retirement age in Sweden but according to the Government of Sweden, (2019) there is a strong norm in the Swedish society that the normative retirement age is 65.

With the aim to extend the retirement age and to ensure higher, more secure and sustainable pensions in the future, the Swedish parties responsible for the pension system reached an agreement in 2017 to gradually raise the legislated retirement age (Government of Sweden, 2017). In line with the agreement, a proposition was submitted for referral in February of 2019 and will later be submitted to the Swedish Parliament (Government of Sweden, 2019). The proposition suggest that in 2026 the lowest age for being entitled public pension will be 64 while the right to remain in employment will be raised to 69 by 2023 (Government of Sweden, 2019).

The Swedish school system

The Swedish Parliament and the Government of Sweden are responsible for setting the framework for the Swedish education through laws and regulations. In addition to this, they design the curriculum and decide the knowledge requirements. Each municipality is the head of the public schools with the responsibility to make sure that pupils achieve the knowledge requirements and to ensure that regulations are applied correctly. In addition to this, the head decides how the school should work and is responsible for improving the school. Each principal is further responsible for the quality and results at their school. Their responsibilities also

include managing teachers and other personnel while providing a safe environment and to make sure that pupils are offered the right support to reach the knowledge requirements (The Swedish National Agency for Education, 2019).

The issue of teacher shortage

In their report, the Swedish Teachers' Union (2015) presents that the labour shortage of teachers is already noticeable and that it will become even worse within the next 10 years. The shortage of teachers has become evident as schools today have difficulties recruiting authorised teachers and finding substitute teachers when needed. It is further argued that this can lead to dropping knowledge results in Swedish schools in the future (the Swedish Teachers' Union, 2015).

Both the state and the heads are responsible for the competence supply of teachers in the Swedish school, however, the areas of responsibility differs (SALAR, 2018). On the national level the state is responsible for the education of teachers, the issuing of teacher certification, policy documents and labour market efforts (SALAR, 2018). The heads on the other hand, have the responsibility to develop policies that contribute to a sufficient and attractive workplace on the local level (SALAR, 2018).

As the number of pupils is expected to increase and a big group of teachers will reach the retirement age in the near future, SALAR (2018) conclude that the Swedish school is facing severe recruitment challenges. In their report, SALAR (2018) emphasise that the need for teachers has partly been affected by political reforms that they argue are not inline with the predicted demographic changes. For example, SALAR (2018) argue that the introduction of teacher authorisation and the decision to increase teacher density will be difficult to achieve when there is an already existing shortage of authorised teachers in Sweden today while, at the same time, the number of pupils is expected to increase (SALAR, 2018). How schools should handle these recruitment challenges is to a big extent dependent on the local conditions for each school, therefore according to SALAR (2018), the most suitable efforts for recruiting and retaining teachers needs to be decided on the local level, of each school. Further, SALAR (2018) argues that, in their role as employer, the heads have the mandate and can work independently to affect the supply of teacher.

If the teacher shortage persists, or worsens, there is a risk that the number of pupils in each class will increase more than desired and that a larger part of the teaching will be performed by

unauthorised teachers (the Swedish Teachers' Union, 2015). There is also a risk that the workload of authorised teachers will increase since unauthorised teachers are not allowed to set grades and the authorised teachers are responsible for planning, follow-up and assessment talks. According to the Swedish Teachers' Union (2015), this increase in workload of authorised teachers could lead to more teachers deciding to leave the profession.

Literature review

The following chapter provides a literature review of concepts and previous research within the area of the ageing workforce and an extended working life, divided into three parts. The first part covers the topic of strategic human resource management in connection to the ageing workforce, retirement and older workers. The second part presents the concept of age management, focusing on the role of managers to accomplish good practice of age management. Finally, previous research about the individual retirement decision and an extended working life is presented.

Strategic human resource management and older workers

Rau and Adams (2012) argue that retirement and the ageing workforce needs to be managed with a strategic approach that is consistent with the organisation's overall business strategy, to obtain and retain competitive advantages.

Therefore, HRM practices that support the business strategy are of importance to sustain competitive advantage since the human resources of the organisation (the employees) can be viewed as a source of sustained competitive advantage that are unique, rare and difficult to imitate (Rau & Adams, 2012). From this perspective, older workers can be viewed as renewable assets that through appropriate training, education and management can help the organisation to reach its goals (Kooij & Van de Voorde, 2015). To make use of and to improve the strategic contribution of older workers, organisations can implement HR practices that are tailored to the needs of the older workers (Kooij & Van de Voorde, 2015).

HR planning

According to Rau and Adams (2012), one important part of strategic HRM is for the organisation to understand the workforce transitions, that is; the entries into the organisation, movements within the organisation and exits from the organisation. The process of planning and forecasting the labour supply and demand of the organisation is often referred to as HR planning. The process of HR planning can be used by the organisation to predict the future, of either shortage or surplus of labour. In the case of a predicted future labour shortage, the organisation will most likely focus on retention of qualified workers, where workers approaching retirement could play an important role (Rau & Adams, 2012).

Motivation and performance of older workers

Another challenge when it comes to managing the ageing workforce is how to keep up the motivation and performance of older workers (Rau & Adams, 2012). Even if the motivation and performance do not necessarily decrease, research has shown that motivating older workers requires other methods in comparison to younger workers (Rau & Adams, 2012).

In their study Claes and Heymans (2008) explore the perception HR professionals have regarding work motivation and retention of older workers. They found that, according to the HR professionals, some of the motivators for older workers were the possibility to be in contact with managers, feelings of inclusion, more responsibility, being challenged and being a part of a mentoring program. Some HR practices of importance for retaining older workers were argued to be training, job redesign, compensation and performance appraisal (Claes & Heymans, 2008).

To develop a suitable motivation strategy it is important for organisations to understand the reason for low motivation among older workers (Rau & Adams, 2012). Even if there is limited research on the issue of motivation of older workers, Rau and Adams (2012) suggest that low motivation among older workers could be due to lower physical or mental abilities, present organisational policies and negative social signals towards older workers. Another aspect to this is if whether or not the organisation wants to encourage older workers to extended working life. If the organisation wants to encourage an extended working life it becomes important to implement HR policies and practices that are adapted to the changes in physical and cognitive abilities of older workers (Rau & Adams, 2012).

Retention of older workers

Rau and Adams (2012) argue that retention is the main HR issue for the internal workforce and competence supply of the organisation. Retention efforts targeting older workers could be about retaining employees full-time (delaying retirement) or part-time (phased retirement). When it comes to phased retirement, organisations usually do not have a formal program in place but rather tend to offer informal plans for phased retirement on an individual basis (Rau & Adams, 2012).

The decision to extend working life can be based on several factors, some of them the organisation cannot control e.g. wanting to spend more time on personal interests and with

family. However, there are work-related factors such as working conditions, benefits and pay that the organisation can use to influence older workers to extend their working lives. Workers that have a positive attitude towards their work have been found to retire later, this indicates that it is important for organisations to develop HR practices that contribute to positive attitudes and the perception of organisational support of older workers if the goal is to retain older workers (Rau & Adams, 2012).

To retain older workers, Armstrong-Stassen (2008) argues that it is important for organisations to implement HR practices that accommodate the desires and needs of older workers. Armstrong-Stassen (2008) presents 28 HR practices identified as the most important and relevant for older workers in their decision to remain in the workforce (see appendix 1). Further, these HR practices reflect seven HR strategies, where recognition and respect, compensation and flexible work options were found to be the three most important HR strategies for older workers in their decisions to continue working. In addition to this, performance evaluation, job design, manager training and mature employee training were found to be less important (Armstrong- Stassen, 2008).

In their study, Polat, Bal and Jansen (2017) found that the perceived availability of developmental HR practices was related to higher motivation for extending working life. Further, it is suggested that through these HR practices the employees perceive that the organisation provides a climate where older workers can develop themselves and that the psychological contract is therefore fulfilled (Polat et al., 2017). Similarly, Armstrong-Stassen and Ursel (2009) found that HR practices focusing on training and development were related to the perception of organisational support that was further related to wanting to continue working (Armstrong-Stassen & Ursel, 2009).

In their study of older nurses, Armstrong-Stassen and Schlosser (2010) found that to retain older workers it was important for the organisation to engage in HR practices that are tailored to the preferences and needs of the older workers. They further argue that, it is important to make older workers feel like they contribute to the organisation by giving them challenging work tasks, recognize their contributions and to enable mentorship opportunities for older workers to pass on their skills and experience.

Why organisations are not prioritising HR practices targeting older workers

Many organisations do not have strategies in place for retaining older workers and in many organisations the retention of older workers is not a priority (Armstrong-Stassen, 2008; Rau & Adams, 2012). The literature proposes several reasons for why most employers have not developed HR practices designed towards the needs of older workers.

The presence of negative stereotypes towards older workers is said to be one reason, resulting in discrimination and age bias (Armstrong-Stassen, 2008; Rau & Adams, 2012; Hedge, 2008). Typical stereotypes of older workers are that they are physically and mentally restricted, resistant to change, less flexible and less reliable (Rau & Adams, 2012; Hedge, 2008).

