



Employer Toolkit: Guidance for Managers of Older Workers



Online and Interactive:

<http://ageactionalliance.org/employer-toolkit/>



Employer Toolkit: Guidance for Managers of Older Workers

This Employer Toolkit is a resource offering guidance to managers of older workers. The information available details how employers can better manage their workforce, and by doing so, how they can capitalise on the UK's changing demographics.

The Toolkit includes information relating to the 3 'R's highlighted by the Government's Business Champion for Older Workers, Dr Ros Altmann CBE. These are retaining, retraining and recruiting older workers. Information is also included on a range of other topics including legal requirements, knowledge management and flexible working arrangements.

The guidance is best viewed as a dynamic resource which can be found on <http://ageactionalliance.org/employer-toolkit/>, in partnership with the Age Action Alliance. This interactive page helps to break down the guidance offered in order to enable quicker reading and referral by you, the user.

Research cited within the Toolkit can be found on the final page of the Toolkit.

This Toolkit includes guidance on a general level, relevant to all industries and managers.

[Please note this pack is for help and information only. It is not an authoritative statement of the law, and future changes in the law may make it gradually less accurate. The Department for Work and Pensions and its partners take no responsibility for how you use the information. You should always take professional advice on any specific legal or financial matter].

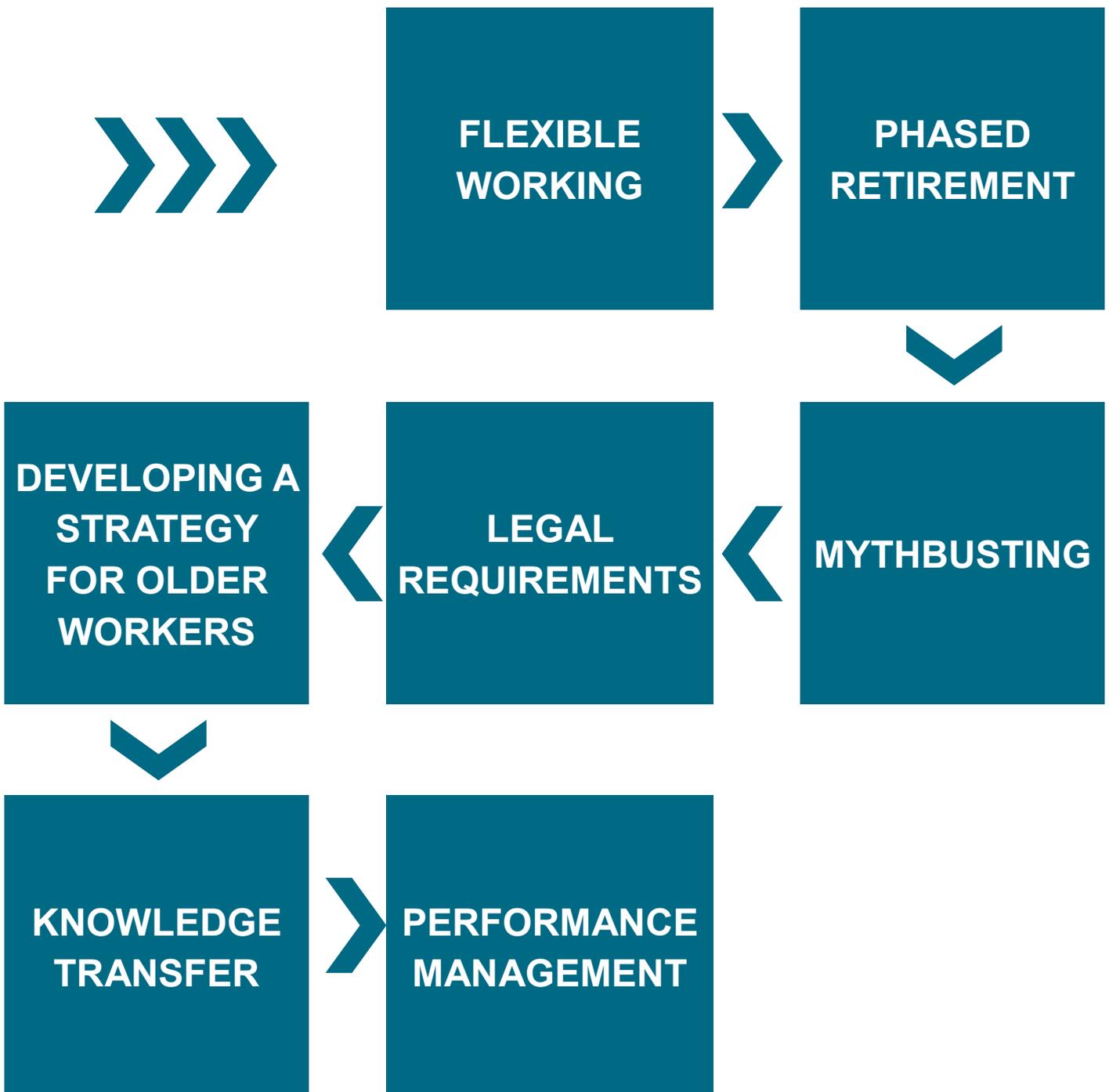


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Understand the associated costs resulting from an employee's unwilling or involuntary absence from the workplace

Address dangerous and/or unhealthy working patterns

Promote healthier lifestyles, both inside and outside work

Challenge presenteeism amongst staff



Recruitment

- Use age neutral language
- Place adverts where older workers will see them
- Promote yourself as an age positive employer
- Ensure agency staff are hired in the same manner
- Evaluate candidates according to values, behaviours, competencies demonstrated and their ability to do the job
- Respect differences within the backgrounds and types of qualification which candidates possess

Retraining/ Redeployment

- Think about the culture of your organisation and how this supports staff retention
- Ensure widespread understanding of the benefits and options for retraining/ redeploying staff
- Identify and evaluate the reasons why retraining is necessary for each individual concerned
- Evaluate if any elements of the job are required to change to support older workers who do retrain
- Invest in existing members of staff and save on recruitment and induction costs

