

# Managing older workers a report for Acas

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This paper is not intended as guidance from Acas about how to manage older workers.

## 1. Introduction

The increasing age diversity of the UK workforce presents opportunities and challenges. In particular, the requirement for age equality in employment and the ending of the Default Retirement Age (DRA) in 2011 have prompted questions about how an ageing workforce is to be managed. The abolition of the DRA was broadly welcomed, both as a solution to a forecast fiscal problem and as a socially progressive move that underscores individual rights (Beck, 2013).

However, employers' responses have tended to be reactive and piecemeal, aimed at problem solving rather than embedded into strategic goals. This report is intended as a step towards a more proactive approach. It serves as a summary of the relevant literature on the place of older employees in the workforce and the implications for the practice of managing an ageing workforce.

UK policy is consistent with the European Union's promotion of 'active ageing' (Hamblin, 2013). The EU's 2000 Lisbon Strategy aimed to tackle the 'insufficient' employment of older people and in 2001 the Stockholm European Council agreed a target of 50% employment for the 55 to 64 age group (Kasneci, 2007). In this respect the UK is in a healthier position than many EU countries: the employment rate for individuals aged 50 to 64 has increased by 14.2% to 69.6% over the last 30 years and the employment rate for the 65+ age group has doubled to 10.2% within the same timeframe (DWP, 2015).

An important factor has been the increase in women's employment, as the employment rate gap between women and men decreased from almost 30% 30 years ago to 11% in 2015. With these increases in the employment rates of older workers, the extension of working life has already become a reality and the trend towards early retirement that began in the early 2000s has been reversed.

Yet according to the ONS (2016b, 9), the biggest changes are yet to come as "the proportion of the UK population who are of traditional working age (16 to 64) has remained relatively stable over the last 40 years, but is projected to decline in future years."

With 30% of the current workforce already over the age of 50, the labour market is likely to become tighter over the medium term and employers will find it more difficult to replace lost skills (CIPD/ILC, 2015). Note: An alternative route to addressing a tight labour market is to utilise migrant labour as is exemplified by the UK health sector. This creates problems in the 'sending' countries (Lozano and others, 2015) and is insufficient to counter the overall trends of retirement amongst healthcare staff (Duffield and others, 2015). Immigration is thus a complex and important issue in considerations of the labour force as a whole but lies outside of the remit for this

report.

The Department of Work and Pensions (DWP) currently urges employers to 'retain, retrain and recruit' (Altmann, 2015). However, despite progress, these '3 Rs' are not often treated as an integrated whole; employers are more likely to take measures to retain existing workers than to retrain them. The UK is not unique: Taylor and others (2013) show that in Australia, recruitment difficulties led to a focus on engaging with – though not necessarily retraining – older workers.

The International Longevity Centre estimates that the additional benefit to the economy, were the employment rate for older workers to match that of the 30 to 40 age group, could be as much as £88.4 billion (BitC and ILC, 2015:7). The retention of older workers is an essential component of the government's response to demographic developments and this will entail adapting procedures and practices. This, in turn, requires managers to have a better understanding of what older workers can contribute and the skills to deal with a workforce with diverse strengths, weaknesses and demands.

Demographic trends are predictable and the extension of working life has been a longstanding government policy in response to increasing longevity (Macnicol, 2015). However, policy in the UK and across much of Europe has been reactive and relatively uncoordinated, as compared with, for example, the Nordic countries, (Jensen and Øverbye, 2013; Edlund and Stattin, 2013). In the UK, the financial crisis that began in 2008 prompted a higher prioritisation of the issue and subsequent media discussion has typically linked the 'problem' of an ageing workforce with the economic austerity of the past 6 years. Thus, along with longer-term planning to increase labour supply, the debate has featured a more pessimistic short-term outlook, suggesting that it is the availability of work that will be limited.

This perception is reflected in a European-wide focus on reducing early retirement and what Eurofound (2012b) called 'downshifting', a reduction of working time and introduction of gradual or phased retirement. On the other hand, a more positive perspective is possible. Employers are likely to benefit not only from an increased supply of labour, but also from the specific experience that older workers have to offer. The means by which employers recruit, retain and maximise the potential of the older age group will be referred to here as 'age management'.

'Good practice' age management has been defined as "those measures that combat age barriers and/or promote age diversity" (Naegele and Walker, 2006: 1-2). It is normally understood to include recruitment; training and development; flexible working practices; job design; and the promotion of pro-age attitudes (Walker, 2005).

In a more detailed and far-reaching definition, Ilmarinen (2012, 2) defined age management (AM) as:

"Age-related factors should be taken into consideration in daily management, including work arrangements and individual work tasks, so that everybody, regardless of age, feels empowered in reaching [their] own and corporate goals.

"The defined 8 targets of age management are:

- better awareness about ageing
- fair attitudes towards ageing
- age management as a core task and duty of managers and supervisors, AM included in HR policy
- promotion of work ability and productivity
- lifelong learning
- age friendly work arrangements
- safe and dignified transition to retirement"

When we boil this down to its basics, the aim is to ensure a good business case as well as meeting personal preferences. The question for employers is how measures designed to meet the needs of older workers can be achieved in a way that also supports organisational effectiveness and/or profitability. This report outlines current research and policy in order to set out a positive case for balancing the demands and needs of employers and older workers.

For organisations this means benefiting from the contribution that older workers can make and supporting them in the workplace, rather than aiming merely for legal compliance. Taking into account that employing older workers must be 'good business' we point to the effects that various management approaches may have on productivity. Workplace productivity in the UK is a perennial source of concern (see inter alia Abel and others, 2016), but some basic controllable elements for improvement can be identified.

A model developed by Acas lists 7 'levers of productivity' and these are used as a framework for discussions with reference to older workers, but are equally relevant for all sections of the workforce.

Acas's 7 levers are as follows:

- well designed work – jobs and work organised in ways that increase efficiency and make the most of people's skills
- skilled managers – managers with the confidence and training to manage and lead effectively
- managing conflict effectively – systems in place to reduce the likelihood of problems arising and to deal with problems at every stage
- clarity about rights and responsibilities – a working environment where everyone understands their rights and responsibilities
- fairness – employees who feel valued and treated fairly
- strong employee voice – informed employees who can contribute and are listened to
- high trust – relationships based on trust, with employers sharing information at the earliest opportunity

[\(Source: Acas's 7 levers of workplace productivity\)](#)

In the first part of this report we set out the challenge. We ask what impact the extension of working life is likely to have on UK employers and whether standard approaches to human resource management are adequate for the task. In the second part of this report we evaluate the impact of various policies and practices on older workers and consider the extent to which the issues raised by the '7 levers of productivity' address the change required by the age profile of the workforce. How is individual performance affected as we get older?

Has the abolishment of the default retirement age made a difference to older workers' motivation or behaviour at work? Is age an occupational health and safety issue? And what does 'managing older workers' entail? The report goes on to discuss how managing older workers may extend into managing the process of retirement and possibly re-employment after 'retirement'. In concluding, the report will summarise findings from the literature and draw out practical and policy-relevant recommendations.

## 2. Do older workers need to be managed differently?

Age equality does not necessarily imply identical treatment. In certain circumstances, the law requires unequal treatment, for example to make reasonable adjustments to enable older people with disabilities to continue in work. The law also allows for 'positive action' to encourage disadvantaged or underrepresented groups (EHRC, 2015a). Unlike other 'protected characteristics', differential treatment of age groups is permissible where it can be 'objectively justified' (Government Equalities Office, 2013). More generally, therefore, effective management of an age-diverse workforce requires an awareness of differences as well as similarities.

Posthuma and Campion (2009) describe a number of common age stereotypes and show how these may affect decision making in the workplace. Stereotypes may be negative (older workers underperform), or positive (they are more dependable, Taylor, 2013). In either case, the tendency to infer certain characteristics from the fact that an individual is a member of a particular age group may lead to decisions that are not only counter productive but also discriminatory.