Managing the ageing workforce is a complex issue and there seems to be a lack of knowledge among employers when it comes to how to develop and implementing HR practices that are relevant for older workers (Armstrong-Stassen, 2008; Rau & Adams, 2012). For example, many managers have a hard time motivating older workers since their needs, values and expectations differ from younger workers (Rau & Adams, 2012). It has also been argued that employers have not yet experienced the full effects of the retirements that has been anticipated for years (Rau & Adams, 2012). Similarly, Taylor and Walker (1998) found that most organisations they studied did not work proactively with the ageing workforce, instead organisations waited until they would be forced to respond. In addition to this, the concept of strategic HR planning is a new concept for many organisations and as the role of HR is shifting towards becoming a strategic business partners it could be expected that, over time, these issues will be given more attention (Rau & Adams, 2012).

Armstrong-Stassen (2008) asked older workers and HR executives why they thought their organisation did not engage in HR practices towards older workers. The answer from older workers were that it was not a priority for the organisation, while the HR executives answered that it was because there was a lack of interest among older workers for those practices (Armstrong-Stassen, 2008).

Age management

Age management is about managing people of different ages and is defined by Ilmarinen (2005, p.120) as *“taking the employee’s age and age-related factors into account in daily work management, work planning and work organization; thus everyone—regardless of age—can*

achieve personal and organizational targets healthily and safely". Ilmarinen (2005) argues that a common perception in organisations is that ageing causes problems such as decrease in productivity, resistance towards change and increase in sickness and absences. However, there are ways to handle these problems on an organisational level, starting with recognizing the strengths and weaknesses of different age groups. When it comes to the ageing workforce it is important for organisations to work with the individual needs, flexibility and work ability of the employees (Ilmarinen, 2005).

Walker (2005) presents five dimensions of age management in organisations: 1) job recruitment and exit; 2) training, development and promotion; 3) job design and ergonomics; 4) work flexibility and 5) changing attitudes about the ageing workforce, most of them are of importance to extend working life. It is argued by Walker (2005) that good practice of age management is about overcoming age barriers, encourage age diversity and to establish an environment where people can reach their potential without being disadvantaged due to their age. To accomplish good practice of age management, HR policies and practices do not have to be addressed specifically toward older workers, it could be general HR strategies that would be beneficial for older workers (Walker, 2005). Career planning, training, flexible schedules, age awareness and promoting good health are some measures of importance for an age diverse workforce presented by Walker (2005).

Ilmarinen (2005) presents a longitudinal study, with the purpose to study the changes in health, work ability, work environment, stress and functional capacity as a result of ageing. The Work Ability Index (WAI) was introduced as a tool to measure the work ability of employees. The results of the study showed that the work ability improved for 10% of the participants, for 60% it remained good while for 30% of the participants the work ability decreased significantly. The aim of the study was to understand the reason why the work ability changed over time. It was found that work management was the most significant factor for changes in work ability. The work ability increased for the employees experiencing improvements in their manager's actions and attitudes. At the same time, for those who were given less attention and appreciation from their managers as they aged the work ability decreased (Ilmarinen, 2005).

Managers role in age management

As the study presented by Ilmarinen (2005) indicates, the attitudes and actions of managers is important for successful age management. Ilmarinen (2005) argues that knowledge about ageing is necessary for good management and that it is important that managers have basic understanding of ageing.

In their study, Armstrong-Stassen and Schlosser (2010) found that managers play a key role in the success of implementation of HR practices targeting older workers. In a similar study Armstrong-Stassen and Schlosser (2011), conclude that it is important that managers implement HR practices fairly among the workforce to retain older workers. These results indicate that it is important for organisations to educate managers in how to implement HR practices fairly and the importance of treating older workers with respect and dignity. Further, they suggest that managers should be aware of the needs and preferences of older workers (Armstrong-Stassen & Schlosser, 2011).

Furunes et al. (2011) performed a quantitative study within the public sector with a sample of managers. The purpose was to explore to what extent managers accept responsibility for, and their perception of, their decision latitude when implementing age management. Furunes et al. (2011) argue that management is one of the key factors for extending the working life of older workers. Further, the concept of “age management” could be one way to prolong working life, however, it seems to be difficult to implement. In 2001, the “Inclusive Working Life Agreement” (IWL) was introduced on the national level in Norway and 90% of organisations within the public sector signed the agreement. The agreement includes three goals, one being to retain older workers. Managers are responsible for implementing practices supporting these goals but despite this, not much improvement has been evident when it comes to the retention of older workers. Furunes et al. (2011) found that many managers are not aware of their responsibility when it comes to age management. Instead managers implied that the responsibility was shared with others in the organisation. One reason for why managers do not accept full responsibility is argued by Furunes et al. (2011) to be that it would result in more workload for managers.

Retirement

Retirement is an interdisciplinary phenomenon that has been studied within several research fields, such as organisational science, sociology and psychology (Shultz & Wang, 2011). The

majority of theories and conceptual frameworks applied in research regarding retirement comes from the field of psychology (Hewko, Reay, Estabrooks & Cummings, 2018). There is a common agreement within the retirement literature that retirement is a process, rather than a single event, that older workers go through over several years (Shultz & Wang, 2011). The retirement process is constantly evolving as the societal, organisational and social contexts changes (Shultz & Wang, 2011). Over the last few decades, there has been a cultural shift from “pro-retirement” towards “pro-work”, where older workers are encouraged through organisational and governmental policies to extend their working lives past the traditional retirement age (Shultz & Wang, 2011).

According to Wang and Shi, (2014) retirement is often conceptualized as a decision-making process where it is assumed that when employees decide to retire they choose to decrease their commitment towards their work and the organisation. In previous research, the life course perspective has been used for conceptualizing retirement as an adjustment process (Wang & Shi, 2014). The life course perspective view retirement as a transition in the course of the lifespan, arguing that the individual history and attributes influence the outcome of the transition into retirement (Wang & Shi, 2014).

The multilevel model of retirement has previously been used to understand and predict the retirement process, as it provides a systematic and structural approach for identifying antecedents influencing the retirement decision (Wang and Shi, 2014). The multilevel model of retirement view retirement as a multilevel phenomenon and to understand the individual retirement decision it is important to consider factors at the macro, meso and micro-level (Szinovacz, 2012). At the macro level, cultural values and social norms regarding retirement is argued to affect the retirement decision. At the meso level, the work context (organisation and job factors) and the non-work context (family and leisure time) influence the individual retirement decision. In the work context factors, such as, age related HR practices, job characteristics and ageism are argued to influence the retirement decision. While, in the non-work context factors such as friends, family situation and partner working situation can affect the retirement decision. Finally, at the micro level, factors influencing the retirement decision is connected to individual characteristics, such as, financial situation, health, needs and personal values. (Szinovacz, 2012)

Factors influencing the retirement decision

Various studies have adopted a quantitative approach to identify factors that could predict and influence the retirement decision. Some of the factors that have been identified are age, health, financial status, commitment to leisure activities, working status of spouse, job characteristics, attitudes towards the job, opportunities for part-time employment, human resource practices of the organisation when it comes to age and retirement, social norms when it comes to retirement and the retirement support system (Beehr et al., 2000; Adams, 1999; Feldman, 1994; Wang & Shi, 2014; Henkens & Van Solinge, 2002; Wang & Shultz, 2010; Virtanen et al., 2014).

With the aim to describe motivations for an extended working life, Hovbrandt, Håkansson, Albin, Carlsson and Nilsson (2017) conducted a study where they interviewed people 65 years or older who were still working. The result indicated that good working conditions, the possibility to influence work tasks and competence development were important considerations in the decision to extend working life. Further, it was important for older workers to be challenged at work as it contributed to self-fulfillment. Social inclusion and positive attitudes from managers and colleagues were also important in the workers choice to extend working life (Hovbrandt et al., 2019). In another study, Virtanen et al. (2014) conclude that the combination of good mental health and the opportunity to control work time are the main predictors of extended working life.

In their article, Bal and Visser (2011) examined factors influencing the motivation among teachers to continue working after retirement. Based on previous research the authors suggest that the following three work-related factors would impact teachers motivation to extend their working life; financial incentives, organisational support and the possibilities to change work roles (Bal & Visser, 2011). The results showed that financial incentives were not key drivers for teachers decision to prolong their careers. Instead, the possibility to change work role and organisational support were significantly related to continue working. Further, Bal and Visser (2011) argue that teachers are more likely to continue working if they feel that they add value to the organisation and can handle the changes in the environment.

Analytical framework

The analytical framework presented in this section will constitute the basis for the analysis of the empirical findings. In addition to the analytical framework, the empirical findings will be analysed with relevant previous research presented in the literature review. The analytical framework is divided into two sections, to understand both the present and possible HR policies and practices for an extended working life. In each section, the main concept for analysis is presented. First, Taylor and Walker's (1998) framework, regarding employers approach towards older workers, will be applied to analyse the present HR policies and practices at the studied organisations. Further, to understand the retirement decision among older teachers and possible HR policies and practices of importance to encourage an extended working life, the concept of push, pull, stay, stuck and jump factors will be applied.

Analysis of present HR policies and practices

To analyse the present HR policies and practices targeting older workers, the framework developed by Taylor and Walker (1998) will be applied. The framework is useful for analysing employers approach to older workers and has been used in previous research regarding HR policies and practices related to age (Flynn, 2010; Schröder, Muller-Camen, Flynn, 2014).