Learning and Development

 Ensure that:

- No employee is denied developmental opportunities as a result of their age
- Access to and provision of learning and development opportunities for older workers is monitored in order to ensure equity of access
- Managers and staff of all ages recognise the personal and business benefits



of continued development in later life

Training is delivered in an appropriate context, and is responsive staff needs

E-training is delivered in combination with more traditional in-work training opportunities

Flexible Working Ensure that:

Managers and staff are aware of the benefits of flexible working arrangements

Flexible working opportunities are actively promoted to staff members

There is a clear process and criteria to apply for flexible working

Managers are confident leading staff who work to different patterns

Managers are aware of the legitimate reasons they can decline flexible working

Requests and agreements for flexible working are monitored to ensure equity of access

Phased Retirement

Encourage retirement and future planning throughout an employee's career

Analyse what phased retirement options can be offered within your business

Evaluate how employees can decrease their hours/ days/ responsibilities in a gradual manner as they approach retirement, in a way which supports service delivery

Consider the relationship between existing flexible working arrangements, and phased retirement options

Review or develop specific policies for flexible retirement within your organisation

Promote and support whatever options are agreed upon



Legal Requirements

Remove all improper references to a default retirement age within literature and corporate policy, and take steps to see that conversations around retirement are appropriately phrased

Ensure managers and staff are aware of, and act in accordance with, equality legislation, which provides for protection from discrimination in, recruitment and employment

Promote awareness amongst employees regarding the near universal right to request flexible working conditions

Ensure all employees know that they are entitled to reasonable adjustments and accommodations within the workplace which result from their disabilities or impairments. Furthermore, all employees have a right not to be discriminated against, directly or indirectly, as a result of any of the nine protected characteristics outlined in the Equality Act 2010: <https://www.gov.uk/equality-act-2010-guidance>.

Developing a Strategy for Older Workers

Recognise the need to develop an organisational strategy relating specifically to older workers

Identify how this strategy will be developed, and how it can be implemented successfully throughout the business

Aim to be proactive, making the most of an ageing workforce and the benefits to be realised

Knowledge transfer

Understand the different types of knowledge which must be passed on in your organisation

Identify which employees possess knowledge which is not duplicated elsewhere



Focus upon staff that have been with the business for considerable periods of time

Develop procedures of knowledge transfer, including mentoring programs

Performance Management

Understand what knowledge, skills and behaviours are required for different jobs; be specific in terms of outcomes required and areas of development

Develop procedures to assess the competency and skills of all staff, regardless of age and potentially using the planning à supporting à reviewing framework

Hold regular discussions with employees regarding all matters of working life and development, not only retirement options

Consider the benefits of promoting Mid-life Career Review options

Where appropriate, do not wait for scheduled meetings - act on issues as they arise

Monitor disciplinary and capability cases by age to identify trends or patterns in your workforce

Further Sources of Help and Support

'**Useful Links**' relevant for each subject area can be found at the end of each section of the Toolkit

Some general sources of support are:

<https://www.gov.uk/government/collections/age-positive> - A collection of many of the Government's publications relating to the Age Positive initiative

<http://www.cipd.co.uk/hr-resources/survey-reports/managing-age-diverse-workforce-views.aspx> - A CIPD guide to managing an age diverse workforce

<http://www.acas.org.uk/media/pdf/e/4/Age-and-the-workplace-guide.pdf> - An ACAS guide to incorporating matters of age into workplace management



http://www.acas.org.uk/media/pdf/4/4/AL09_1_1.pdf - An ACAS leaflet on better managing older workers

<http://ageactionalliance.org/theme/healthy-workplaces/> - An open network aiming to 'help employers to improve the health and productivity of their ageing workforces'



2. The Business Case for Older Workers

Being considerate of a mixed-age workforce, and taking measures to better manage older workers, is not only a luxury for larger firms and businesses with established HR practices. It is a necessity for most firms across the UK looking to grow and prosper. There are many reasons as to why this is the case.

The Demographic Case

A decline in younger staff

- The number of young people in the population is predicted to decline. By 2022 there will be 700,000 fewer people aged 16-49

An older population in work

- Not only will there be a fall in the number of young people nationwide, there will be a corresponding rise in the number of people who may have traditionally been considered as old
- By 2020 over 50s will comprise almost 1/3 of the working age population
- By 2022 there will be 3.7 million more people aged 50 - State Pension age

The Sectoral Case

Promoting effective management of older workers is a necessity across the entire economy.

- The need to retain older workers, before they involuntarily leave the workforce, is consistent across the spectrum.
- Half of economically inactive older men who had worked at some point in the last 8 years previously worked in one of just four sectors: manufacturing, construction, transport, and wholesale/retail
- Two thirds of economically inactive older women who had worked at some point in the last 8 years previously worked



The Wider Economic Case and the Individual Case for Older Workers

- in: education, health/social care, wholesale/retail and public administration
- The guidance offered in this Toolkit could therefore be of help to a large range of businesses looking to retain the knowledge, skills and experience of key staff members

The Wider Economic Case

Good for the wider economy, good for business

- The positive effects of retaining more experienced older employees, and developing their skills and knowledge further, would have a large national impact
- If everyone in the UK were to work one year longer, GDP could increase by approximately 1%
- Furthermore, halving the employment gap between workers aged 50-SPa and those in their late 40s could have seen nominal GDP 1 per cent (up to £18 billion) higher in 2013.