The concept of 'generation' is often used as a synonym for 'age group' and implies that there are certain differences in the way we think and behave that can be predicted from our date of birth (Parry and Urwin, 2011; Bristow, 2015). As we will discuss below, this kind of analysis may exaggerate difference and 'talk up' the possibility of intergenerational tension in the workplace (Beck and Williams, 2014). Generational categories – for example 'Baby Boomers' or 'Generation Y' (also known as the Millennials) are often

defined rather vaguely, but they have now achieved the status of 'common sense' in relation to attitudes, loyalties and career progression (CIPD, 2008).

Some of the suggested differences between older and younger workers are unsurprising: for example, the idea that young people are more comfortable with technological change (Graen and Grace, 2015). But generational stereotypes often go further than this to predict preferences and aspirations based on date of birth alone.

'Generation Y', for example, are said to "like informality" and "embrace diversity" (Parry and Urwin, 2011: 98). Graen and Grace suggest that, since millennials are accustomed to flexibility and innovation, they experience "culture shock" when "transported to a foreign business culture" that is rule-bound and hierarchical (2015: 404). The solution, they suggest, is to re-design management practice to suit the young 'gamechangers'. The problem is that this positive portrayal of youth may be mirrored in negative attitudes to the 'baby boomers'. However, whilst the practitioner literature has made much of these differences, the evidence is thin (Constanza and Finkelstein, 2015).

The problem with generational analysis is that "the odd grain of truth is developed into an undisputed fact about essentially heterogeneous population groups, but stereotyped by their birth date. And once a generational typology takes hold.. then it is hard to dislodge" (Fineman, 2014: 1720). The importance of such generalisations is that they are likely to have an impact on management practice. If we accept them as accurate, then it would be logical to tailor management practices accordingly and treat each generation or age group of workers differently.

The attempt to categorise individuals may itself be the source of problems. Research consistently points to the fact that variation within age groups is just as important as variation between groups and that older workers are not all the same (Posthuma and Campion, 2009; Yeomans, 2011). When does a worker become 'older', for example? This may be a matter of official designation or self-identification, but either can have negative effects.

Desmette and Gaillard (2008) demonstrate that when workers think of themselves as 'older', this may be related to negative attitudes to work and therefore to early retirement decisions. Desmette and Gaillard found that, when workers believe that their employer does not differentiate by age, this is associated with a more positive approach to work. The management of older workers as discussed in this report also needs to reflect this diversity.

Note: for both the positive and the negative relationship between age and work attitudes, it is important to remember that the causal direction of the relationship is not clear. For example, it is not clear whether feeling younger results in more interest in work or whether a positive attitude towards employment would make you feel younger.

Assumptions about ageing thus have practical consequences. For example, Kooij and others (2014) distinguish between different categories of HR practice. They suggest that career development and training will tend to become less important as aspirations change with age. Instead, 'accommodative' practices become more relevant (these include workload reduction and part-time working).

Equally, employers may adopt 'maintenance' practices (job security and flexible working hours) and 'utilization' practices ('task enrichment' and participation) in order to address older workers' priorities. However, other studies question the assumption of diminishing career aspirations. Kunze and others (2013) found that older workers were more, not less, open to change at work than their younger colleagues (and so also open to developmental opportunities).

However, they note that if "often explicitly or implicitly confronted with the stereotype that they are not willing to support organisational change initiatives, [they] may sooner or later simply believe what they are told and accept this role" (2013: 754).

Van Dalen and others (2015) considered a number of age management practices, including: the adaptation of work to accommodate older workers, the provision of development opportunities, and mechanisms to promote early retirement. Their finding, perhaps unsurprisingly, is that the higher the proportion of older workers in an organisation, the more likely it is that the employer will implement age related policies.

Age management in this case involves the 'sorting' of older workers - often on the basis of performance criteria - into 2 groups: either upwards, through training and development, or outward, by 'encouraging' early exit. The overall preference in this study of employers was for the latter option. The changing age profile of the labour force means that many employers will need to reassess such preferences.

To summarise, employers need to take account of age related differences, but the temptation to pigeon-hole workers into age categories may be counterproductive. A more useful approach lies in building management competency to deal with age related issues flexibly. Managers need 'decision latitude', including the ability – and the resources - to redesign work to fit older workers (Furunes and others, 2011). This is not a controversial proposal, but research for the Joseph Rowntree Foundation (JRF, 2015) suggests that employers have been slow to change their approach and, instead of making amendments, continue to rely on recruiting young people. This is not sustainable:

"It's not so much about promoting an emphasis on older workers as introducing awareness about age-neutrality. Some sectors will be hit harder than others, but in some there won't be enough young people to fill those jobs."

Brian Beach, International Longevity Centre

### 3. Age and performance

All skills and aptitudes deteriorate at some point and so, in this general sense, performance in the workplace is age related. But this does not happen in an easily predictable way and, for most jobs, age related loss of ability is less significant than differences attributable to other factors such as education and general health (Benjamin and Wilson, 2005). Furthermore, although there are measurable differences between the abilities of age groups, these result from the declining ability of a small subset of the older group (Weyman and others, 2013). Managers who assume age-related performance problems or who target older workers for review are not only discriminating, but they are doing so based on a caricature (Simms, 2014). Although increasing age brings some deterioration of generic abilities, whether physical or mental, specific work-related abilities tend to be more resilient.

In a meta-analysis of 380 previous studies, Ng and Feldman (2008) extended the focus from 'core' competencies to look at 10 'dimensions of job performance', including 'creativity', timekeeping and attendance. They find that these factors more than compensate for physical and cognitive decline. There may be additional factors associated with older workers, such as experience, tacit knowledge or patience, which can increase performance in the specific job role (Brooke and Taylor, 2005). The range of performance between groups has been found to be less important than variation within groups (Weyman and others, 2013). A core focus of age management (Ilmarinen, 2012) is thus to treat workers as individuals, with strengths and weaknesses that may be unrelated to age.

In addition to abilities and performance, the stereotyping of the older age group has also been underpinned by the assumption that individual motivation at work is age-related (Ng and Feldman, 2012). For example, managers may underestimate employees' aspirations and their willingness to engage in training and development (Martin and others, 2014). There is a danger of this becoming a self-fulfilling prophecy, since poor uptake of training reflects the lack of appropriate provision (Beck, 2014; Felstead, 2011; Fenwick, 2008). With an increasing retirement age, the reasons for remaining in work may be more 'stick' (ie financial) than 'carrot' for many people, and this has an impact on motivation (Weyman and others, 2013).

Nevertheless, some occupational health studies urge employers to err on the side of caution. Griffiths (2000) argues that employers have an 'increased' duty of care and therefore advises that working arrangements that set older employees up to perform less well or put them under increased strain should be avoided. What is appropriate for any older employee will depend on the specifics of the sector and the workplace, but in each there will be opportunities for a range of reasonable adjustments (Yeatts and others, 1999). Generally speaking, individual 'performance' is often defined with reference to norms or targets (Beck and Williams, 2015). This should not be equated with 'productivity', which also depends on factors beyond the individual worker's control (Van Dalen, and others, 2010).

Performance management has benefits and costs, and these need to be assessed carefully. Employees may see performance measurement either as an impartial and necessary tool, or as an oppressive measure. This is often a fine dividing line, with monitoring seen as reasonable when others' work is under scrutiny, but as intrusive when oneself becomes the focus (Sewell and others, 2012). The link between specific practices and specific outcomes, for example individual performance, productivity, motivation or health and safety, is complex (see Kooij and van de Voorde, 2015) and research on the effectiveness of HRM practices on older workers is inconclusive.

Nevertheless, there is a common sense case for certain approaches and it is possible to identify certain general organisational features that are associated with efficient working. Acas (n.d.) terms these 'levers of productivity'. The following sections discuss the 7 levers in turn. Some of these levers, including the first, which focuses on the design of work and the workplace, have been previously discussed in the literature, whilst others extend the approaches that are usually applied to the management of older workers.