In their model, (see figure 1) Taylor and Walker (1998) distinguish between four attributes of HR policies and practices that can be used to understand the employer's orientation towards older workers. For each attribute, Taylor and Walker (1998) distinguish between two dimensions (see figure 1). Further, to classify the employer's approach towards older workers, attributes of the employer's HR policies and practices are analysed as follows:

- **Orientation.** Employers can be classified according to their overall orientation towards HR policies and practices targeting older workers. That is, whether or not there is a perceived need for policies (reactive or proactive) and if policies are based on the integration or exclusion of older workers.
- **Depth of commitment.** This attribute relates to the commitment the employer puts behind a certain policy, whether the commitment to retain older workers is strong or weak and to what degree policies are formalised.

- **Scope and coverage.** This attribute refers to the extent HR policies are intended for the entire workforce or targets older workers specifically and if policies related to age management are generalised or restricted to older workers.
- **Implementation of policies.** This attribute refers to if managers are active or passive when it comes to the implementation of HR policies targeting older workers and if the implementation of policies are partial or extensive.

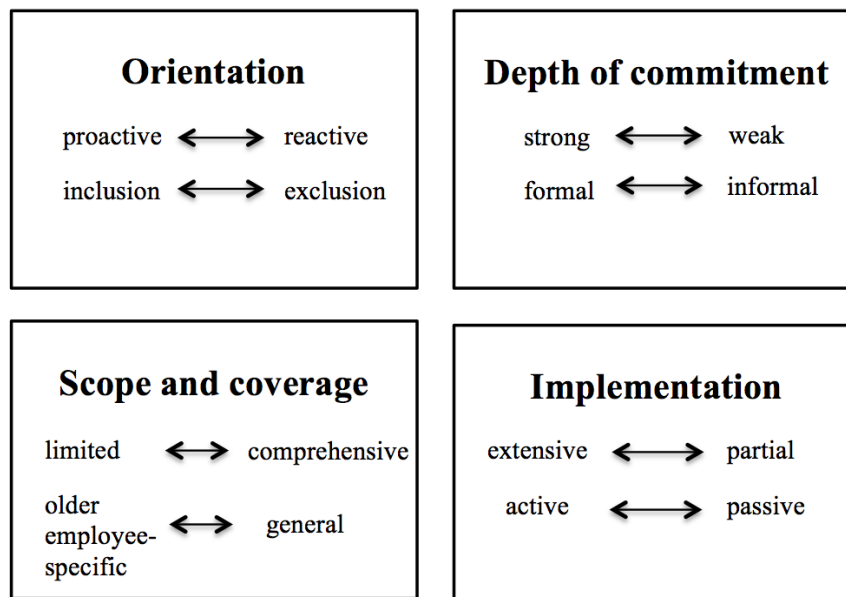


Figure 1. Figure 1. *Attributes of policies and practices.* (Taylor & Walker, 1998)

In the present study, the framework developed by Taylor and Walker (1998) will be used to analyse the organisational approach towards older teachers and how organisations work to extend the working life of teachers today.

Analysis of factors influencing the retirement decision

To understand how organisations could work to extend the working life of teachers it would be important to identify factors influencing the retirement decision of older teachers and what factors organisations have the possibility to influence. In addition to this, it would be important to understand what HR policies and practices would be necessary to implement for organisations to encouraging older teachers to extend their working life. The analysis of factors influencing the retirement decision of older teachers will be done by applying the concept of push, pull, stay, stuck and jump factors (Shultz, Morton & Weckerle, 1998; Stattin, 2009; Andersen & Sundstrup, 2019; Jensen, 2005).

The concept of push and pull factors has been used in previous research to understand the retirement decision (Shultz, et al. 1998; Beehr et al, 2000). The concept has mostly been used for understanding the decision to retire early (Shultz, et al, 1998; Feldman, 1994; Lund & Villadsen, 2005). However, the concept has also been used to understand the decision of older workers to extend working life (Virtanen et al., 2014). The pushing factors are often seen as negative considerations that force people into retirement, such as bad health or poor working conditions (Shultz et al., 1998). Pulling factors, on the other hand, are usually seen as positive considerations that pull workers into retirement, such as wanting to spend time with family, travel or early retirement incentive programs (Shultz et al., 1998).

In some previous research, the concept of push and pull factors has been developed further to include jump, stay and stuck factors to understand the retirement decision (Stattin, 2009; Andersen & Sundstrup, 2019; Jensen, 2005). Push, pull and jump factors are often related to early retirement while stay and stuck factors are explanations for remaining in the workforce (Andersen & Sundstrup, 2019).

The push explanation emphasise that retirement is involuntary and the result of exclusion from the labour market, while the pull explanation view retirement as voluntary, often through generous economic incentives for early retirement (Jensen, 2005). The jump explanation also view early retirement as a voluntary decision, but not as a result of attractive pension and economic incentives, but rather as a result of the desire to realize personal wishes and needs by devoting more time to leisure activities (Stattin, 2009).

While the push, pull and jump factors are related to labour market exit and retirement, the stay and stuck factors are related to why older workers stay in the labour market (Andersen & Sundrup, 2019). Stay explanations for remaining in the labour are considered to be positive incentives related to work that makes work more attractive (Stattin, 2009; Andersen & Sundrup, 2009). For example, it could be related to salary, having a fulfilling job, social inclusion and a positive working environment. Stuck explanations on the other hand, refer to factors forcing older workers to remain in the workforce, for example not having the economic opportunity to retire (Sattin, 2009). Stattin (2009) emphasise that these categorisations of factors are simplifications and that in practice, it can be difficult to distinguish between them since they are interacting factors, meaning that they are not mutually exclusive when it comes to understand the retirement decision (Jensen, 2005).

In the present study, the concept of push, pull, stay, stuck and jump will be used to understand the retirement decision of older teachers and to analyse how organisations can work to encourage older teachers to extend their working life.

Method

In the following section, the chosen research design and process of the study is presented. First, the motivation behind the chosen research design is presented as well as the case organisations. Further, the participant selection is presented and discussed followed by a description of the process of data collection and analysis. Finally, a reflection of the study sample and ethical considerations are included.

Rationale for the chosen research design

Based on the purpose of the study, a case study with a qualitative research design was applied, using semi-structured interviews. The qualitative research design makes it possible to get a deeper understanding of the studied phenomenon by providing descriptive data and understanding of people's perception of their situation, experiences and behaviour (Hakim, 2000). According to Yin (2013), a case study is appropriate when there is a need to understand a complex social phenomenon as it allows the researcher to focus on the specific "case". Further, the case study makes it possible to explore several perspectives in the specific context by including people with different perspectives on what is being studied (Ritchie, Lewis, Nicholls & Ormson, 2013). The case study design was appropriate for the present study, since the purpose was to understand how the Swedish primary school works and can work to encourage an extended working life for teachers. By including two organisations, from the specific case of the Swedish primary school, the study was able to provide a deeper understanding of an extended working life for teachers. In addition to this, in trying to understand the complexity of an extended working life of teachers three units of analysis were included; HR professionals, principals and older teachers.

Case organisations

The chosen case organisations were two Swedish municipalities with different organisational structures, due to their size. In the first municipality, there was one centralised HR-department supporting the whole municipality in HR-related issues. The strategic and supportivet HR-work covered all departments, where a few HR-partners supported the principals in primary schools. The second municipality, on the other hand, was a more decentralised organisation. The primary school department had "its own" HR-department, working more independently with HR-related issues in the primary school.

Participant selection

The participants were selected through purposive sampling, meaning that they were chosen based on certain criteria relevant to the purpose of the study (Bryman & Bell, 2011). To fulfil the purpose of the study older teachers were interviewed about how they perceived their situation as older teachers and their perception of an extended working life. One common definition of older workers in the literature is 55 years or older (Ilmarinen, 2006; Nilsson, 2017). Therefore, the criteria for the older teachers was that they had to be 55 years or older. This enabled the teachers to reflect about approaching the retirement age and their situation as older workers. Further, principals from primary schools were interviewed about their role as managers and their perception of an extended working life for teachers. Finally, to include the HR perspective regarding an extended working life HR professionals were interviewed as well.

In order to get in contact with relevant participants for the study, one HR professional from of the first municipality was initially contacted to see if the municipality would be interested in participate in the study. That person showed interest in the study and forwarded the information to another HR professional working with the childcare and educational department who raised the question to the operational manager for the primary school. The operational manager of the primary school expressed interest for their function to participate in the study. The operational manager acted as a gatekeeper for getting in touch with principals. In turn, the principals worked as gatekeepers for getting in contact with older teachers. To get in contact with principals from the first municipally, the operational manager contacted 30 principals via e-mail to see who would be interested in participating in the study. Two principals from two different schools showed interest in participating in the study and through these principals six older teachers were contacted about participating. Since the response from principals from the first municipality was not sufficient enough, the second municipality was later included into the study to enable a larger sample. In the second municipally, principals were contacted directly through e-mail with a request to participate in the study, two principals replied. Through one of the HR professionals in the first municipality, contact was established with another HR professional working at the primary school department in the second municipality. Through this person, a fourth HR professional was included as a participant.

In total, the sample consisted of 14 respondents; 6 older teachers, 4 principals and 4 HR professionals. The mean age of the teachers was 60, the youngest was 58 while the oldest was 64.