The Individual Case

The benefits of working longer

- Employers need not be scared about encouraging greater engagement from older staff members. This is because releasing the potential of older workers could not only benefit the business; in most cases it could also benefit the individual
- For each extra year in work, an average earner could have around £25000 extra income and increase their pension pot by around £4500 (4%)
- By retiring at 65 instead of 55, an average earner could have over £200,000 extra income and increase their pension pot by 60%



Polling Results and the Intergenerational Case for Older Workers

Polling Results - Attitudes of over 50s to fuller working life

Many individuals have already expressed an interest in working longer⁽¹⁾:

- In 2014, the average age at which respondents said they thought they would stop working and retire was 65.5 for men, and 65.0 for women
- Over half of respondents who had not yet retired said that they had changed their mind over the last few years about the time when they expected to retire
- 74 per cent of respondents would still like to be in work between the ages of 60 and 65

Even amongst those already retired:

- More than one in five missed work and almost a quarter wished they had worked longer
- 36 per cent said that they would advise someone who was thinking about stopping work altogether and retiring to 'consider switching to flexible or part time work for a period first'
- 20 per cent said 'If you can, take a break from work and then make a decision'

The Intergenerational Case

Taking steps to encourage the employment of older workers could also benefit younger people on a national level

- Numerous studies have debunked the 'lump of labour' fallacy; a myth that there are a set number of jobs within an economy and as a result older workers may be guilty of taking younger people's jobs
- In fact, the opposite may be the case – studies have shown that as the number of workers aged 55 and over increases, overall employment rises and unemployment falls ⁽²⁾



The Capability Case for Older Workers and Changes in the Labour Market

- There is even some evidence that younger people's wages may also increase ⁽³⁾

The Capability Case ⁽⁴⁾

Older employees can still contribute based on...

- Their acquired knowledge and skills
'There is evidence that cognitive performance does not generally show any marked decrease until after the age of 70'
- Their physical ability
'Declines in physical capacity can be delayed and minimised with regular exercise in leisure time'

It's Already Happening

The labour market

- In the last 5 years, there has been an increase of over 1 million workers over the age of 50.
- In the last 10 years there has been an increase of nearly 2 million workers over the age of 50.

Over the past 10 years:

- For people aged 50-64 overall employment has increased from 64% to 69%
- For people aged 65 and over overall employment has increased from 6% to 10%.

The corresponding employment rate for people below 50 has been broadly constant of 81% for people aged 25-49. This demonstrates once again that a rise in the employment rate for older workers does not automatically take away jobs from younger people



Polling Results - Attitudes of employers to fuller working lives ⁽¹⁾

- Over three quarters of respondents said that the ‘**experience of workers** aged 50 or over’ was a main benefit of having them in their organisation
- The ‘**reliability of workers** aged 50 or over’ was perceived to be a main benefit by 65 per cent of respondents
- Compared to their younger counterparts, employers said workers aged 50 or over were more (21 per cent) or equally (68 per cent) **productive**
- Workers aged 50 or over were said to be more (53 per cent) or equally (42 per cent) **reliable** than their younger counterparts
- Training for workers aged 50 or over was considered to offer a **good return** on investment by 71 per cent of employers
- **Small businesses** were more likely to report that they did not perceive any challenges of having workers aged 50 and over in the business



Useful Links

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/394642/attitudes-over-50s-fuller-working-lives.pdf – A breakdown of polling detailing the attitudes of over 50s to fuller working lives

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/319948/fuller-working-lives-background-evidence.pdf - Background evidence relating to the fuller working lives agenda

<http://www.ons.gov.uk/ons/interactive/uk-national-population-projections---dvc3/index.html> - An interactive graphic of future UK demographic and population projections

<http://www.cipd.co.uk/hr-resources/survey-reports/age-diversity-smes-reaping-benefits.aspx> - A study of attitudes towards 'age diversity in the workplace in small and medium enterprises (SMEs)'

<http://www.acas.org.uk/index.aspx?articleid=5004> – An article on the business case for retaining older workers



3. Understand your Business/ Organisation

To Do

- Develop an age profile for your workforce, using one of the existing tools or by creating your own audit
- Discover patterns and relationships through analysis of the data collected
 - Find differences between age groups, i.e. are older staff less likely to attend training programmes, or have specific patterns of sickness, absence or retention?
- Consider future projections of staff, resource requirements and demographic changes. Where will your staffing needs exist in the future?
- Plan and act upon these results

What

In this instance, an age profile is an assessment of the **demographic distribution** according to age in a working environment. It is often expressed through age brackets and contrasted against multiple **aspects of work**, i.e. flexible working patterns adopted, or protected characteristics, e.g. gender.

Why

Understand more about your employees' attitudes to age in the workplace

Understand the needs of staff and better position your responses

Discover previously concealed patterns, and insights that employees may not otherwise share

Demographic information can help you to identify if you are successfully recruiting and retaining older workers

Age profiling teams, departments or whole organisations can assist employers to plan ahead, where there are groups of staff who may retire at similar times

How The **ACAS Age Audit** Tool allows you to '*assess employees' attitudes*



towards age and age related issues in their workplace.’ It is free to use, and is automated to provide cumulative results.

<http://www.acas.org.uk/index.aspx?articleid=4874>

It allows you to monitor changing age demographics within your workplace and take steps to accommodate them where necessary.



If you are looking to evaluate a trend across many years, or want to have more control over the variables you compare, it may be necessary to take further action.

Build an age profile of your workforce by examining past datasets and staff surveys, whilst also asking new questions to fill gaps in the data.

Aim to catalogue information which allows you to see patterns between age, and other variables of interest

Having collected the required data, **analyse it** to answer a wide variety of questions. If you find you do not have the information to provide the answers, consider what questions you could ask to collate that information in a later round of polling.

How does the age profile of the workforce compare against internal factors?

- Is it representative of an inclusive and diverse work force?
- Does it change across different strands of the organisation, i.e. customer facing vs. non-customer facing? Team member vs. managerial?

How does the age profile of your workforce compare against external factors?

- Is it representative of the local labour force, jobseekers and new hires?
- Is it representative of its customers and clients?
- Would it be better perceived if it was more representative of its clientele/ service users?

Can it help you to focus upon areas of improvement in your business?

- Can it identify a pattern amongst staff leavers, i.e. do people tend to leave particular job roles or departments at a certain age? Will you have to fill specific skills shortages?



- Can it identify a pattern amongst jobseekers, i.e. are an increasing number of over 50s applying for jobs which offer flexible working conditions?