## **Lever 1: Well-designed work**

### **Jobs and work organised in ways that increase efficiency and make the most of people's skills**

Working hours and job design are 2 sides of the same coin. UK economic growth has been based on an increase in hours worked, rather than on labour efficiency, to the extent that "we are working slightly harder to produce the same amount of goods and services than we were in 2007" (Harari, 2016: 10). Flexibility not only boosts motivation, but it also prompts more intelligent and efficient ways of working.

The law already specifies cases where a review of job design is a right. Older employees who have a disability are entitled to a review of their working arrangements and for reasonable adjustments to be made. Since 2014, employees also have the statutory right to request flexible working (Chandler and Tetlow, 2014). This applies to all ages, providing the individual has been in their job for more than 26 weeks and is particularly relevant to older workers.

Employers are not obliged to offer a new arrangement, but rejections must be made on the basis of the reasons specified in the code of practice (Acas, 2014). But even where such rights are not already in place, there is a good case for treating job design as an integral part of performance review to enhance overall working conditions.

In practice, employers are rarely faced with requests for such a review of job design, but Barnes and others (2009) point out that this does not signify a lack of demand. Previous research has shown that older workers appear to respond differently to working arrangements compared with younger colleagues: they are more likely to be motivated by individualised work schedules (Loretto and others, 2005) and less likely to be motivated by development opportunities.

Job content is often treated as a given: individuals are then judged to be capable, or incapable, of performing as required. An influential alternative approach focuses on maximising the ability to work by matching work to the worker. Originating in Finnish research, the 'work ability' approach analyses the relationship between the capacities of the individual worker and the demands of their work (Ilmarinen, 2001). Note: the work ability approach has found considerable support, in particular from social policy commentators (Maltby, 2011) but must be treated with caution. Based on a questionnaire, the work ability index may be held by employers as part of employees' records but has also been used by the actuary profession to calculate pension needs and costs.

Whereas the concept of 'employability' focuses on developing the skills and behaviours that are valued by employers, both sides of the equation need to be considered if individuals' strengths are to be used to maximum advantage (Walker and Maltby, 2012). Appropriate management responses include job design to prevent problems and support for workers already experiencing ill health.

Poor job quality has an impact on physical and mental health and is an important factor leading to early exit (Griffiths and others, 2006). Mobility, dexterity and stamina deteriorate far sooner than mental capacity (BitC/ILC, 2015), but such deterioration can be compensated for, in most cases, by redesigning work processes.

The total cost of work-related injury and illness in the UK has been estimated at 14.3bn: most of which - 8.2bn - falls on individual employees, while employers lose around 2.8bn (HSE, 2015). The 50 to 64 age group accounts for approximately 40% of total sickness absence (DWP, 2014). Much of this can be attributed to inappropriate, or poorly thought-out work routines. So, far from being a cost, job design is one component of a high performance system that should apply to workers of all ages to prevent work-related health issues occurring.

“It’s important to start prevention very early. What you do at a younger age determines what you can do at an older age.”

Phillip Seidel, AGE Platform

A model for how employers can benefit from a focus on job design and flexibility is the mid-life career review pilot, which involved constructive conversations including all aspects of careers.

### **Box 1: The mid-life career review**

Between 2013 and 2015, BIS funded the National Institute for Adult Continuing Education (NIACE) to carry out a pilot project to assess demand for a broad-based career review among the 45 to 65 age group.

The TUC’s Unionlearn coordinated activities in 15 employers, where 770 reviews were carried out by 100 union learning representatives (ULRs), whose knowledge of the workplace and employees makes them uniquely suited to the task. As well as training and career development, reviews also covered matters outside work of relevance to career or retirement decisions (Gould and others, 2008).

Results suggest a widespread demand for advice and guidance. After review, individuals were more likely to take up training opportunities and to feel in control of their working lives.

Among the benefits reported by employers were:

“More confident employees who feel valued by the organisation”

“Reviewing and developing current working practices”

“Increased motivation and productivity” (NIACE,2015)

Unionlearn suggests that a mid-life career review should be offered to all employees when they reach the age of 50 (Unionlearn, 2014)

Source: Beck and Williams, 2014

Flexibility over working hours appears to be effective in increasing productivity and decreasing sickness absence (Bal and Dorenbosch, 2015), especially in the approach to retirement. Generally, the trend is for older workers to want to reduce their working hours and, on average, hours do tend to decrease with age, but this still leaves around a quarter of 50 to 60 year olds working 45 hours or more per week (BitC/ILC, 2015). In many cases this is involuntary. By one analysis 40% of those in the 55 to 60 group would prefer to reduce their hours and 15% would do so even if it meant reduced earnings (BitC/ILC, 2015).

However, reducing working hours is not the only factor; flexible work opportunities may be equally effective (Loretto and others, 2007; Platman, 2004; Siegenthaler and Brenner, 2000). Employers may offer flexibility of working hours, but are less likely to review job content, for example, the variety of work, task discretion and the ability to put skills to use.

Age has a demonstrable effect on ability to adapt to variable hours (Burch and others, 2009; Harrington, 2001). There are long-standing concerns about the ill health effects of prolonged shift working, since the disruption of natural circadian rhythms has physical and mental effects and, indirectly, an impact on job performance and workplace safety. However, the specific effect on older workers is disputed. One would expect adaptation to long-established work patterns, but some studies suggest that shift working in later life has a greater effect (Harrington, 2001). This leads some to urge caution: “shift working can be particularly harmful for older workers” (Barnes

and others, 2009).

More specifically, there is evidence that women cope less well with shift work and night work, report more chronic fatigue symptoms and have higher absence rates (Griffiths and others, 2006). Other research confirms the deleterious impact of shift working, but suggests a much smaller, or non-existent age effect (Burch and others, 2009). Recent research points to more nuanced effects, rather than a general decrease in tolerance to shift work: compared with their younger colleagues, older workers tend to be, for example, less able to adjust to night shifts, but more tolerant of morning shifts (Blok and de Looze, 2011).

## Summary

The available evidence suggests that designing jobs to meet the capabilities and aspirations of older workers tends to decrease turnover and sickness absence, while increasing commitment and productivity. Opportunities for flexible hours have been enhanced, in part by the ability for employees to draw down part of their pension while working, and this has benefits for employer and employee (Beck, 2013).

Flexibility applies less often to the job itself and opportunities to review career development in later working life remain limited. Without such opportunities, a 'work content plateauing' faced by older workers may have negative consequences (Armstrong-Stassen, 2008; Bown-Wilson, 2011). In situations where adjustments are undertaken but especially when opportunities for reasonable change are not available, it is usually the line manager and their ability to interact with their workforce that makes a significant difference.

## Lever 2: Skilled line managers

### Managers with the confidence and training to manage and lead effectively

Employers are now generally familiar with the requirements for equality based on sex, race or disability, but have been comparatively slow to adopt formal policies for dealing with age (Bond and Hollywood, 2009; Williams and Beck, 2015). This is particularly the case for SMEs, which are less likely to have a developed policy on managing older workers, in part because of lack of resources or specialist in-house knowledge (Fuertes and others, 2013), despite the fact that they are often more reliant on older workers' skills and experience. The absence of standard procedures and accountabilities puts extra reliance on the skill of individual managers.

Where formal procedures have been adopted, these frequently treat age-related issues as questions of performance or capability (Williams and Beck, 2015). Applied consistently, systematic performance review mechanisms appear to ensure age neutrality and have been adopted by many employers as a means of 'managing out' underperforming older workers. However, even the most seemingly objective systems rely on a degree of discretion and so are prone to the influence of age stereotypes (Taylor and Scholarios, 2014). They are therefore not a substitute for management judgement and responsibility.