Data collection & analysis

The data for the study was collected through 14 semi-structured interviews. The interviews were conducted in March and April of 2019 and lasted between 30-60 minutes. In total 14 interviews were performed. All interviews, except for two, were performed face to face in Swedish at the workplace of the participants. The interviews that were not performed face to face were conducted over the phone due to practical reasons. The interviews were recorded with permission from the participants and were later transcribed. Recording the interviews made it easier to concentrate on what was being discussed during the interviews and made it possible to transcribe the interviews later on.

The semi-structured interview design was adopted since it enables the researcher to use an interview guide with questions and topics of what should be discussed during the interview (Bryman & Bell, 2011). At the same time, this type of interview makes it possible for the researcher to be flexible since it allows for adaptation and follow up questions depending on the answers provided (Bryman & Bell, 2011). Prior to the interviews, three interview guides were prepared, one for the HR professionals, one for principals and one for the older teachers (see appendix 2, 3 and 4). The interview guides included several topics that was going to be discussed during the interviews, related to the purpose of the study. The topics that were discussed with older teachers were their perception of their work, their situation as older teachers, retirement and the possibilities for an extended work of teachers. Principals were asked about their collaboration with HR, how their organisation works in regards to older workers and retirement, their own practices for managing older workers and employees retirement and the possibilities for an extended working life of teachers. Finally, HR professionals were asked about their role in the organisation, their collaboration with principals in the primary school, how their organisation work in regards to older workers and retirement and the possibilities for an extended working life of teachers. In addition to the main topics, the interview guides contained sub questions to ensure that all necessary data would be collected. During each interview, close attention was given to what the respondent was sharing so that it

was possible to pick up new topics and ask follow-up questions that was not included in the interview guide.

The analysis of the data was done using thematic analysis, which is a method to identify, analyse and report patterns or themes within data (Braun & Clarke, 2006). Braun and Clarke (2006) argued that thematic analysis is a flexible tool that can generate detailed and rich data. After transcribing the data, the first step of the analysis process was to code the entire data set. Since the data was collected from three groups (HR professionals, principals and older teachers) the data was initially coded and sorted into potential themes according to the three groups. For example, codes identified in the data collected from the older teachers were gathered into one document. These codes were later analysed and sorted into themes. Once themes had been identified and sorted in all three documents, the themes identified from the different groups were compared. In this phase, irrelevant themes, according to the purpose of the study, were cleared. The comparison was done with the aim to identify interesting similarities and differences and to eventually determine a suitable way for organising and presenting the results from the study. Some of the themes identified were: strategic competence supply, strategies for retaining older teachers, policies/routines for retirement, how the principals work, experiences of teachers extending their working lives, being an older teacher and what needs to be done to extend working lives of teachers.

Reflection of the study sample

Issues related to the study sample could have affected the results of the study. The response rate among principals to participating in the study was low. From the first organisation, only two out of 30 principals agreed to be interviewed and from the second organisation only two out of the 20 principals who were contacted agreed to be interviewed. The principals who participated were overall positive towards an extended working life for teachers, this could mean that there is a possibility that the perspective of those principals who do not advocate an extended working life is not included. The low interest among principals to participate in the study could be due to lack of time but it could also be an indicator that principals, for different reasons, do not feel comfortable talking about issues related to older teachers and an extended working life. In addition to this, principals acted as gatekeepers to establish contact with older teachers and there is a possibility that they chose those teachers they believed would be suitable to be interviewed and provide “good” answers.

Ethical considerations

Answering questions regarding older workers and an extended working life could be considered a sensitive topic for HR professionals, principals and older workers. In their report, The Swedish Research Council (2002) presents four ethical principles to take into consideration when conducting research in social science and those are; 1) information requirement, 2) the requirement of consent, 3) confidentiality obligations and 4) requirement of use. To protect the participants of this study, these four principles have been taken into account during the research process.

In accordance to the principal of *information requirement* the respondents were invited to participate through e-mail where they were informed about the purpose of the study and their role as participants. In addition to this, they were informed that it was voluntary to participate and that that they had the possible to interrupt their participation at any time. According to the *requirement of consent*, the participants had the right to decide for themselves if they want to participate or not. In the interview requests it was stated that it was voluntary to participate and it was interpreted that those who answered that they were willing to participate gave their consent. However, as a result of low response rates, a reminder was sent out once to those who had not responded to the previous request. To ensure that they did not feel pressured to participate, it was once again emphasised that it was voluntary to participate. To address the *confidentiality obligation*, the personal information about the participants has been treated with confidentiality, so that the participants' identities would not be revealed. The organisations and participants were ensured anonymity and the only personal information shared about the participants was age and work role, since it is relevant for the research. Finally, in line with the *requirement of use* the participants were informed that the data collected throughout the research process would only be used for the purpose of the present study.

Result

In the following section the findings from the study will be presented. In the first part, findings from the interviews with HR professionals and principals are presented. The aim is to describe the present HR policies and practices related to an extended working life and how the HR-department and principals work with these issues. Further, the collaboration between the HR-department and principals is presented to illustrate the prerequisites for implementing HR practices related to an extended working life. The second part presents the findings from the interviews with older teachers. In the last part, the perception of an extended working life is presented.

In order to clarify the findings from the interviews, quotations are being used throughout this section to present the results. To make it possible to distinguish between the different units of analysis, quotes from HR professionals are assigned the abbreviation “HR”, principals were assigned the abbreviation “P” while the older teachers are assigned the abbreviation “T”. In addition to this, to ensure respondents anonymity and confidentiality, the HR professionals are randomly assigned a number between 1-4, the principals are assigned a number between 1-4 and the teachers are assigned a number between 1-6.

Present HR policies and practices

At the moment, both organisations are developing strategies for competence supply, something that previously has been missing. There are no specific HR policies or practices targeting older workers in neither of the organisations to encourage an extended working life. Instead, principals have developed their own practices for how to manage older workers approaching the retirement age. However, there are policies regarding retirement in both organisations.

Retirement

One HR professional shared that their organisation has a policy in place where the managers should obtain notice well in advance before employees turn 65, if employees want to terminate their employment at 65 or if they want to remain employed. In addition to this, employees approaching retirement are allowed to work part-time or take time off before they make the decision to retire.

The mandatory retirement age in both organisations is 67, meaning that employees are allowed to work until 67 if they desire. According to HR professionals, if employees chose to stay until

they are 67 it is important that their permanent employment is terminated before they turn 67. In both organisations, employees who are approaching 67, receive information through e-mail that their permanent employment will be terminated when they turn 67. Retired employees are allowed to come back after retirement on temporary contracts in both organisations, if desired by both employee and employer.

Both HR professionals and principals believe that the mandatory retirement age is necessary and that it is a good thing that it is possible to terminate permanent employment at the age of 67. According to the principals and HR professionals, all teachers are not suitable to continue working. Therefore, it should be up to the principals to evaluate the teachers and make the decision if it is desirable for older teachers to continue working or not. One principal shared the following statement regarding a teacher that was not considered suitable to continue working:

“I had one teacher who wanted to work until 67 and so he did. Then I decided not to extend his employment because I did not think that he had performed well for several years.” - P1

Competence supply

Even if neither of the HR-departments have developed HR policies or practices targeting older workers, both organisations are currently involved in developing strategies for competence supply. When the study took place, the strategies had not yet been presented, however, one HR professional shared that competence supply had been given much attention in the organisation:

“Competence supply is a prominent part of the budget and everything, the competence supply should simply be solved. Therefore, we have a competence supply unit in place, because it is a giant mission.” - HR3

According to another HR professional, their organisation has adopted a holistic view towards competence supply. Where, in the first phase, the HR-department has produced a proposal for what approach the organisation should have when it comes to competence supply, something that will shortly be decided on by the politicians. Although an extended working life is not explicitly included in the proposal, one part of the proposal suggest that the municipally should work with lifelong learning. This includes inhabitants between the ages of 1-70, making it possible for the organisation to work with issues regarding an extended working life according to one of the HR professionals:

“We want to work with lifelong learning for our inhabitants between the ages of 1-70, that will be our focus in our competence supply strategy. That is, from

being 1 year old in preschool until hopefully wanting to hang on, if nothing less, on part-time until turning 70 years. Not within all professions, but what professions? And that is something we will need to develop further [...] the competence supply strategy should be generated in our vision [...] therefore we have synced it to our vision.” - HR2

General efforts to retain teachers

At the moment, both organisations are focusing on effort related to health to retain employees. One organisation has introduced a preventative health program, directed to all employees. According to one the HR professional, the purpose with the program is to counteract sick-leave due to work-related stress:

“We work a lot with health [...] we work proactive as well to be able to retain, so that you do not end up in sick-leave due to high workload. We have a preventative program that has been very popular [...] where you talk about stress, health, diet and exercise.“ - HR1

The HR-department in the other organisation has recently developed practices and tools for how principals should work systematically to improve the work environment, with the aim to retain teachers. One HR professional shared that the principals have reacted differently towards the new way of working, some have been positive while others believe that it takes up too much of their time from other important issues that needs to be addressed. One HR professional shared the following statement regarding the reception of the new practices and tools among principals:

“We have developed a system where (principals) are supposed to work systematically with the work environment during the whole year, with very detailed and clear guidelines [...] it takes a lot more time than what they are used to [...] some think that; great finally - since it is questions that they discuss all the time anyways, while others think that; how do you think we will have time to do this? Because we barely have time to discuss important issues during our meetings.” - H4