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Legal Employers are allowed to collect demographic information from their staff, provided that they follow the appropriate legal protocols and data protection requirements

Myth 'I already know everything about my employees – including their ages! An age audit of any sort is a waste of time'

Fact An age audit is not only about knowing how old your staff are. It is about identifying what this means for future business needs, employee wellbeing and customer satisfaction

Useful Links

<http://www.acas.org.uk/index.aspx?articleid=4874> – ACAS Age Audit Tool, free to use for all and automated to provide cumulative results



4. Designing Work for Older Workers – Successful Retention of Over 50s

To Do

- Understand the reasons why older people leave the workforce before they really want to or are ready to
- Identify those within your organisation who may be at risk of early departure
- Take steps to increase Work Ability for staff, respecting that each staff member is likely to have different constraints upon their productivity
- Develop a program of continuous adjustment - in line with the needs of your workforce

What

Work Ability measures the inter-relationship between the ‘the work capacity of a worker’ and the ‘work he or she does’. As such poor, or low, work ability identifies an employee with **a greater capacity to do work than that which they are currently doing.**

This capacity could be unlocked and Work Ability could improve, if the necessary adjustments and accommodations are made

This would allow the employee to realise their full capacity, and it would benefit the business as a result

The overall implication of Work Ability is that **better designed work** will lead to more productive work, and this means that the employer should address the problems faced by older employees.

Why

As section 2 of this Toolkit demonstrates, the business case for employing and retaining older workers is extremely strong. Getting the best from our ageing



workforce would benefit employers, older people themselves, and the wider economy.

However in order to retain staff, businesses must **understand why older employees may unwillingly leave the workforce, and act accordingly.**

Health and/or disability issues

Caring responsibilities

Desire for a better work-life balance

Lack of development or variety

Discriminatory working environments

This information may be more apparent if an age audit is conducted.

Elsewhere in this toolkit, there are specific sections recognising health and safety at work, flexible working arrangements, training, and discriminatory actions.

However, a general approach encompassing knowledge of Work Ability and accommodations of staffing needs is also required.

How

The two factors which have been identified as **increasing Work Ability** the most are;

Training and guiding managers to better accommodate the needs of older workers on an individualised basis

Decreasing repetitive movements and adding more variety within a role

However, because a vast number of adjustments can be made to improve 'Work Ability', it is best to retain focus by considering how work **can** be designed across broad themes, instead of trying to follow prescriptive recommendations of how **it should** be designed.

This could mean changes or adjustments to

Work tasks

Organisational objectives

Training provided

Technology utilised



Environmental and organisational structures

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Legal All disabled employees are entitled to reasonable adjustments in the workplace or their working arrangements, which arise as a result of their disability. All employees have a right not to be discriminated against

Myth If an older worker cannot do the job at hand, it is because their age has 'caught up with them', and they can no longer be effective in the workplace

Fact The workplace poses different barriers for everyone. Identifying where staff Work Ability could be improved, and acting upon it, could help retain them within your organisation

Useful Links

<https://osha.europa.eu/en/publications/articles/promoting-active-ageing-in-the-workplace> - A study providing details of, and suggestions for, the implementation of Work Ability

<https://obs.acas.org.uk/modelworkplace/Landing.aspx> - A tool to help you 'assess and improve your people management in the workplace'

<http://www.dementiaaction.org.uk/assets/0000/9168/>

[Supporting_employees_who_are_caring_for_someone_with_dementia.pdf](#) - A guide for employers of those individuals caring for someone with dementia

<https://www.tuc.org.uk/sites/default/files/Older%20workers%20april%202014%20pdf.pdf> – A TUC guide on the health and safety requirements of older workers

<http://www.cipd.co.uk/hr-resources/factsheets/job-design.aspx> - An introduction to, and outline of, the key aspects of job design



5. Health and Safety

To Do

- Understand the associated costs resulting from an employee's unwilling or involuntary absence from the workplace
- Address dangerous and unhealthy working patterns
- Promote healthier lifestyles, both inside and outside work
- Challenge presenteeism amongst staff

Why

Direct (Financial) Costs	Indirect Costs
<ul style="list-style-type: none">• Continued payment of the employee's salary and national insurance contributions (sick pay)• Payment of overtime incurred by other employees covering the workload• Potential increase in insurance, legal and associated fees• Payment for temporary/ replacement staff	<ul style="list-style-type: none">• Loss in output/ production, and follow-up business• Diminished product quality, provision of services and/or reputation• Lost knowledge and skills developed through training• Business/ administrative costs of arranging cover, hiring a replacement and providing appropriate training

Employers have a **legal responsibility** to provide safe working environments with appropriate accommodations and precautions taken.



Older workers are still physically capable, **IOSH and HSE research**⁽⁵⁾ concluded:

‘There is evidence that cognitive performance does not generally show any marked decrease until after the age of 70’

‘Declines in physical capacity can be delayed and minimised with regular exercise in leisure time’

Reduction in muscle strength may decline as an employee ages, but it is only likely to affect work after the age of 65

- Furthermore, reduction of muscle strength can be slowed, or even reversed, by training the muscles needed

Poor work conditions, i.e. repetitive work and poor posture can cause health related problems regardless of age

Where changes to physical factors such as aerobic capacity do occur, they can often be ‘prevented or reduced by physical activity’

People’s reactions get slower with age but this can be offset by increased accuracy, accumulated knowledge and experience

The risk of non-fatal serious injury is lowest amongst older workers

How

Good management of older workers’ health is good management of the health of all workers.

- In order to develop appropriate accommodations, an objective assessment of job requirements can highlight what is the **required level of physical and mental ability**
- Policies which promote health should be multifaceted; they should account for physical activity and interventions, dietary advice and intellectual stimulation

When making accommodations for all staff you can ask;

- Is there an **appropriate balance** within the work-rest schedule?
- Have measures of risk assessment and reduction been implemented?
- Are there appropriate reporting procedures for people who need to report health and safety concerns at work?



It may be helpful to understand the following factors that concern roles involving shift work:

As a result of excessive shift work, the health of older workers may deteriorate more rapidly than that of their younger colleagues⁽⁶⁾.