Taylor and Earl (2015) contrast 2 stereotypes of older workers. On the one hand, there has been a tendency to portray older workers as victims of ageist attitudes in society (Karpinska and others, 2013a). On the other hand the economic case for extended working lives rests on the fact that older workers are capable of remaining productive and employable (Altmann, 2015). The problem is that both of these views are simplistic fictions that "may reinforce perceptions of disadvantage rather than create the conditions for mobility and transition" (Taylor and Earl, 2015: 15).

When managers recognise individual difference, they are able to work with employees' actual strengths and weaknesses. Yet stereotypes have an impact on individuals' perceptions and actions: in some circumstances there may be a tendency for younger managers to be sympathetic to employees of their own age and more likely to judge the performance of their elders harshly (Principi and others, 2015). This tendency is less marked in larger organisations where formal policy and procedures impose consistency of treatment (Posthuma and Campion, 2009) but even such procedures may not always be constructive.

"You can have all the HR practice and age management under the sun but if your managers don't know how to use them, then they're pointless."

There is a tendency for employers – particularly in smaller organisations – to opt for an informal approach (Harris and others, 2011). This informality has some advantages, as confirmed by Norwegian research (Furunes and others, 2015) showing that one of the strongest drivers to remain in work, along with job content, was the relationship with the individual manager. The problem, however, is that employers also need to deal consistently with older workers as a group. Where decisions are taken in isolation and without reference to guidance, variable and potentially discriminatory outcomes can occur.

Hiring decisions have been shown to be influenced by managers' age norms (eg the age at which they believe retirement should take place) and the way individuals' appearance and presentation reinforces such norms (Karpinska and others, 2013b). Generalisation is difficult, since the role and effectiveness of age management varies enormously. Leisink and Knies (2011), for example, find that managers support older workers' training and career development, but the authors note that this support is dependent both on managers' ability – and willingness – to act as coach and mentor. Yet continued training and development are crucial if working lives are to be extended.

Training for older workers is commonly seen as a matter of 'human capital', which tends to depreciate with age, but can be conserved and developed through learning and considered task allocation (Yeatts and others, 1999; Evers and Ester, 2013). Learning is an inherent part of working (Billett, 1999, 2002), but apart from its essential role in maintaining job-specific productivity, it also contributes to general employability (Herrbach and others, 2009) and delays the physical and mental decline associated with ageing (Phillipson, 2010).

However, the evidence suggests that employers tend to discount the value of this capital, prioritising the transfer of knowledge and expertise from older workers via mentoring, prior to retirement (Beck, 2014), rather than allowing further development. European age equality guidance actively encourages the use of mentoring, in part as a means of integrating younger people into the workforce (ter Haar and Rönmar, 2014), but mentoring can also be marginalising if it is seen simply as 'handover' prior to exit.

Training opportunities offered to older workers tend to be fewer (JRF, 2015) and of lower quality (Felstead, 2011; Billet and others, 2011; Burmeister and Deller, 2016). A key concern of employers has been the lack of time for older workers to 'repay' return on investment (Hedge, 2008; Mayhew and others, 2008). The abolishment of the state pension age has significantly undermined this argument. In addition to formal skills and qualifications, older workers may also have undertaken a significant amount of informal learning activities and with that problem-solving skills, independence, confidence and tacit knowledge (Paloniemi, 2006).

For these reasons, older workers are 'more likely than other age groups to problem solve alone and to be left to their own devices (Felstead, 2011: 203). There is a relationship between the extent to which age related issues are taken seriously and older workers' engagement with the organisation. Grima (2011) shows that older workers' responses to perceived age discrimination can range from acceptance and passivity to a more confident facing up to ageism.

This is particularly apparent when ageist stereotypes come into conflict with individual career development goals. As their formal skills and qualifications may be considered outdated, older workers can be protective of their experience, making them insecure and fearful of exposure (Mitton and Hull, 2006). This may also make older workers reluctant to discuss their training needs and shortcomings with employers, thus leading to broader issues for organisations. First, the insecurity felt by older workers is a factor leading to retirement (Herrbach and others, 2009; Vickerstaff and others, 2008). Second, especially where employment is knowledge- intensive, older workers may be reluctant to share their tacit knowledge, with a resulting impact on workforce skills (compare Tempest, 2003).

## Summary

Even when employers have formal age management policies in place, this cannot take the place of competent and mature line management. A manager is likely to be responsible both for performance management and also tasked with dealing with retirement conversations. Recent emphasis on performance management and review has assumed the age-neutrality of performance measures. This may be mistaken, both because measures themselves are biased, and because formal procedures can never be fully transparent

and still rely on management discretion. Part of the solution lies in management training, but effective management also rests on the remaining 'levers of productivity' as outlined below.

### **Lever 3: Managing conflict effectively**

#### **Systems in place to reduce the likelihood of problems arising and to deal with problems at every stage**

The CIPD (2011: 2) have described the scale of workplace conflict as "remarkable". Survey evidence shows that this increased during the recession from 2008 and it is highly unlikely that the external economic pressures on employers will ease in the near future. This puts the focus squarely on good management practice and employment relations. It is true that conflict cannot be eliminated from working life indeed, the belief that it can has been described as a "false prospectus" (Coats, 2009: 31). Nevertheless, conflict can be minimised through sound management and employment relations. Age management is a good example of this.

Conflict can emerge due to a number of issues related to age, including, for example, discrimination, or due to different expectations and needs of employers and older employees in the retirement process itself. The existence of conscious age discrimination is well established (Duncan and Loretto, 2003; Urwin, 2006; ter Haar and Rönmar, 2014). James and others (2013) US-based study also found indications of 'unintentional' discrimination based on managers' perceptions that an older worker might be less interested or unsuitable for promotion due to their age.

The demotivating effects of this discrimination and its negative impact were measurable in both younger and older workers alike. Grima (2011) found that older workers were willing to challenge discrimination but that, if their actions proved ineffective, they ultimately became demotivated. In both cases discrimination resulted from management decisions and may have been avoided had appropriate management training and guidance been in place.

The process leading up to retirement is a potential source of conflict. Since retirement no longer happens at a pre-determined time, it is effectively a decision that results from some form of 'negotiation'. In most cases it is no longer possible to require employees to retire purely because of age, unless there is an objective justification for this (TAEN, 2011b; BIS, 2011).

However, little research has been conducted on how retirement now occurs in the absence of a default retirement age and how older workers navigate this process (Vickerstaff, 2010). Employers are now less able to predict or plan for staff retirement and are equally unable to control it. Employers' main concern about the ending of the DRA was that they might be forced to retain unproductive workers (Beck, 2013), but retaining employees who may want to quit is an equally important concern. Again, the crucial requirement is a focus on individuals, not on older workers in the aggregate.

One straightforward practical example is the ability to provide adjustments in order to meet the needs of some women in experiencing the menopause. Simple changes such as being close to a window (for ventilation and light) and having access to cold water can make a significant difference. Yet a recent survey by the NUT (2014a, b) showed that only 10% of respondents had requested changes and of these only 49% were successful. In these cases, the line manager's ability to deal with the issue was often connected with their own (or partner's) experiences with the menopause. Whatever form human resource management takes, there is a need for transparency and non-discriminatory mechanisms.

Potential conflict situations highlight the crucial role to be played by line managers who need to ensure communication and compromise between both sides. The need for managers trained in age management as outlined in the previous section becomes all the more important.

The previous section noted that, in order to demonstrate age neutrality, many employers have adopted systematic performance management systems. This may be consistent with a wider tendency towards HR formalisation (Saundry and Dix, 2014). For example, Saundry and others suggest that "a general preference among managers for pragmatic approaches to conflict resolution has increasingly been replaced with a rigid adherence to process and procedure" (2014: 5). In the case of older workers, the question is not only whether performance measures are reliable, but also whether adequate mechanisms exist for review and for dispute

resolution.

In some cases the mechanism for review is based explicitly on a 'forced distribution', such that the proportion of staff in each performance band is pre-set. The crucial question here is the way in which appraisal ranking links with retirement discussions; Taylor and Scholarios (2014) point out that, quite apart from the effect on morale and teamwork, the legality of these schemes has yet to be tested. An inflexible and punitive approach to performance is likely to have a disproportionate impact on older workers, not only because performance criteria may not be age neutral, but also because management decisions may be influenced by age related stereotypes.