Principals view of managing older teachers

When it comes to managing older teachers, most principals shared that they do not have any specific ways of managing older teachers. They rather try to find individual solution when needed and in some cases the principals facilitate and adapt the older teacher’s jobs in different ways:

“I believe that it differs from individual to individual and that it is about sensitivity and the conversations, continuous conversations with those teachers who is getting older.” - P4

One principal shared that, if necessary, older teachers are allowed to step in as an extra resource in the classrooms, focusing on teaching and not have the responsibilities as homeroom teacher. Similarly, another principal offers older teachers the possibility to perform other tasks, except for teaching. For example, being a mentor for new teachers, since it can be demanding standing in front of a class at the age of 60:

“I have a complete understanding of that it can be draining standing in front of large groups of pupils at the age of 60.” - P1

Teachers approaching retirement

How and when the principals talk to their teachers about retirement differs. The principals usually do not ask their teachers directly about their thoughts about retirement, the exception was one principal who talks to teachers about their thoughts about retirement the year they turn 60. However, most principals become aware that their teachers want to retire when they ask about their wishes for the next school year in either the appraisal, wage or planning dialogue:

“Each year I hand out a wish note, asking the teachers about their wishes for the next school year. Are you going on leave, do you want to work 100%, do you want any specific assignments and through that note several teachers have come to me to discuss retirement.” - P3

Before teachers retire, the principals usually ask if they are allowed to call them once they have retired, in case they are needed. However, all teachers are not automatically asked to come back, it depends on the person. There are also times when principals try to persuade teachers to stay once they have shared that they want to retire. One principal shared that it can be difficult to get teachers to stay once they have decided to retire:

“I have tried to convince a few to stay and called them again, asking them to come back. But somehow, once they have decided to retire, they leave for good.”
- P3

Experiences of retired teachers coming back

All principals shared positive experiences of teachers that had continued working on temporary contracts after reaching the mandatory retirement age. In those cases the principals usually evaluate how things are going together with the teacher each year or semester, depending on the teacher. One principal shared one example of a 75 year old teacher that worked two days a week and was still performing well. Another principal shared a positive experience of a retired teacher had come back, however, that teacher had quit after one semester to have more time to spend on personal interests:

“I have used several retired teachers before and I have some great examples [...] I had one teacher in a pretty tough school that was pretty turbulent but the pupils loved her right away [...] she left after one and a half semester because she wanted to spend more time painting.” - P3

As long as the teachers want to come back there are usually no problems, often it has to do with that the teachers view their profession as a calling and that they do it for the pupils. However, one principal shared the following example where things had not turned out as expected:

“...I had one case where things did not turn out so well, it was a teacher that was an engineer from the beginning, who had his own ideas about how the school and pupils should work.” - P3

Collaboration between HR and principals

According to HR professionals and principals, the principals in both organisations are supported by the HR-department in HR-related issues. When working with the principals, HR is mainly supporting them in their daily work when it comes to personnel matters, such as disciplinary matters, sick leave, wage setting and issues regarding the work environment. However, the support differ depending on the principals, as noted by one HR professional:

“... we are supposed to be close in all HR-related issues, support with whatever the principals need. The problem is that the principals request different things from us. Sometimes you need to kneel in and sometimes you need to keep your distance, so we need to adapt our work. However, we try to pick up the most important issues. Salary and rehab I would say.” - HR 4

One principal usually use the HR support to make sure that personnel matters are done correctly, according to laws and regulations. In addition to this, HR provides support in extraordinary personnel matters. Similarly, another principal involves HR in personnel matters were the unions get involved and meet HR to follow-up on long-term sick leaves. It is usually the principals that contact HR if they need support in personnel matters, but there are times when HR initiate meetings with the principals. According to most principals the collaboration and support from HR is sufficient:

“It has worked fine during all the years I have worked [...] it has worked great and the have been a great support.” - P1

However, when it comes to managing older teachers, the principals do not feel like they have sufficient tools or support from the HR-department. To extend the working life of teachers, the principals express that they are in need of guidelines for how to support older teachers in the

best way possible. Further, one principal believe that it would be a good idea to formalise the way of working with older teachers. Similarly, another principal argues that HR need to develop guidelines for how principals should manage older teachers.

Being an older teacher

All teachers shared that their needs had changed when getting older, they get more tired when working and are in need of more recovery time, as two teachers noted:

“I feel that you can not cope with as much when you get older, I get more tired. Sometimes when I get home I do not want anyone speaking to me, I beome completely emty.” – T6

”... you can feel that you need more time for recreation, that you need to rest more during leisure time than you needed 20-30 years ago.” – T2

None of the older teachers perceive that it was something negative to be older. Instead, it was argued that it is usually considered as something positive that the older teachers have the experience. Much of the older teachers’ insecurities of being older has to do with their own perception of themselves, as one teacher explained:

“I have never thought about it as something negative. It is very much about your own inner feelings as well, if you feel that you are good enough and that you do a sufficient job.” - T2

In some cases older teachers had been appointed other tasks while others had not. For example, one teacher was now teaching 50% and working 50% with other tasks, such as supporting colleagues, computers and other administrative tasks. Another teacher had talked about changing tasks with the principal where the suggestion had been for the teacher to work as an extra resource, however this was never realised.

Most of the older teachers shared that they were working part-time even if there were a few who worked full-time. The decision to work part-time had been the teachers’ choice and something that had been supported by the employer. When talking about working part-time, one issue that was mentioned by several teachers was that, if you for example work 80%, it is easy to slip up to working full-time anyway. One teacher had tried to work 80% but later changed to working 90%, to match the actual working hours:

”I worked 80% for a while but then I changed it to working 90% since I had to put in the extra hours to make it work anyway.” – T4

Another teacher felt that the only way to make it work was by working 50%:

”I thought it was difficult to work 70% or 80% since it often resulted in me working full-time anyway. But now that I want to step down a bit, working 50% has been working really well.” – T3

When discussing the positive aspects of the teaching profession, most teachers shared that they were passionate about teaching and that the contact with pupils was the most positive aspect of their job. This was expressed the following way by one of the teachers:

“I really enjoy the encounters with the children, that is the satisfaction with being a teacher. It is during classes when you see them getting that “aha”-moment, wow, that is just fantastic. That is what drives me.” – T6

However, when discussing the negative aspects of being a teacher, the work environment was brought up as being stressful, mainly because the teachers have a lot of administrative tasks and big classes consisting of pupils with many different needs. In addition to this, the majority of the teachers were not pleased with their salary.

The retirement decision

When asked about when teachers wanted to retire, the answers differed between the teachers. The most common age mentioned to retire was 65, while one teacher would like to continue working as long as possible. Often teachers believed that they will gradually lower their employment rate and work part-time before they retire. One teacher shared the following thoughts regarding the retirement decision:

”I have not decided when to retire, maybe at 65 or possibly stay a couple of more years but absolutely not on full-time. I might work 50%, 2-3 days a week.” - T4

Factors influencing the decision to retire

Retirement is appealing to most teacher because it enables them to spend time on other things, except for work. For the most part, teachers view retirement as something positive and a possibility to get more leisure time, where they can spend more time with their families and on their interests or hobbies. There is however a concern among teachers regarding what their retirement will hold for them. For most teachers it is important to have things to do and a meaningful existence once retired. For example, this uncertainty became evident when one teacher elaborated on what it would be like to retire today:

“...sometimes I feel like... what if I retired tomorrow? But what would I do then? I think it would be extremely boring and I would be restless.” - T2

When asked about what will influence the teachers' decision to retire, financial circumstances are of importance when it comes to the possibility to retire. Most teachers shared that they had the economical possibility to retire but acknowledged that it is the most important aspect to take in consideration when making the decision to retire. Those with financial stability have more freedom to decide when to retire. One teacher stated that it would be necessary to continue working to receive a reasonable pension. However, the same teacher planned to work as long as possible and did not see it as an issue since that teacher enjoyed working and shared the following statement regarding retirement:

“I like working and I feel that, once I retire, what will I do? I think that work is a big part of life.” – T1

In addition to financial circumstances, the teachers shared that their health and personal life will influence their retirement decision to a big extent. Some of the teachers shared that they are planning to retire at the same time as their spouse and that their retirement decision will be influenced by when their friends retire.