Therefore it may be **useful to consider**:

- Limiting exposure to night work for workers who are less physically able
- Giving older workers priority to transfer to day work
- Increasing rest periods and arranging regular health checks

Presenteeism is a workplace culture that makes people feel that they should be at work even though they are unwell. It can lead to a loss of productivity and output which results from employees who conceal ill health in the workplace, and subsequently are less efficient in their jobs.

Presenteeism from **mental health alone** costs the UK more than £15bn annually; considerably more than the cost of absenteeism – the financial loss created by absence from the workplace, which is valued at £8.4bn⁽⁷⁾. Furthermore, health conditions currently causing presenteeism are often the **drivers for absenteeism** in the future.

Act

Be aware of the danger of presenteeism within your workforce

- Ensure managers are alert to the possibility of staff under-performing due to underlying health difficulties

Measure and analyse for patterns using staff data

Have an open door policy and encourage staff to share their concerns with either their manager, or a separate person

- This could be achieved by signposting to other areas of support

Take active steps to promote healthier working patterns, such as further flexible working opportunities and accommodations to better support specific health or disability requirements

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Legal Businesses have a legal responsibility to promote and build safe working



environments

Myth Older workers are fragile, and suffer from inevitable absences. They are all ill suited to physical jobs

Facts Many older people over the age of 50 can continue in work if they are offered the right support and management. Age alone is not an indication of ill health or weakness

Useful Links

<http://www.hse.gov.uk/vulnerable-workers/older-workers.htm> – Further information and guidance relating to the health and safety of older workers

<https://www.tuc.org.uk/sites/default/files/Older%20workers%20april%202014%20pdf.pdf> – A TUC guide on the health and safety requirements of older workers

http://www.enwhp.org/uploads/media/ENWHP_Guide_PH_Work_final.pdf - A good practice guide on managing those with a chronic illness at work

http://www.bitc.org.uk/sites/default/files/managing_presenteeism.pdf - A guide on '*Managing Presenteeism in the Workplace*'

http://www.iosh.co.uk/~media/Documents/Books%20and%20resources/Published%20research/IOM_Ageing_lite_report.ashx – '*An assessment of the health, safety, and health promotion needs of older workers*'

<http://www.iosh.co.uk/~media/Documents/Books%20and%20resources/Published%20research/Post-retirement%20age%20workers%20and%20health%20and%20safety%20full%20report%20v3.ashx> – A report on '*Post-retirement age workers and health and safety*'



6. Recruitment

To Do

- Use age neutral language
- Place adverts where older workers will see them
- Promote yourself as an age positive employer
- Ensure agency staff are hired in the same manner
- Evaluate candidates according to values, behaviours, competencies demonstrated and their ability to do the job
- Respect differences within the backgrounds and types of qualification which candidates possess

Why

Older workers have talent, experience and knowledge

Widening the pool of potential recruits can increase the quality and productivity of an organisation

Age discrimination is unlawful unless it can be objectively justified

As people from mixed-age backgrounds develop and mature together, this brings benefits to the organisation through recognition of different experiences and shared learning practices

Older workers are a growing demographic; they are your customers or service users, and soon a critical mass of the potential workforce. You cannot afford to ignore them

How

When advertising and broadcasting employment opportunities, active steps and accommodations may be necessary in order to reach older jobseekers.



Advertising and Promoting Jobs

Use age neutral language

- Recruitment materials should not cite age as a requirement- in all but a handful of cases this is illegal
- Recruitment materials should not use euphemisms or synonyms for age, such as a 'recent school leaver', or someone who is 'fresh'

Find and engage older workers

- Consider why older people may not be applying for the jobs posted; although many will be on social media and job hunting sites, many others will not
- Clear indications of when your organisation is hiring can help avoid confusion and encourage people of all ages to apply
- This is especially important online, as frequent changes to web pages may confuse otherwise willing jobseekers

Promote your company, its diversity and inclusiveness, to jobseekers

- When advertising, say that you welcome applications from people of all ages
- Describe the accommodations you make to support older workers and all those who require greater flexibility, i.e. highlight flexible working hours if offered

Hold recruitment agencies that you work with to the same standard

- Tell them that you are interested in capable employees of any age
- Tell them what measures you take as a business to help your ageing workforce, and encourage them to explain this to all jobseekers



Evaluating and comparing candidates

Challenge unconscious bias and assumptions made

- Do not assume knowledge of an individual's health or fitness based on age
- Do not assume knowledge of length of expected service

Respect and embrace differences

- An older jobseeker may have different qualifications to a younger one. As methods of standardised testing do change and evolve, hire on the basis of ability, not only on what type of assessment was sat
- Focus on whether the candidate has the right values and behaviours, and can manage the competencies required, not whether they match the existing age-profile of the profession, or previous post-holder.

Ask the right questions, in the right environment

- Ask all candidates the same basic set of questions using different questions to probe and draw out further information where appropriate
- If interviewing by panel, consider a mixed-age panel
- Asking only older workers about plans to retire may be viewed as discriminating against them because of their age. Instead consider asking all employees about where they see themselves in five years time
- Separate personal details at the beginning of the sifting process and re-introduce them towards the end

Legal In most cases it is illegal to discriminate in the recruitment process on the basis of age

Myth There is no point in hiring older workers as they will retire quickly, before they have contributed to the business or developed skills within it

Fact Older workers often stay for longer than their younger colleagues in a post



7. Retraining/ Redeployment

To Do

- Think about the culture of your organisation and how this supports staff retention
- Ensure widespread understanding of the benefits and options for retraining/ redeploying staff
- Identify and evaluate the reasons why retraining is necessary for each individual concerned
- Evaluate if elements of the job are required to change to support older workers who do retrain
- Invest in existing members of staff and save on recruitment and induction costs

Why

To continue to make use of, and build upon, the skills, knowledge and resources already invested in your employee

To save on the costs associated with recruiting someone new to the business, including the recruitment and administrative burdens created

To allow more efficient knowledge transfer; knowledge does not leave the workplace, but is instead available with the same employee in their new role

To allow a trusted and valued employee to continue in the organisation

How

Retraining/ redeployment should have as its focus the identification of a new placement which:

Utilises and builds upon the existing abilities of the older worker

Accommodates the requirements of the staff member and their motives



behind redeployment

In order to identify the best path for retraining, you must first understand why it is that the person is in need of retraining.