More generally, all performance rating schemes are implicitly 'norm-referenced'. For example, when an older worker is judged to be performing or under-performing, this only makes sense in comparison with the rest of the workforce. Performance measurement, unless guided by sound management, may generate a counter-productive sense of competition and injustice (Williams and Beck, 2015).

Just as important as the effect on productivity, an over-reliance on formal mechanisms may allow discriminatory practice to go undetected. Even where unions are recognised, employers have typically been reluctant to consult before implementation and unions have instead focussed on policing the application of particular schemes (Williams and Beck, 2015). Although it is too early to assess the impact on Employment Tribunal claims, it is worth noting that the average award in cases of age discrimination increased more than awards for any other category of claim between 2012 and 2014 (Ministry of Justice, 2014).

## Summary

Conflict, in some form, is a normal part of working life, and cannot be excluded entirely from the employee-employer relationship and conflict management remains a central function of HR practitioners (Saundry, 2016). However, the reliance on mechanistic approaches to performance and capability issues creates additional risks for which there is no technical 'fix'. A feature of the default retirement age was to make dispute irrelevant. Since retirement decisions are now unavoidable for employee and employer, conflict is a possibility. To date, trade union demands have largely centred on protecting pensions, but a more mechanistic approach to performance management may have consequences for workplace employment relations.

## Lever 4: Clarity about rights and responsibilities

### A working environment where everyone understands their rights and responsibilities

The law regarding the employment of older workers is clear, but legal guidance for workers themselves is, as yet, less extensive than for other comparable groups. The requirement for age equality was introduced in 2006 and age is now one of 9 'protected characteristics' defined in the Equalities Act 2010. This makes it unlawful to directly discriminate on the basis of age, or to apply criteria that may have an adverse impact upon a particular age group. Harassment that may be related to age and victimisation of workers who have already complained of discrimination are also made unlawful (for further guidance, see Acas, 2014, Age and the Workplace).

What is less clear is how 'intersectionality' is dealt with, when, for example, multiple characteristics are present to which the law applies (Rodriguez and others, 2016). This may be the case when an older worker is disabled, female and from an ethnic minority background.

Regarding age, the law deliberately avoids restrictive definitions of age groups. For example, 'older' workers may refer to a narrow age range, it may refer to workers over a certain age, or it may be relative, referring to workers who are older than a given comparator. An age group can also be defined according to subjective perceptions, for example when an employer makes assumptions about "the grey workforce" (EHRC, 2015b).

Older and young workers work alongside one another and there is therefore a risk that policies that are targeted at one group may be to the detriment of the other. For example, if the aim is to retain older workers, then it may be considered proportionate to tailor working arrangements to meet the needs of this age group.

As well as meeting the needs of business, this approach can also be seen as an example of fairness over the course of working life (White, 2012; Beck and Williams 2014). There is little evidence to date of employers taking such initiatives; on the contrary, the tendency appears to be away from age-specific initiatives. Whereas older workers might previously have been allowed to 'wind down' before retirement, employers are increasingly reluctant to sanction this, believing it to be potentially unlawful (Williams and Beck, 2015).

Managers' insecurity and lack of confidence with regards to older workers may be due to fear of difficult conversations and what is perceived as a legal minefield (Saundry and others, 2014; Wakeling, 2014; McNair and others, 2007). Supporting such managers in developing positive age management could make a significant contribution to overall employment relations.

In fact, this risk aversion may be unwarranted. The law allows for different treatment of older and younger workers, providing that this can be objectively justified as a proportionate means to a legitimate aim. The European Court of Justice has to date determined that a number of broader priorities can be deemed 'legitimate aims', for example the aim of promoting inter-generational fairness, or the aim of avoiding "humiliating forms of termination of employment" (ter Haar and Rönmar, 2015: 26). These aims have been the basis of a UK employment tribunal case (Seldon v Clarkson Wright and Jakes [2008]), where one of the justifications for setting a company retirement age was to limit the use of performance measures in order to protect employees' dignity at the end of their working lives (Vickers and Manfredi, 2013).

The implication is that there is a considerable degree of confusion or at least insecurity about what is or is not possible within the rights and responsibilities that apply to managing older workers. Employers and managers action or inaction is likely to have direct implications for the workforce. Armstrong-Stassen and Schlosser (2011, 323) link an individual's perception of whether they are valued in an organisation to their experience of rights and responsibilities associated with their membership of the organisation:

"Perceived organizational membership reflects only the rights conferred upon the employees by the organization. The resulting obligations of employees that reflect the return on the organization's investment are equally important to the social exchange cycle. As a member of an organization, there is a responsibility to be actively present. Hence, the intention to remain working with an organization is clearly an outcome of organizational membership."

Older workers' mixed experience with regards to feeling valued and fairly treated (to be discussed in the next section) may thus be a factor contributing to working environments where rights and responsibilities are not clearly defined.

## Summary

The evidence suggests that employers tend to act in a risk adverse manner and, in the process, may be further muddying the waters for employment relations involving older workers. There is established case law precedence at UK and European level as to when different treatment of variously aged workers is permissible. In fact, such a tailored approach may be key to employees' feeling part of the organisation, valued and fairly treated. Notwithstanding uncertainty regarding the future status of EU law in the UK, the legal position is clear. However, it is likely that the training and guidance available to managers has often tended to focus on the risks, while understating the scope for tailored good practice (Weyman and others, 2013).

## Lever 5: Fairness

### Employees who feel valued and treated fairly

The combination of an ageing workforce and austerity economics has prompted a sustained focus on fairness – or lack of it – between age groups (Willettts, 2010; Bristow, 2015). The dominant argument has been that today's young people inherit a harsher and

impoverished society. Applied specifically to the workplace, developments such as increases in employment insecurity, the growth of unpaid internships and the winding up of defined benefit pension schemes clearly create new challenges for those entering the labour market.

For those at both ends of the age spectrum, and despite legislation to counter it, age discrimination continues to exist (Beck, 2014; Parry and Tyson, 2009, 2011; Urwin, 2006). Porcellato and others (2010) found, for example, that employers tend not to value the human and intellectual capital that older workers contribute to the workplace. Ageism is resilient (Taylor and McLoughlin, 2013) in part because it is often unacknowledged and because it can affect workers of different ages (Taylor, 2013).

A clear distinction needs to be made here between the retention of existing employees, who account for most of the increase in older workers, and the recruitment of older workers, which is less common. Unemployed older workers still struggle to re-enter work following a spell of unemployment (Casey and Laczko, 1989; Reynolds and Wenger, 2010). This is particularly true for low-pay workers with fewest resources to deal with their situation (TAEN, 2011a; Beck, 2013).

There is a strong, though complex, link between fairness, 'wellbeing' and performance (Bryson and others, 2014). Individual deals are often seen as a recipe for discontent, but Bal and Dorenbosch (2015) make the case that fairness is best achieved by individualising work design and working hours, making individualised work arrangements available to all employees. This, of course, begs the question of how an employee (or a tribunal) is to judge the fairness of such a fragmented approach.

There are particular concerns surrounding the notion of fairness regarding older workers, as opposed to the more widely used concept of equality. In the past, an implicit idea of fairness over the course of a working life (Roberts, 2006; White, 2012) may have involved managers easing the pressure on older workers to compensate for long and loyal service. Beck and Williams contrast this form of fairness with 'synchronous' equality between employees at any one time (2015). Clearly both equality and fairness are reasonable expectations (Pitt-Catsoupes and others, 2013), but Beck and William suggest that, following the 2010 Equality Act, many employers have prioritised the former at the expense of the latter. The danger is that employees are judged on their present weaknesses, rather than their longer-term contribution.