Factors influencing an extended working life

When it comes to the possibility to extend working life, health is mentioned as one important factor. As long as the teachers are healthy, most of them believe that they will be able to continue working. One teacher expressed the following regarding the importance of health:

“It has a lot to do with my health, if I feel like I can not cope and are forced to work so that I get burned out again there are no possibilities for me to continuing working longer than I have to.” – T5

When asked about what the organisation could do to encourage teachers to extend their working life, one teacher thought that the organisation should make it more attractive for older teacher to stay through financial incentives. The organisation could offer older teachers to work part-time and keep most of the salary. However, the same teacher noted that money is not everything, teachers' work situation and prerequisites needs to be improved to make it possible to extend working life. In addition to this, for the teachers to extend their working life, it would be important that they they enjoy their work, that the working conditions are good and that they are able to contribute:

“It should be joyful. It should be fun to get out to meet other adults and pupils. You should also feel like you have the possibility to develop and contribute with something.” - T2

Some teachers requested flexibility and the possibility to change work tasks. One teacher would prefer if responsibilities related to being homeroom teacher were removed, while others would like to have an extra resource in the classroom that could support them. Since most teachers are passionate about teaching, it was argued by several teachers that older teachers should have the possibility to focus on teaching and have greater freedom to choose work tasks:

“I would like to get greater freedom to choose to work with those parts of the job that stimulates me, to be able to remove tiring tasks. It would be a huge privilege to be able to focus on teaching and to remove others tasks, such as meeting.” – T3

Perception of an extended working life

The majority of respondents believed that the organisation should work with efforts to make it possible and desirable for older teachers to extend their working lives. It becomes especially important to work with these issues when there is a teacher shortage but also as people are expected to work longer, as the mandatory retirement age will be raised. This was noted by one HR professional:

“As long as we have the teacher shortage we see today, we really need to work to make it possible for them to have the ability to work until they are 67.” - HR1

Extending the working life of teachers is also important because older teachers often have valuable knowledge and experience that they can share with other teachers. Losing teachers knowledge and experiences can be difficult for the schools, as noted by one principal:

“They are usually the best ever when they retire, then I just want to retrieve as much of their knowledge as possible.” - P2

Even if most principals and HR professionals think that the organisation should work to support an extended working life, some shared that it is something that will most likely not be prioritised. One HR professional argued that it is not worth to focus on efforts targeting older teachers, since it is such a small part of competence supply. Another HR professional argued that it was difficult to find time to focus on specific issues, such as retaining and encouraging older teachers to extend their working lives, because there are a lot of other issues to focus on. In addition to this, one principal acknowledged that implementing practices to encouraging older teachers to extend their working lives would not be the first thing that would be prioritised. There were however principals that believed that practices targeting older teachers had to be

prioritised, one principal stated the following regarding the possibility for principals to implement practices to encourage an extended working life for teachers:

“It is something you have to do, as well as I should interview new teachers and be a mentor for them, I need to manage and take care of older teachers.” - P2

Discussion

In this section, the results will be discussed in two parts by applying the analytical framework and previous literature. First, to understand how the organisations work to extend the working life of older teachers, the present HR policies and practices targeting older teachers are analysed according to the framework for analysing employer approach to older workers developed by Taylor and Walker (1998). Second, to understand how organisations can work to encourage an extended working life for teachers, the factors influencing the retirement decision of teachers are analysed using the concept of push, pull, stay, stuck and jump factors (Shultz, et al., 1998; Stattin, 2009; Andersen & Sundstrup, 2019; Jensen, 2005). In addition to this, factors that organisations can influence will be identified and discussed according to previous literature.

Analysis of employers' approach towards older teachers

Orientation

Perceived need for policies and action (reactive or proactive)

The present HR policies targeting older teachers in the organisations are related to retirement, while there are no specific HR policies in place for how to retain and extend the working lives of teachers. The absence of HR policies targeting older teachers suggest that the organisations have not adopted a strategic approach to the ageing workforce and that retention of older teachers is not a priority, which has also been argued by other researchers to be the case in many organisations (Rau & Adams, 2012; Armstrong-Stassen, 2008).

However, the results suggest that both principals and some HR professionals believe that there is a need for HR policies targeting older teachers. Even if there are no HR policies targeting older teachers in the organisations, all principals shared that they have developed their own practices for how they manage older teachers. Based on the results, it could be argued that the principals have a reactive approach for how they manage older teachers. For example, those principals that adjust tasks usually do so when they realise that a teacher is at a breaking point and where there is a risk of losing the teacher. In addition to this, principals usually get the information that their teachers want to retire the same year they plan to do so. Since most

principals do not work proactively to find out when and why their teachers plan to retire they do not get the chance to influence their retirement decision.

Are policies based on integration or exclusion of older workers

When it comes to the retirement policies, it could be argued they are based on the exclusion of older workers. Once teachers turn 67 their permanent contracts are terminated, in line with the Swedish legislation. Even though HR professionals and principals are positive towards the possibility for teachers to extend their working life overall, they all agree that the mandatory retirement age of 67 is necessary. It is important for the principals that they have the legal basis to terminate teachers, since it was argued by both principals and HR professionals that all teachers are not suitable to continue working. According to HR professionals and principals, it should be up to the principals to decide if it is appropriate for teachers over the age of 67 to continue working on temporary contracts. These findings point at the importance of legislative change when it comes to the possibility to extend the working life of teachers. Once the legislative retirement is shifted, the organisational policy regarding mandatory retirement age will follow.

Another retirement policy presented, was that principals should obtain information if teachers plan to retire or if they wanted to continue working once they turn 65. The normative retirement age in Sweden is 65 and asking this question before teachers turn 65 could reinforce the normative retirement age. This policy could be perceived as a way to encourage employees to retire at 65 and would therefore be based on the exclusion of older workers. Both these retirement policies indicate that organisations' retirement policies are influenced by factors at the macro level, such as legislation and social norms (Szinovacz, 2012).

Further, even if the efforts related to health and improving the work environment are directed towards the whole workforce, they could be beneficial for older workers. According to Walker (2005) good practices of age management is about overcoming age barriers and encourage age diversity, where promoting good health is argued to be one important measure. Therefore, it could be argued that these practices related to health, could be based on the integration of older teachers. However, when HR professionals spoke about these practices they did not speak about age or how older teachers would benefit from them. This suggests that the organisations have not considered the older teachers when developing these practices and that instead, the practices have just happened to be based on the inclusion of older teachers. Further, to argue that policies

are based on integration of older workers it would be preferable that older workers were taken into consideration when developing these types of practices.

Depth of commitment

Strong or weak organisational commitment

The organisational commitment to retain older teachers is weak, for the most part it is up to the principals themselves to create prerequisites to retain the older teachers that they want to keep. The level of commitment among principals to retain and encourage older teachers to extend their working lives differs. For example, some principals shared that they found it important to provide their older teachers with the possibility to change work tasks, with the aim to retain them. This indicates that some principals have a strong commitment to retain older teachers. On the other hand, one principal had talked to an older teacher about the possibility to change work tasks, but had not followed through with it, which implies weak commitment to retain older teachers.

Formal or informal organisational policies

Except for policies regarding retirement age, there are no formalised policies in the organisations for how to manage older teachers. However, some principals requested formalised guidelines and tools from the HR department for how to manage older teachers, indicating that there is a need for formalised policies and guidelines. One explanation for why there are no formal policies targeting older teachers could be because HR do not believe it is something that should be prioritised. One HR professional argued that HR should not focus on supporting managers in retaining particularly older teachers, since it is such a small part of competence supply. Instead, it was argued that HR's role was to develop HR practices to attract and retain all employees. Another HR professional argued that it was difficult to find time to discuss issues related to older teachers with the principals, since there are other issues to focus on.

In their study Furunes et al. (2011) presented the "Inclusive Working Life Agreement" that was introduced on the national level in Norway in 2001. One goal with the agreement was for organisations to work to retain older workers. As noted earlier, the present retirement policies in the studied organisations are influenced by factors at the macro level. This implies that, for the studied organisations to enforce formalised HR policies targeting older workers it might be

necessary to introduce a similar agreement on the national level in Sweden. On the other hand, in their study, Furunes et al. (2011) noted that despite the agreement, there had not been much improvement when it came to retaining older workers. Managers are responsible for implementing practices to retain older workers, however, Furunes et al. (2011) found that managers do not accept full responsibility for the implementation of practices. If the studied organisations were to introduce formal policies for encouraging an extended working life, it would be important that principals are aware of their responsibilities and that they get sufficient support from the HR-department.

Scope of coverage

Whether HR policies and practices are limited or comprehensive

HR professionals and principals spoke positive about older teachers and the possibility of an extended working life. The experiences and skills of older teachers were often viewed as valuable assets and one principal stated that the teachers are usually the best ever when they retire. There is however a common agreement among HR professionals and principals that it is not suitable for all teachers to continue working, which means that the possibility to extend working life is limited to those older workers who are considered suitable for teaching. When it comes to the retirement policies, they are comprehensive for all employees. That is, all permanent contracts are terminated once employees turn 67.

Whether HR policies and practices are older employee-specific or general

As noted earlier, both organisations have focused on general health initiatives to retain teachers, that are not older employee-specific. One organisation had introduced a general preventative health program with the aim to reduce sick-leave while the other organisation had introduced a new way of working to improve the work environment with the aim to retain teachers. According to Walker, (2005) it is possible for organisations to accomplish good practice of age management by introducing general HR policies and practices that are beneficial for older workers. Further, Walker (2005) argues that promoting good health is an important aspect of age management, something that the studied organisations are doing.

Some principals have developed older employee-specific practices, where they offer older teachers greater flexibility and job redesign. For other principals, however, these practices are not connected to age but they are rather general practices for retaining teachers.

Implementation of policies

Are managers active or passive in implementing HR policies and practices

When it comes to practices for retaining older workers the principals are active in implementing their own practices, since the organisations have not introduced any formal HR policies targeting older workers. The principals express that they do not have sufficient tools or support from the HR department for how to manage their older teachers, rather they stand by themselves in these issues. Therefore, it could be argued that the HR departments are passive when it comes to developing and implementing HR policies targeting older work. The HR professionals argue that an extended working life is such a small part of competence supply that it is not worth focusing on and that it is difficult to find time to discuss issues related to older teachers. At the same time, the principals request formalised policies from the HR department, indicating that it is something that the HR department should prioritize.