Why does someone need/ want to leave their previous role?

Health and illness concerns caused by the repetition of a particular action/ aspect of their work/ working environment

Health and illness concerns caused by external factors which necessitate reasonable adjustments and accommodations and/ or a change in working pattern

Caring responsibilities which require a change in working arrangements

A reduction in the number of staff working in their area

A desire to change their working pattern and potentially adopt flexible working conditions or part-time hours

Some of these factors may be addressed through reasonable adjustments and accommodations being made, thereby allowing the older worker to be retained in their previous role.

However, in other cases accommodations may only be part of a larger process to retrain/ redeploy the employee.

What aspects of their role need to change so that they can continue in work?

Work cultures which challenge/ discourage those who are redeployed

Managerial requirements that mandate fixed working conditions, in time and location, where there is no business need

Physical exertions and repetitions which are no longer healthy

Equipment which can no longer be managed efficiently or securely

When deciding whether an older worker is in need of retraining, it is essential to **identify what competencies** and actions are currently required from them.

Following this, a manager must ask whether these skills can continue to be exercised if previously restrictive factors are challenged, and suitable accommodations are made.

If this is not the case, then **retraining for another role** may be the best option for all involved.



Mid-life Career Review

A Mid-life Career Review is an opportunity for people who are in their late 40s/ early 50s to take stock, review their options and **plan for the future**. The Review process aims to help people to manage their careers, find further relevant information, develop an action plan and address the life issues they face.

The Review process is currently being trialled by NIACE (<http://www.niace.org.uk/current-work/mid-life-career-review>) in a project looking to develop and test different models

.....

Legal Providing opportunities for redeployment/retraining is a legal requirement in certain industries. Therefore, it is essential that managers are able to recognise why an employee has left their last role, and the restrictive elements of that role which must be addressed

Myth Older workers are too old to retrain. They are not interested in changing career path, even if it is within the same sector

Fact Provided that the options they have address their needs and support their development in the workplace, many older workers are happy to continue their working lives in new areas

Useful Links

<http://www.niace.org.uk/current-work/area/older-adults> - The National Institute of Adult Continuing Education, 'Older Adults' area

<http://www.niace.org.uk/current-work/mid-life-career-review> - An outline of the Mid-life Career Review project

<https://nationalcareersservice.direct.gov.uk/advice/planning/Pages/olderworkers.aspx> - National Careers Service information for older workers



8. Learning and Development

To Do

Ensure that:

- No employee is denied developmental opportunities as a result of their age
- Access and provision of learning and development opportunities for older workers is monitored in order to ensure equity of access
- Managers and staff of all ages recognise the personal and business benefits of continued development in later life
- Training is delivered in an appropriate context, and is responsive to the needs and capabilities of staff
- E-training is delivered in combination with more traditional in-work training opportunities

Why

Learning and development opportunities should be available to older employees.

Older workers can benefit just as much as younger colleagues when offered the opportunity to build upon their skills

Continued learning and development can build upon existing skills in older workers, rather than having to create and instil them anew

Developing the talent within your existing workforce will allow them to better compete with potential hires, thus saving money and time on recruiting staff

Age is not an automatic indication that staff will be less willing to consider training, provided that their requirements and existing knowledge are accommodated



Evidence shows that older workers in good health and with up to date training are equally productive as their younger counterparts⁽⁸⁾. Training can be a good opportunity to identify areas for long-term improvement and career progression

If training is not offered because of age, employees may be able to bring a case of age discrimination

How

Seek to identify

Why older workers might be reluctant to attend training

- A lack of confidence and an aversion to being evaluated and compared
- Disinterest because they do not believe they have benefitted from past training
- Disinterest because they are frustrated/discouraged by the method of delivery and the organisational context of training

Whether elements in work may prevent access to training for older workers

- Only younger workers are referred for learning and development
- Unfair assumptions are held that all older people are unable to learn new skills, or that they are disinterested/insulted when asked to participate

Create an expectation that all workers are expected to carry out appropriate training

This expectation can be upheld within employment contracts, promotion exercises, and the overall corporate culture

Demonstrate that your business values learning and development at all levels and all stages of an individual's career



Build better programmes of training, learning and development

The delivery of training

- Training is delivered in a manner which is comfortable to those undertaking it
- Where possible allow for training on the job alongside more traditional classroom environments
- Training is adaptive; different people learn in different manners and some will benefit more in certain environments where others will not
- Promote training which is experiential and pragmatic; those involved are practicing the skills required as they are learning them

The content of training

- Ensure that instructors take account of and are empathetic towards the requirements that older workers are likely to have, i.e. dual caring responsibilities
- Training is designed following consultation with older workers, to ensure buy-in, ease of use and relevant skills offered
- Training recognises prior skills learned, knowledge gained and relevant experience
- Identify areas where older workers have specific training needs.
- E.g. Older workers can often act as mentors in the workplace, so it is imperative that sufficient training is provided to ensure that this relationship is mutually beneficial

E-training

Include all workers, regardless of age, and do not assume that older workers are disinterested or technologically unaware

Where possible, use in tandem with practical and verbal training

For staff who are less confident, the use of paper-based 'how to proceed/complete' instruction booklets with screen shots can help



.....