This trend is in accordance with DWP guidance (2011), which advocates systematic performance management as a means of 'discrimination proofing' decisions that might ultimately result in dismissal or retirement. The DWP (2011) has recommended the latter as a way to deal with employees who are not delivering and suggests that the conversations should include employees' 'options'. This presents challenges.

First, there needs to be a clear distinction between an informal discussion about retirement plans and a formal one about performance or capability. Second, in setting performance expectations, managers need to consider the age dimension: setting the same target for young and old does not necessarily avoid indirect discrimination.

The process leading up to retirement may be particularly problematic if older workers have not been supported and have not received consistent appraisal. Far more (44%) over-65 year olds reported not having had an appraisal over the last 2 years than did employees overall (27%). The CIPD see this 'neglect' as the result of 'lazy management' (CIPD, 2011). This needs to be seen alongside the changing nature of appraisal. In a study of public library staff, Williams and Beck (2015) found a shift of emphasis toward performance metrics and the attempt to align appraisal with organisational goals. Almost two thirds of employers had plans to change the form of assessment. Library managers and trade union representatives saw this as being at the expense of the developmental element of appraisal.

## Summary

Fairness is a complex concept, in particular in relation to older workers. A distinction can be made between formal equality and fairness over the course of a working life; both are necessary if older workers are to be valued and productive. Central to this is the appropriate use of performance and development review. In particular, the developmental element is as relevant to older workers as to their younger colleagues.

## Lever 6: Strong employee voice

### Informed employees who can contribute and are listened to

'Voice' refers to workers' ability to communicate their views to their employer and to be heard. In cases where there is no formal channel of communication, this voice may be an individual one, comprising suggestions or grievances. Alternatively, 'voice' may be coordinated via trade union representation.

A general definition of voice is:

"[The ability] of employees to have a say over work activities and decisions within the organizations in which they work, regardless of the institutional channel through which it operates." (Wilkinson and others, 2014: 6)

As well as a moral case for promoting employee voice, there is a business case. When employees have a voice, problems tend to be addressed earlier, more informally and at lower cost. More broadly, where this voice is collective, via a trade union, employers are more likely to implement pro-age policies (Barnes and others, 2009).

The example, mentioned above, of reasonable adjustments for workers experiencing the menopause, demonstrates why voice is important to older workers. In this case change relied on disclosure of their situation: a route for which only 20% of respondents opted in that study (NUT, 2014a, b).

The ability to have a voice has benefits whatever the outcome. Using the example of self-assessment as a form of voice, Geddes and others show that voice promotes confidence in procedural fairness "even when one's communication does not directly influence an eventual decision" (2003: 24). Taken together, direct and indirect 'voice' mechanisms may have a positive influence on both organisational commitment and on employee retention (Bryson and others, 2013).

Inclusive working practices, which allow the employees' voice to be heard and taken into account, are more likely to promote organisational efficiency (Johnstone and Ackers, 2015), partly because they allow workers to use 'tacit' knowledge to best effect (Eurofound, 2015) but also because of its effect on motivation (Grima and others, 2015). The 2011 UK Workplace Employment Relations Study found that 85% of employees who were "satisfied with their involvement in decision-making felt proud to work for their organisation". This compared with just 35% of those who were dissatisfied (van Wanrooy and others, 2013: 19).

Retirement decisions are now 'negotiated' ones, in the sense that they reflect the priorities of both individual and their employer (Williams and Beck, 2015). Discussion and, where available, representation are now crucial in the period leading up to retirement if this period is to be managed constructively, but larger, non-unionised organisations may be least well placed to do this. Working relationships in SMEs often means that difficult decisions can be handled informally, rather than through procedure; although Saridakis and others (2008) point out that disputes arising from such informal arrangements may be more vulnerable to challenge at tribunal.

Despite this evidence, 'voice', in itself is not a panacea:

"Ultimately, whether older workers have a say in their working lives is less about having a 'voice' than about whether someone is listening."

Brian Beach, International Longevity Centre

This question – whether 'someone is listening' depends in large part on the form that employee voice takes. Workplace union representation is associated with more efficient communication and grievance handling, lower quit rates and, indirectly, more efficient management (Bryson and Forth, 2010). However, trade union membership in the UK has fallen from 32% in 1995 to 25% in 2014 (BIS, 2015). This decline is moderate compared to some other European countries (Waddington, 2015), but it has resulted in a highly uneven distribution: 54% of the public sector workforce are unionised, compared with just 14% of the private sector. Just as importantly, 70% of union members are now to be found in workplaces with more than 50 employees (BIS, 2015; Williams and Quinn, forthcoming).

The evidence suggests that the absence of unions from many workplaces has not been matched by a growth of other representative or dispute resolution mechanisms. The result is often an increased reliance on formal procedures that may minimise the role of either employee voice or management discretion (Jones and Saundry, 2012). These unintended consequences result from the fact that employee voice and employee engagement are often 'challenging' for managers to deal with (Purcell, 2014), particularly when employment relations are individualised in a non-union environment. These changes have consequences for the management of older workers. Management practices are more likely to be "pro-age" in unionised workplaces (Barnes and others, 2009), though unions themselves have been relatively slow to respond to the age equality agenda (Duncan and others, 2000).

The membership of UK trade unions is ageing, with 38% now over the age of 50 (BIS, 2015). This changing demographic has created some tensions in union priorities: between, on the one hand, attempting to protect pensions and early retirement options and, on the other, enabling members to continue in employment for longer (Flynn and others, 2012). Unlike in Germany, for example, where unions continue to have a voice in national policy making, UK unions act primarily at the local level and their role has been a defensive one (Flynn and others, 2012).

## Summary

Employees' ability to have a voice – and more importantly, to have that voice taken seriously – has general benefits for employment relations and for productivity. As part of age-management, the ability to discuss retirement is essential for planned and fair outcomes. Informal, direct voice may be more easily achieved in smaller organisations, although there are also potential problems. Workplace trade union representation is associated with 'pro-age' practices and with a lower tendency for employees to quit. This may be explained by the greater efficiency of collective voice and by the constructive challenge to management thinking that unions have the potential to offer.

## Lever 7: High trust

### Relationships based on trust, with employers sharing information at the earliest opportunity

Trust is an abstract concept, but when it disappears, we notice. The trust involved in the employment relationship is based on individual relationships: between the individual employee and his or her manager, colleagues, and the organisation as a whole. These trust-based relationships are the foundation for information sharing, innovation and problem solving (Shazi and others, 2015). Brown and colleagues, using data from the GB Workplace Employment Relations Study, demonstrate a relationship between levels of trust and workplace performance (van Wanrooy and others, 2013; Brown and others, 2015).

Trust is developed over time and so we might expect to see a contrast between older and younger workers (Bal and others, 2011). But trust also has to be earned.

"If an employee trusts their employer, which they might, it's because they know him for a long time, they know very well how the organisation functions and because they have been relatively well treated in the past. It's not a policy but a personal issue."

Phillip Seidel, Age Platform

As well as the terms set out in the contract of employment, individuals also have a number of explicit expectations, both about the work process itself and about the nature of their relationship with their employer. These expectations are referred to as the 'psychological contract'. Rousseau and Tijoriwala (1998: 679) define the psychological contract as "an individual's belief in mutual obligations between that person and another party such as an employer".

These expectations are implicit, but breaches of the contract may have damaging consequences for trust and therefore for commitment. The psychological contract may be a 'transactional' one, based on immediate, tangible rewards for improved performance, or it may be 'relational', based on job security and career development for commitment and loyalty. Using the example of the shift from defined contribution to defined benefit (DB) pension schemes, which Gough and Arkani (2011) argue that there has been

a shift from the latter to the former. DC schemes, they say, reward long service and constitute a long term 'promise' on behalf of the employer. They suggest that this breach of the psychological contract may have consequences for performance and for employers' ability to manage retirement.