Is the implementation of policies partial or extensive

The lack of formalised policies targeting older workers in both organisations makes it difficult to analyse if the implementation of policies are partial or extensive. The only formal policies towards older people that have been identified are those regarding retirement age, that has been implemented extensively by the principals. If the organisations would introduce formalised policies towards older teachers, the principals had different perceptions of their own ability and capability to implement those policies. One principal stated that it would not be the first thing that would be prioritised while another principal argued that it would be just as important to as recruiting new teachers. These findings suggest that the implementation would be partial.

Since managers are key actors when it comes to successfully implement HR practices targeting older workers (Armstrong-Stassen & Schlosser, 2010; Ilmarinen, 2005; Furunes et al., 2011) it would be important for principals to accept the responsibility and prioritise the implementation of possible HR practices targeting older workers.

Summary of organisational approach towards older workers

The formal HR policies targeting older teachers in the studied organisations are related to retirement. The retirement policies identified are comprehensive for all teachers and are based on exclusion of older workers. There are no formalised HR policies for retaining specifically

older teachers, however, there are general HR practices in place for retaining all teachers focusing on health.

Despite the lack of formalised HR policies, principals have developed their own practices for how they manage older teachers. There is a perception among principals that there is a lack of support and tools from the HR department for how to manage their older teachers. Further, the results indicate that principals have a reactive approach to older teachers, since they adjust work tasks when teachers are at a breaking point and that principals become aware that teachers plan to retire the same year they decide to do so. Principals are willing to retain older teachers, however, providing teachers with the possibility to extend their working lives is limited to those teachers principals believe are suitable to continue teaching.

What organisations can do to encourage an extended working life for teachers

Factors influencing the retirement decision will initially be analysed using the concept of push, pull, stay, stuck and jump framework (Shultz, et al., 1998; Stattin, 2009; Andersen & Sundstrup, 2019; Jensen, 2005). Further, to analyse what organisations can do to encourage an extended working life for teachers, factors that organisations can influence will be identified and discussed according to previous literature.

Factors influencing the decision to retire

Factors that would influence the teachers' decision to retire instead of continue working were found to be financial circumstances, bad working environment, bad health, retirement decision of spouse and friends, having more leisure time, wanting to spend more time with family and on personal interests. In addition to this, the majority of the respondents shared that they would probably retire at 65, indicating that social norms regarding the normative retirement age is influencing when the teachers plan to retire. These findings are consistent with previous research where it has been argued that social norms influence the retirement decision (Beehr et al., 2000; Feldman, 1994; Wang & Shultz, 2010).

According to the concept of push, pull, stay, stuck and jump, (Shultz, et al, 1998; Stattin, 2009; Andersen & Sundstrup, 2019; Jensen, 2005) factors related to the decision to retire and withdrawal from the labour market can be categorised as either push, pull or jump factors. Bad health and stressful working environment would be considered to be push factors since they force individuals into retirement. The remaining factors would be considered to be positive

factors influencing individuals to retire. Friends and spouse retiring, wanting to spend more time with family and having the financial possibility to retire can be viewed as pull factors. While having more leisure time to spend on personal interests can be viewed as jump factor.

Factors influencing the decision to extend working life

When it comes to factors that would influence teachers' decision to extend working life, the factors mentioned by the interviewed teachers were financial circumstances, good health, financial incentives, good working conditions, flexibility, ability to contribute, enjoying work, viewing work as an important part of life and possibility to change work tasks.

According to the concept of push, pull, stay, stuck and jump, (Shultz, et al, 1998; Stattin, 2009; Andersen & Sundstrup, 2019; Jensen, 2005) factors related to continue working and extending working life are categorised as stuck or stay factors. The majority of factors that respondent shared would influence their decisions to extend their working life are stay factors, that are positive considerations influencing the teachers to stay. Financial incentives were mentioned as one factor influencing the decision to extend working life. However, in accordance to the findings of Bal and Visser, (2011) financial incentives were not key drivers for teachers to extend their working lives. Instead, good working conditions, possibility to change work tasks and flexibility were considered important for older teachers to extend their working lives.

One respondent had the intention to work as long as possible, mainly because that teacher did not have the financial opportunity to retire. Not having the financial opportunity to retire would be considered a stuck factors since it forces older workers to continue working. However, the same teacher enjoyed working and did not want to retire because it would mean sitting at home doing nothing. This means that this teacher's decision to extend working life was influenced by both stuck and stay factor, demonstrating that the retirement decision can be influenced by several factors.

What can be done on the organisational level to encourage teachers to extend their working lives

The decision to extend working life is influenced by factors at the macro, meso and micro level (Szinovacz, 2012). Organisations can not control all factors related to the retirement decision, there is however work-related factors that organisations can influence. Andersen and Sundstrup (2019) argue that push and stay factors usually can be controlled at the organisational level.

The push factors that was said to influence the decision of teachers to retire, was bad health and poor working conditions. Organisations have the possibility to control factors related to working conditions and can work to improve the work environment. In addition to this, to some extent, organisations have the possibility to influence their employees health as well. When it comes to stay factors, based on the empirical findings, the organisations could introduce financial incentives for older teachers to extend working life, provide good working conditions, job redesign and flexibility for older teachers.

As noted by Rau and Adams, (2012) workers that have positive attitudes towards their work has been found to retire later. These findings indicate that, for organisations to retain older teachers, it would be important to develop HR practices that accommodate the desires and needs of older workers. To identify what HR practices organisations could implement to encourage an extended working life for teachers, the list of HR strategies and practices developed by Armstrong-Stassen (2008) could be helpful. Based on the empirical findings, it could be argued that, job design, flexible work options and compensation are the most relevant HR strategies (Armstrong-Stassen, 2008) for organisations to focus on for retaining and extending the working life of older teachers.

Most older teachers perceived their work as stressful and expressed that their tasks would have to be changed if they would consider extending their working lives. Therefore, job design would be one important strategy to encourage an extended working life for teachers. All five HR practices presented by Armstrong-Stassen, (2008) related to job design, could be relevant for organisations to implement. Creating new roles for older teachers or redesigning jobs to be more appealing to older teachers could be the most relevant HR practice to extend the working life of teachers. The majority of older teachers shared that they are passionate about teaching and would prefer to focus more on teaching, while spending less time on other tasks such as administration, parental contact and other tasks included in being a homeroom teacher. In addition to this, since most older teachers perceived their job as stressful, it could be important to provide older teachers with less stressful tasks and to ensure that older teachers have the possibility to influence their workload. At the same time, as argued by one of the teachers, working conditions for teachers need to be improved overall since most teachers, regardless of age, perceive their work as stressful. This suggests that it could be difficult to implement older employee-specific practices for job design and that there is a risk that other teachers would

experience those practices as unfair. One principal addressed this issue, arguing that it would be necessary to make older-specific adjustments to extend the working life for older teachers and that it, at the same time, would be important to be transparent and to get other teachers to understand why adjustments for older teachers are need.

Further, flexible work options has also been identified as an important strategy for influencing teachers to extend their working lives. Retirement is appealing to most teachers and therefore, to make it more attractive to continue working rather than retire, it would be important for organisations to offer older teachers flexible work options. Providing flexible work schedules, reduced work weeks (part-time) and offering job sharing and unpaid leave could be relevant HR practices to encourage older teachers to extend their working lives. If requested by older teachers, principals usually allow them to work part-time. To make it possible for older teachers to extend their working lives it could be relevant to offer teachers approaching retirement to work part-time, so that they are able to continue working longer. However, working part-time can have negative effects on pensions and therefore it would be important to make up for negative financial consequences, to make such practice sustainable for teachers. Providing flexible work schedules for older teachers could make it more attractive for them to extend their working lives but on the other hand it would put high demands on the schools when it comes to scheduling. One principal shared that one difficulty with retaining older teachers is that it is not always possible to set the schedule according to older teachers wishes. When setting the schedule there are several parameters to take into consideration making it technically difficult to fulfill older teachers wishes. Similarly, one HR professional shared that retired teachers often place high demands on under what conditions they are willing to work. Even if it could be a challenge to fulfill the wishes of older teachers, finding solutions to these challenges might be what is required by organisations to extend the working life of teachers.

Finally, compensation has also been identified as one HR strategy that could be important for the possibility to extend the working lives of older teachers. Teachers shared that they would appreciate financial incentives to continue working after reaching the retirement age, even if it was not the most prominent factor. As one teacher mentioned, organisations could allow teachers that are approaching the retirement age to work part-time while keeping a big part of the salary, so that teachers will have the ability to work longer. In accordance to this, one HR

professional wished that the organisation could offer older teachers some type of financial benefit to make it more attractive to extend working life.

Conclusion

In this final section, the conclusion from the results will be presented by answering the researcher questions. Further, research limitations and recommendations regarding future research will be presented.