Legal If older workers are offered less training, learning and development opportunities than younger colleagues in an equivalent role, they may have a case for age discrimination

Myth Only younger people are interested in learning and developing. Older workers are often annoyed by being asked to complete training

Fact This is typically only the case when the training being offered does not build upon the skills and talents of the older worker, and forces them to replicate competencies which they have already demonstrated

Useful Links

<http://www.niace.org.uk/current-work/area/older-adults> - The National Institute of Adult Continuing Education, 'Older Adults' area

<http://www.niace.org.uk/current-work/mid-life-career-review> - An outline of the Mid-life Career Review project



9. Flexible Working

To Do

Ensure that:

- Managers and staff are aware of the benefits of flexible working arrangements
- Flexible working opportunities are actively promoted to staff members
- There is a clear process and criteria to apply for flexible working
- Managers are confident leading staff who work to different patterns
- Managers are aware of the legitimate reasons they can decline flexible working
- Requests and agreements for flexible working are monitored to ensure equity of access

What

There are many different flexible working arrangements. Those detailed here involve flexibility in the **hours/ days worked**, rather than in respect of location or responsibility.

**Part-time Working**

- An employee chooses to reduce their hours/days or tasks, alongside their pro-rata benefits. This is the most common form of flexible working and may be used in tandem with others
- It allows businesses to retain talented staff, whilst offering older employees more time outside the workplace for other considerations, i.e. caring for their loved ones

Job Share

- When 2 or more employees are responsible for one role between them. This is often paired with part-time working as 2 people on limited hours complete the role of one person
- By allowing 2 people to input into the same role, businesses can ensure a constant presence during traditional working hours
- They can also benefit from the employees' combined expertise, although there may be associated costs in facilitating the employment of 2 people

Flexitime

- Flexitime allows employees to alter their defined hours of work on a regular basis. By working more than their contracted hours at one stage, an employee may, with their manager's permission, take that allotted time off on a separate occasion
- This ensures that, on average, a full working week is completed, but staff are still provided with flexibility, i.e. allowing them to collect their children from school

Compressed working week

- An employee commits themselves to completing the hours for a certain number of days, often a typical working week of 5 days, in a shorter period of time, i.e. 37.5 hours over 4 days
- They work more than the traditionally allotted hours per day, and as a result maintain a strong connection with the business



Career break/ unpaid leave	<ul style="list-style-type: none">• Older employees are often attracted to this option as it allows them to take a longer and well deserved break after an extended period in work• Many people return to the workplace energised and with greater motivation if they are allowed a longer break instead of retirement
Additional planned unpaid leave	<ul style="list-style-type: none">• An employee has additional unpaid leave; either on a regular occurrence such as 2 weeks off every 2 months, or as part of their overall remuneration package, i.e. an additional 20 days of unpaid leave to be taken with agreement across the year
Retirement Pool	<ul style="list-style-type: none">• A company and its willing retirees maintain contact, with the possibility that those retirees could return to work on a temporary basis. This could occur when the company is experiencing a surge in demand, or an unexpected reduction in staff
Fixed term contract	<ul style="list-style-type: none">• An employee is contracted for a fixed-time period, possibly to provide extra support until the end of a project/ posting. This can be on a seasonal basis, in accordance with demand, or as an older worker's final posting before retirement

Why

Increased efficiency and profitability – having a flexible workforce means that your business can be more responsive during peak times, more adaptive and more available for customers

- It can also make you more attractive to jobseekers and therefore widen the pool of potential employees

Higher retention – Providing greater flexibility for staff may help your business become a more attractive place to work. Employees and managers may benefit from increased job satisfaction which results from greater flexibility. Therefore, they may be less likely to look for work elsewhere



Legal responsibility – the right to request flexible working conditions has been extended to almost everybody. Businesses must consider each statutory request, and they can only be rejected in line with one or more of the eight reasons in accordance with the ACAS Statutory Code of Practice

Save money – office and development space is often the largest cost for many smaller businesses. Having fewer staff in the office at any one time could allow savings in this area

How

Establish clear rules for flexible working arrangements which are adopted, in order to maintain structure and discipline in the workforce

Develop a plan setting out how your business will handle flexible working requests

- Identify the flexible working patterns which the business would be able to support
- Encourage employees to participate where appropriate

Ensure strong levels of communication,

- With employees who may apply for flexible working arrangements
- With managers who may have to decide upon, and manage, flexible working arrangements
- Between those in the workforce who may be affected by changes made

A statutory right to request

Employees have a statutory right to request flexible working arrangements and have them considered in line with **ACAS' Statutory Code of Practice**.

This code of practice can be found here: <http://www.acas.org.uk/index.aspx?articleid=1616>

Each employee can make one such request per year, and as a result of exercising this right, an employer must act in a reasonable manner in accordance with the Statutory Code of Practice.

One part of this is that rejection can only be for one (or more) of the 8 reasons stated in the ACAS' Statutory Code of Practice:



the burden of additional costs

an inability to reorganise work amongst existing staff

a detrimental impact on quality

an inability to recruit additional staff

a detrimental impact on performance

detrimental effect on ability to meet customer demand

insufficient work for the periods the employee proposes to work

a planned structural change to your business

A non-statutory request

Outside of the statutory request, an employee may ask to work flexibly at anytime, and as many times as they wish.

However in these instances an employer can handle these requests anyway they think best and accept/reject a proposal for any (non-discriminatory) reason whatsoever.

.....

Legal The right to request flexible working now applies to almost all individuals who have worked for their employer for more than 26 weeks

Myth Flexible working arrangements are inherently inefficient and unproductive

Fact When properly managed, flexible working can ensure that employees remain attendant, engaged and motivated. This in turn could generate productivity and efficiency gains

Useful Links

<http://www.acas.org.uk/index.aspx?articleid=1616> - ACAS Statutory Code of Practice for flexible working arrangements

<http://www.acas.org.uk/media/pdf/1/a/The-right-to-request-flexible-working-the-Acas-guide.pdf> – A guide providing further detail regarding the right to request flexible working

<http://www.cipd.co.uk/hr-resources/factsheets/flexible-working.aspx> - A factsheet including different types of flexible working adjustments

<https://www.gov.uk/flexible-working/overview> - An overview of flexible working



10. Phased Retirement

To Do

- Encourage retirement and future planning throughout an employee's career
- Analyse what phased retirement options can be offered within your business
- Evaluate how employees can decrease their hours/ days/ responsibilities in a gradual manner as they approach retirement, in a way which supports service delivery
- Consider the relationship between existing flexible working arrangements, and phased retirement options
- Review or develop specific policies for flexible retirement within your organisation
- Promote and support whatever options are agreed upon

What

Phased retirement is the **gradual reduction** in hours/days an employee spends at work, before they leave employment for good.