In workplaces where organisational support is coupled with a high level of task discretion and involvement, these practices are associated with higher levels of commitment. On the other hand, surveillance and tight control of work have a negative impact on the psychological contract (Gallie and others, 2001). This matters because employee attitudes are related to individual performance and decisions to stay or quit (Harrison and others, 2006).

In the case of older workers, attitudes are moulded by change in these factors over the working life. Smeaton and White (2015) argue that a combination of increasingly 'precarious' jobs, intensified work and reduced autonomy already mean that older workers have "experienced a less satisfactory work situation than they would have been led to expect from conditions in their earlier careers". Based on analysis of the Skills and Employment Survey, they show a detrimental impact on attitudes over this period.

As Battaglio and Condrey (2009) point out, long tenure involves greater investment and commitment in an organisation, which is conducive to trust, but may also mean that employees accumulate experience of poor, or inconsistent management, which has the opposite effect. The ingredients for a high-trust workplace are often stated, but not so often put together: effective communication, employee participation, fair treatment and competent line managers (Acas, 2015).

As Henkens's (2005) large scale Dutch research suggests, trust may be put at risk by poor communication and the temptation to think 'on behalf of' rather than 'with' older workers. Simple steps such as 'walking the floor' and regular, informal meetings can help ensure that (older) workers' views are heard (Acas, 2015). Henkens also highlights that lack of communication can result in a self-fulfilling prophecy that creates stereotypes of older workers. The danger applies to both managers and colleagues who may be basing their opinions on rhetoric from beyond the organisation (Van Dalen and Henkens, 2005).

Both trust and communication are 2-way processes and it is not only older workers who may trust or mistrust their managers or organisations as a whole. Leisink and Knies (2011) find that line managers' effectiveness in supporting older workers is dependent not only on their ability, but also on their willingness to engage with individual workers and the amount of professional discretion the employer allows them. Trust presupposes that line managers have authorisation to act on decisions.

In turn, this means that organisations need the confidence to allow managers the discretion to do their job (Acas, 2015). Whilst consistency is important, the formalisation of HR procedures in this area can be counterproductive. Antcliff and Saundry (2009) note that, far from solving problems at the appropriate level, formal disciplinary or capability procedures tend to be overly rigid, effectively a conveyor belt toward formal sanctions.

"Employers who may prefer to give an employee a 'good talking to' may be compelled to issue a formal warning in order to comply with a disciplinary procedure and ensure legal compliance." (Antcliff and Saundry, 2009: 112)

The effect of trust may be counter-intuitive. Trust might be expected to moderate the effect of negative outcomes, but Bal and others (2011) found that individuals with high trust in their organisation are affected more by perceived injustice at work. Employees who experience such a loss of trust may feel betrayed by the organisation or threatened in their sense of worth, and therefore more likely to quit.

The 2008 recession was different to previous economic downturns in that fewer workers were made redundant, but in organisations where older workers were made redundant, the effect on 'survivors' was often to undermine trust (Beck, 2013; Eurofound, 2012a). Thus, trust may look and feel very different depending on who you are and what your position is within the organisation (Acas, 2015).

## Summary

Trust is not only an abstract concept; it is also the 'glue' that holds many of the already discussed 'levers' of productivity together, it is an essential aspect of managing older workers. Continued trust depends on the combined effects of the previously discussed levers of productivity, in particular on good communication and age aware (line) management. The way in which work is organised and

managed has an impact on trust, since older workers bring a long view to bear on current initiatives.

## 4. Managing 'retirement' and after

Whilst, for many employees, retirement will continue to be something to be welcomed, and will represent a clear end of working life, for many others this is no longer an either/or choice. With greater opportunities for individually tailored working arrangements, as well as the option of drawing a pension whilst continuing work, employers now need to consider how to deal with a crucial section of the workforce that is effectively 'semi-retired'. This makes a focus on the 7 levers of productivity even more essential.

As Chandler and Tetlow (2014) point out, the right to work while drawing a pension was introduced in October 2006 and may have increased employment amongst older workers who had occupational pension rights. Morrel and Tennant's (2010: 7-8) show that:

"Where retirement was not explicitly addressed or discussed between employer and employee there was evidence that this kind of 'non-approach' was not universally well received: participants suggested that they would have appreciated a more formal approach and felt that they might have missed out on something as a consequence, for example the option to continue working or continue working with a different working pattern."

The route into retirement can be a prolonged and messy process, which has been driven by the needs of various groups. Employers aim to retain skills and knowledge for as long as it is required; older workers may need to continue earning, but can also utilise transition work to adjust to retirement; and governments are keen to increase tax revenues and reduce social security expenditure (Taylor, 2013).

In the case of Japan, for example, which began extending working life almost 50 years ago, the need to continue in work has been increased by setting the mandatory retirement age lower than the age of entitlement for the state pension (Rix, 2013). Most post-retirement employment is low wage and non-regulated, leading Oka (2013: 64) to characterise the Japanese approach as a "publicly subsidized cheap labour system". Other countries, such as the US, do not set employment and retirement age targets at all, preferring to trust the market (Rix, 2013). Only a very small number of countries retain early retirement schemes: for example Norwegian workers can take early retirement at age 62 (Furunes and others, 2015).

Many workers no longer face a clear demarcation between working life and retirement. Alcover and others (2014) distinguish between 'cliff edge' and 'phased' retirement. Cliff edge retirement is the traditional arrangement: from full workload one day to no work the next (Vickerstaff, 2006). This sort of rapid exit is often unhealthy for the individual employee (Loretto and White, 2006), but it also creates problems for employers, in particular in relation to the loss of experience and skills. 'Phased' retirement might involve part-time work for the same employer, or 'bridge' employment with another (or via self-employment). 'Partial retirement' is "ending a 'career' and beginning a new job, possibly on reduced hours" (Alcover and others, 2014).

Retirement is not necessarily a one-way street. 'Re-entry' into the labour market, or 'unretirement' (Post and others, 2013; Schlosser and others, 2012; Maestas, 2010) will be increasingly common. Although we still use the word 'retirement', this will now be a much more flexible and episodic process, rather than a permanent state. According to Chandler and Tetlow (2014), 4.3% of 50 to 69-year olds who are inactive return to work over a 2-year period, though this percentage reduces with age and increases if a partner is in continuous employment. The proportion is further influenced by caring responsibilities and health status.

With most of these transitions into retirement, the discussion and arrangements between employer and employee will need to consider the kinds of issues discussed under the 7 levers of productivity. This is especially important if we consider that part-time or bridge employment for older workers has been compared to un- or under-employment due to the limited agency held by this workforce (Taylor, 2013).

## 5. Concluding discussion

The ageing of the UK workforce is now a fact of life. The impact of this change on employers and employees will depend, to a large extent, on the quality of management and the ability of organisations to deliver both equality and fairness. This report goes some way to suggest a more proactive and innovative approach to the management of the older workforce than is currently in place. This approach reflects the UK's policy approach, which the DWP Fuller Working Lives Team summarises as follows:

### **A view from DWP - Fuller working lives and managing older workers**

In spring 2016 the government intends to publish a new, employer-led national strategy for older workers which will also incorporate and drive forward the recommendations from the report 'A New vision for older workers Retain, Retrain Recruit'. The employer-led Business Strategy Group is looking at a variety of issues that affect older workers which will feed into the national strategy. This will set out the future direction of the Fuller Working Lives agenda. Two of the several areas of focus are skills and managing an ageing workforce.

Overall, the majority of the discussions in the literature summarised here is consistent with the fundamental values of age management in its broader and more comprehensive definition by Ilmarinen (2012). This sees age management as part and parcel of daily management and, moreover, essential to reaching individual and corporate goals. Following this definition, we can summarise the main themes arising from this literature by drawing on the 8 targets of age management (Ilmarinen, 2012, 2):

First, there needs to be better awareness about ageing. This applies to the full range of HR considerations: from the legal guidelines of what is and is not legally possible to understanding group based and individual differences. As highlighted throughout the report, within age group differences are often more important than between group variation.