- **What approach do organisations have towards older teachers and how do they work to extend the working life of older teachers today?**

Neither of the organisations are working actively to encourage an extended working life for older teachers and there are no HR policies or practices targeting older teachers in place. However, principals have developed their own practices for how to manage and retain older teachers, indicating that there is a need for HR policies targeting older teachers. The organisations are developing strategies for competence supply, where an extended working life is given limited attention. There seems to be a discrepancy between HR and principals when it comes to the need for HR policies and practices targeting older workers, which could explain the lack of formalised HR practices targeting older teachers. On the one hand, HR argue that developing HR policies and practices to retain and extend the working life of teachers is a small part of competence supply and that there is a lack of time, making it difficult to focus on these practices. On the other hand, the majority of principals believe that there should be more support from HR and formal practices in place for retaining and managing older teachers. However, as for now principals have developed their own practices for managing older teachers.

- **How can organisations work to encourage older teachers to extend their working life?**

To encourage an extended working life, it would be necessary for organisations to make adjustments for older workers. It would be necessary to make it more appealing to continue working, rather than retire. This could be done by redesigning work tasks, offer older teachers better work conditions, flexibility and financial incentives to continue working. Most teachers enjoy the teaching profession and are passionate about teaching, which indicate that it could be possible to extended working life of teachers, if the needs and wishes of older teachers are taken into consideration. Encouraging an extending working life for teachers is challenging, mostly because retirement is appealing. However, if organisations are willing to make certain adjustments, there seems to be a possibility for an extended working life for teachers.

Research limitations and suggestions for future research

The present study has contributed to the research of an extended working life by exploring the possibility of an extended working life of teachers through the perspectives of older teachers, principals and HR-professional from two municipalities. The results showed that both organisations have similar approaches toward older teachers and an extended working life. However, since the study was limited two municipalities it is not possible to generalize the findings to other municipalities. For future research it could therefore be interesting to conduct a comparative study with multiple municipalities to see if the results would hold and be similar to the present study.

In addition to this, the results indicate that there is a discrepancy between HR and principals when it comes to the need for HR policies and practices targeting older teachers. Therefore it could be interesting for future research to examine the relationship between HR and principals. Since the principals have developed their own HR practices for managing older teachers but at the same time expressed that they were missing support from the HR-department. It would be interesting for future research to study the role of HR in schools and what support principals request from the HR-department.

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Appendix 1 – 7 HR strategies and their 28 HR practices

The seven HR strategies and their representative HR practices

1. Flexible work options

- Providing flexible work schedules (days/hours worked)
- Providing a reduced work week (part-time)
- Offering job sharing (two people sharing a full-time position)
- Offering unpaid leave (education, elder or parental care)
- Providing options to work from home

2. Job design

- Providing challenging and meaningful assignments
- Creating new roles for mature employees
- Redesigning jobs to be more appealing to mature employees
- Ensuring mature employees have input in determining their workload
- Providing opportunities to transfer to a less stressful/strenuous job

3. Mature employee training

- Targeting mature employees for training to update their job skills
- Targeting mature employees for training to acquire new skills
- Providing access to new technology that will assist mature employees in performing their job
- Providing the same opportunities as younger employees to be promoted or transferred

4. Manager training

- Providing age awareness training programs for managers (how to manage mature employees and how to avoid bias in appraising the performance of these employees)
- Educating managers about effective ways to utilize mature employees

5. Performance evaluation

- Ensuring mature employees have input in setting performance standards
- Conducting fair performance appraisal (free from age bias)
- Providing mature employees with useful feedback about their job performance
- Providing feedback to mature employees in a supportive manner

6. Compensation

- Offering incentives for continued employment
- Increase financial compensation
- Improving benefits by providing more vacation time and additional time off

7. Recognition and respect

- Recognizing the accomplishments of mature employees
- Recognizing the experiences, knowledge, skills and expertise of mature employees
- Recognizing the role that mature employees can play (e.g. serving as mentors)
- Ensuring that mature employees are treated with respect by others in the organisation
- Showing appreciation for a job well done

Appendix 2 – Interview guide, HR-professionals

Introduction

- 1) **Introduce myself and the purpose of the study**
- 2) **Provide information about the interview**
 - a) Discuss the ethical considerations
 - b) Present the themes that will be discussed during the interview
 - c) Ask for permission to record the interview

The role as HR-professional

- 3) **Can you tell me about your professional career?**
 - a) How long have you worked as HR-professional?
 - b) How long have you worked in the organisation?
- 4) **Could you describe your role as an HR-professional?**
 - a) What are your responsibilities in the HR-department?
 - b) Can you describe your collaboration with principals?

The role of the HR-department

- 5) **Could you tell me about the HR-department?**
 - a) How big is the HR-department?
 - b) How is the work divided?
- 6) **What is the role of the HR-department in the organisations?**
 - a) How are HRM strategies and HR practices decided on? (e.g. strategies for competence supply, retirement and an extended working life)
 - b) How are HRM strategies and practices implemented in the organisation?

Present HR strategies/practices

- 7) **Are there any strategies/practices/policies in place regarding competence supply today?**
 - a) If yes, can you develop?
 - b) If no, why not do you think?
- 8) **Are there any strategies/practices/policies in place regarding an extended working life today?**
 - a) If yes, can you develop?
 - b) If no, why not do you think?
- 9) **Are there any policies/strategies/practices in place aimed toward older workers?**
 - a) If yes, can you develop?
 - b) If no, why not do you think?
- 10) **Are there any formal routines for how issues related retirement should be handled?**

The possibility to retain and extend the working lives of teachers

- 11) **What are your thoughts when it comes to an extended working life of teachers?**
 - a) Is it relevant to focus on/prioritise an extended working life?
 - b) What do you think the organisation can do to encourage an extended working life for teachers?

Appendix 3 – Interview guide, principals

Introduction

- 1) **Introduce myself and the purpose of the study**
- 2) **Provide information about the interview**
 - a) Discuss the ethical considerations
 - b) Present the themes that will be discussed during the interview
 - c) Ask for permission to record the interview

The role as principal

- 3) **Can you tell me about your professional career?**
 - a) How long have you worked as a principal?
 - b) How long have you worked in the organisation?
- 4) **Could you describe your role as principal?**
 - a) What are your responsibilities?
 - b) How many teachers are you responsible for?
 - c) Can you tell me about your collaboration with HR?
 - d) Who discuss retirement with “your” teachers?

Older teachers

- 5) **Are there any formal policies/practices in the organisation for how older teachers should be managed?**
 - a) If yes, can you develop?
 - b) If no, do you wish that there were any? Who would be responsible?
- 6) **Do you manage older teacher in any specific way?**
- 7) **How do you perceive the attitudes towards older teachers in the organisation?**
- 8) **Do you perceive that there is a difference in managing older and younger teachers?**
 - a) In what way?

Retirement

- 9) **Are there any formal policies/practices in the organisation regarding retirement?**
- 10) **Do you have any routines for how you deal with teachers approaching the retirement age?**
 - a) How do you know when someone is planning on retiring?
 - b) Do you ask why they want to retire?
 - c) Do you ask if they would like to come back working after retiring?
 - d) Do you work proactive in any way?
- 11) **Do you have any experiences of teachers coming back to work after retirement?**
 - a) What are your experiences?

The possibility to retain and extend the working lives of teachers

12) What are your thoughts when it comes to an extended working life of teachers?

- a) Is it relevant to focus on/prioritise an extended working life?
- b) Should it be possible for all teachers to extend their working lives?
- c) What do you think the organisation can do to encourage an extended working life for teachers?
- d) What support would you as a manager need to encourage an extended working life for your teachers?

Appendix 4 – Interview guide, teachers

Introduction

- 1) **Introduce myself and the purpose of the study**
- 2) **Provide information about the interview**
 - a) Discuss the ethical considerations
 - b) Present the themes that will be discussed during the interview
 - c) Ask for permission to record the interview

Background

- 1) **How old are you?**
- 2) **Can you tell me about your professional career?**
 - a) How long have you worked as a teacher?
 - b) How long have you worked in the organisation?
 - c) Do you work full-time or part-time?
- 3) **Can you tell me about your work tasks?**
 - a) Have they changed in any way? If yes, how come and in what ways?

Working conditions

- 4) **How do you perceive your work as a teacher?**
 - a) Working conditions, work environment etc?
 - b) What would you say is positive with your work today?
 - c) What would you say is negative with your work today?
 - d) How do you perceive your collaboration with other teachers?
 - e) How do you perceive your collaboration with your manager?

Older teachers

- 5) **How do you perceive your situation as an older teacher?**
 - a) Have you noticed that your needs have changed with age?
 - i) If yes, has the organisation been supportive in any way?
 - ii) Have you been assigned other tasks?
- 6) **How do you perceive the attitudes towards older teachers in the organisation?**
- 7) **Do you think that the organisation should treat older teachers differently?**
 - a) If yes, in what ways?

Retirement

- 8) **What are your thoughts regarding retirement?**
 - a) Have you thought about when you are going to retire? What age?
 - i) What has/what will influence your decision to retire?
 - b) When did you start thinking about retirement?
 - i) How come?
 - c) What are you planning on spending your time doing once retired?
- 9) **Have you talked to anyone in the organisation about retirement?**
 - a) Under what circumstances and to whom?

The possibility to retain and extend the working lives of teachers

- 13) **Would you consider extending your working life?**
- 14) **Would consider coming back to work as a teacher after you retired?**
- 15) **What would be required from the organisation for you to extend your working life?**
 - a) What do you think would be required from organisations to extend the working life of teachers in general?
 - b) What do you think your organisation could do to encourage you to extend your working life as a teacher?