Second, fair attitudes towards ageing are a necessity (see especially the discussion around Lever 5). Employees who feel valued and fairly treated, as opposed to being treated equally, are more likely to be motivated.

Third, the concept of 'age management' may be a new term, but it is not complicated. It comprises core, everyday management practices: good communication, clarity about responsibilities and well-trained managers with the confidence to respond to individual circumstances. The research summarised in this report makes it clear that these things make significant differences to the perceptions of all workers, not just those who may be labelled 'older'. In many ways, good practice in managing older workers is merely 'good management'.

Fourth, age management should be an integral part of HR policy. Trusting relationships at work (Lever 7) depend on clear procedures, applied consistently. In particular, the employee's expectations about retirement form part of a 'psychological contract'. Breach of this contract has consequences for individual and workplace.

Fifth, jobs are designed – and they can be redesigned. Exploring the potential for matching work to individuals' abilities, rather than expecting individuals to fit in with the requirements of the job, can help build age friendly working, avoid age related occupational health risks and boost organisational commitment. Promoting the individual's ability to work, whether this is via well designed physical environment, job content, and level of autonomy (Lever 1), or in terms of access to training and development of all staff (Lever 2), pays dividends in productivity.

Sixth, such training and development requires lifelong learning (Levers 1 and 2). The motivation to continue learning may depend not only on the quantity and quality of opportunities available but also on how relevant and applicable the skills are to the workplace and how appropriate the style of delivery of the training is for individual preferences.

Seventh, age friendly work arrangements are perfectly consistent with the aim of equal treatment. Equal does not necessarily mean the same. Age management needs to recognise individual strengths, and work with them.

Eighth, the traditionally male, 'cliff edge' form of retirement (Vickerstaff, 2006) is increasingly rare and good age management now includes ensuring that there is a safe and dignified transition to retirement. In many cases, this will include changes to the types of

work or employment individuals undertake, whilst also enabling employers to transfer vital skills and knowledge.

## 6. Recommendations

Age management is about more than just avoiding discrimination. It means applying age awareness to all areas of HR management including recruitment and retention, training and development, job design and work routines, performance management, and the management of organisational 'culture'.

'Textbook' answers are not a substitute for sound management, but some general recommendations are possible. These apply primarily to employers, although there are also implications for trade unions and for government.

The following are based on the recommendations for employers set out in Altmann's Review (2015):

### Retain

Implement age/skills audits to monitor age diversity and potential skill shortages. Remember, though, that there are dangers in using age as a category in HR strategies and decisions (Hertel and others, 2013; Posthuma and Campion, 2009).

Line manager training. Specifically, line managers need to be age aware; more generally, they need the skills and confidence to handle informal and sometimes unpredictable discussions.

Flexible working. Promote a better and more flexible employment environment (OECD, 2012) that includes possibilities for working flexible hours as well as potential re-designs of the work environment.

Consider family leave / life events leave.

Consider gap breaks for older staff.

Develop and adopt industry good practice standards including having a clear and transparent age management policy.

Recruit internally to retain existing staff: this includes ensuring that work arrangements support all workers (including the older group) to perform well.

### Retrain

Age should not be a barrier to training opportunities, though it is also important to ensure that training opportunities are appropriate for different learning styles (i.e. not only class room based, online, or informal learning).

Facilitate career change with training for those in physically demanding roles and provide age-differentiated work design and intervention strategies (Hertel and others, 2013).

Take note of UnionLearn's Mid Career Review and, where a trade union is present, consider offering this approach to a wider age range. Also consider broadening the scope to include job design. The pilot project demonstrated a high level of demand and there is a strong case for continued government and national trade union support for the initiative.

Inter-generational mentoring: age diversity in employment (OECD, 2012) and, in particular, in teams (Hertel and others, 2013) contributes to constructive and innovative decision making processes. To do this, it is necessary to balance needs and expectations of older and younger workers in a fair and transparent way (Hertel and others, 2013).

## Recruit

Put in place age monitoring of recruitment. Review results against targets for age diversity.

Consider experience, not just qualifications, when recruiting.

Ensure that eligibility for training is age-neutral. This should include apprenticeships.

## 7. Age management: what we know – and what we need to know

This report has set out the case for good age management. However, the existing literature, voluminous as it is, is not sufficient to equip managers, trade unions, or employees to deal with future uncertainty.

### The UK, the EU and Europe

It will be some time before we understand the consequences of the UK's exit from the European Union and speculation about future prospects for business and the likely labour supply implications, are beyond the scope of this report. The ramifications for discrimination and employment law will be slower to emerge. Whilst the fundamentals of age management good practice will remain applicable, further research will be an urgent requirement.

### Occupational pensions and retirement

The effect of occupational pension schemes is complex. It has long been recognised that membership is an important retention tool and tends to increase employee loyalty (Hannah, 1986) but employees who need to accrue contributions may remain in work despite declining health or capability. If 'flexible' retirement is to be a reality, research is needed, both on the way retirement decisions are reached and on the financial and actuarial implications.

### Retirement and employee relations

Whereas retirement was once simply a fact of life, something that could be predicted at birth, it is now a matter to be discussed and negotiated in the workplace. Productive outcomes rely on good employment relations, but equally, retirement, if poorly handled, has consequences for employment relations. Research is needed to explore what retirement 'means' after the DRA and to evaluate how it varies between workplaces.

## Appendix 1: Note on methods

This report was written between December 2015 and June 2016 as an extended literature review on the broad issue of 'managing older workers'. It has the specific aim of encouraging an expansion of the reactive and laissez-faire UK policy regarding older workers.

To this end, the report is structured around Acas's 7 levers of productivity, which highlight a broader range of issues than is often the case with regards to older workers. In addition, the broader, international literature on managing older workers was taken into consideration to ensure comparisons and contrasts of policy approaches could be undertaken.

The information provided in this report must come with a 'health warning' in that it was impossible to cover all of the literature or review all publications systematically. The subject matter addressed is broad and there is considerable literature that has tangential but not directly relevant foci on the decision making and transition process to retirement; different national economic systems and their

national specific HR system's strengths and weaknesses in relation to older workers (eg Jackson and Debroux, 2016).

The task set was to review literature dating back to 2005 and include international publications. The result is a somewhat mixed picture that covers the areas, time and locations specified but is unable to do so comprehensively within the 4-month time frame available for the study.

In addition to the literature review, this report also draws on a range of empirical data available to the authors, namely:

Firstly, semi-structured interviews with key stakeholders were undertaken as part of the Acas funded research. Each interview covered questions about the 7 levers of productivity as well as general background questions about managing older workers more broadly. A number of quotations from these interviews are included in the text. In total, 5 interviews were conducted with national and international stakeholders: AGE Platform; Age UK; International Longevity Centre UK (ILC-UK), The Age and Employment Network (TAEN) at the Shaw Trust; and the DWP (Fuller Working Lives Group) in January and February 2016. Ethical approval was sought from the University of Leicester before interviews were undertaken.

Secondly, the European Commission funded 'iNGEnBar' Project (Inter-generational Bargaining Towards integrated bargaining for younger and older workers in EU countries) for which the authors of this report undertook the UK component between December 2013 and January 2015. As part of this research, 3 case studies were investigated to establish whether unions and employers were involved in activities that would benefit both older and younger workers. We present a short summary of one of these case studies in Box 1 above as a good example of how a well designed workplace can be achieved. For further information see Beck and Williams (2014).

Thirdly, a pilot study into 'Renegotiating Retirement', funded by the University of Leicester School of Management, which was undertaken between October 2013 and October 2014. This research questioned whether there is a relationship between extending working lives and the use of performance appraisal or performance management for older workers specifically and the workforce as a whole. The first phase of the research consisted of a Freedom of Information (Fol) request to all public libraries, whilst the second part of the research consisted of 10 interviews with managers, employees and trade union representatives in locations where issues emerged from the Fol request and/or to clarify such issues. Data and quotations from both stages of the research project have been included in this report.

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