It is the opposite of the traditional notion of a **cliff-edge retirement**, whereby an older worker would transition overnight from a full working week to no involvement in the labour market. It may help people work for longer if they want to.

Phased retirement options may differ from normal flexible working accommodations in two ways:

They may include an 'end-date', at which the employee agrees to completely transition out of the labour market or decrease their hours even further

They may make reference to a pension, particularly where an occupational pension has been accumulated in the same workplace



Many older workers will utilise flexible working patterns as the first step towards retirement, with phased retirement being their preferred option.

However, not all older workers opting for flexible working opportunities are doing so on a set path to retirement.

- Many will plan to work in their new arrangements for years to come and some may even choose to return to a more traditional working arrangement in the future, for example if they have fewer caring responsibilities

Why

Knowledge transfer is likely to be more successful where phased retirement is available. This is because as one person decreases their hours in the workplace, another can be recruited to fulfil those hours not undertaken. This facilitates a highly effective induction for the new employee and allows for one-on-one interaction between the colleagues, and the personal transfer of knowledge

Staff retention may improve as older workers do not feel the pressure of a full working week all the way up to their retirement. Instead they have an earlier and continuous opportunity to transition to retirement and become accustomed to greater freedom from work

Succession planning may be made easier due to both greater rates of retention and improved mechanisms of knowledge transfer

How

For larger employers, it may be necessary to create formal structures of phased retirement. This can prevent confusion and ensure phased retirement programs are administered consistently and effectively.



In formal schemes it is important to consider the following:

Management assesses each claim according to a clear and structured criteria.

For example, evaluating the impact phased retirement may have on

- The continuing operation of the business
- Customer satisfaction with the service provided
- The skill requirements within the team

Open communication;

- regarding the availability of phased retirement options and the manner in which proposals are evaluated
- discussing the benefits of phased retirement to staff
- Employers should not be afraid to 'sell' the positive aspects, including an improved work-life balance

When considering implementing a phased retirement policy, there are many important factors to consider.

The legal requirements of the employer to consider requests for flexible working conditions and to implement reasonable adjustments and accommodations for disabled employees

The age at which employees will be permitted to join the phased retirement program

The relationship between any occupational pension programs and phased retirement

How such measures may impact on projected labour and skill shortages

How knowledge transfer will be managed, particularly between key employees

Whether there has been sufficient communication with employees, and the extent to which they have signalled their interest



Variations in phased retirement/ Preparing for retirement

Wind down	Staff continue in their current roles but adopt flexible working hours. For example, they may become part-time and reduce the hours or days worked per week. Or they may have regular unpaid leave, allowing them more time out of the workplace to pursue other activities
Step down/ Bridge job	Staff take a different role, with fewer responsibilities within the organisation. Their experience and knowledge is maintained and they are able to continue at work, whilst balancing fewer tasks
Time out	Staff are able to take an extended break to pursue outside interests before they return to work. This could prevent burnout and refocus staff who have been working for many years
Taking your pension	There are pension products available that allow you to continue to work and to draw upon your pension. Some of these allow you to leave part of your pension invested
Retirement pool	This is not a traditional phased retirement program. Instead, it is when employees who have retired remain in contact with their past employer, with the option of returning to work on a temporary basis, i.e. to help complete a certain project, or on a consultancy basis

.....

Legal There are certain legal requirements around drawing upon your pension. Seek guidance from accredited professionals or the schemes themselves before integrating them into your phased retirement offer

Myth Employees are disinterested in phased retirement programs. No one will want to stretch out the process of retiring, or even work after State Pension age

Fact Many older workers appreciate the numerous social and financial benefits of continued work. They could be interested in continuing in the workplace if the



right working pattern was on offer

Useful Links

<http://www.acas.org.uk/index.aspx?articleid=1283> – A guide to promoting and managing flexible working and work-life balance

<http://www.acas.org.uk/index.aspx?articleid=1616> - ACAS Statutory Code of Practice for flexible working arrangements

<http://www.acas.org.uk/media/pdf/1/a/The-right-to-request-flexible-working-the-Acas-guide.pdf> - Guide to the right to request flexible working

<http://www.cipd.co.uk/hr-resources/factsheets/flexible-working.aspx> - A factsheet including different types of flexible working adjustments and the legal position

<https://www.gov.uk/flexible-working/overview> - An overview of flexible working requirements and processes



11. Mythbusting

MYTH	REALITY
Only younger employees are keen to develop their skills or learn new ones	Many older workers are just as keen to develop their skills as their younger colleagues. However, it is possible that they are not asked to attend training as often as their younger colleagues. Older workers will also have more experience learning and developing within a work environment, making them well suited to benefit from any future training opportunities
Older workers are set in their ways and inflexible	This is an outdated assumption, and many older workers will have experienced considerable change throughout their working and personal life, improving their resilience and adaptability
Older workers are just waiting to retire. They are inefficient and unproductive	The ability of someone to do their job is rarely age-dependent; there is no need to assume that an older worker is less effective or less motivated than a younger colleague. In fact, many older employees may have grown and developed in the workplace as a result of training and experience. An efficient and productive mixed-age workforce makes sense for many organisations
Older workers will always miss too much work due to illness/ disability	Even though some older people (like every age group in the working population), have a long term disability or illness, many can continue in work with effective management. Whether this requires small physical adjustments or flexible working arrangements, actively managing those who do have health concerns or a disability can ensure lower staff turnover and fewer sick days



MYTH	REALITY
Older workers do not understand new technologies	Equally there may be aspects of work which younger people are less comfortable with, i.e. legacy IT systems. What is important is that where either case is true, appropriate measures are taken to train staff and identify and address gaps in skills and knowledge
Older workers are weak and cannot do manual jobs	For most people, age and strength are not inherently connected until a point much later in life than they would typically consider working. Rather than age, exercise, nutrition, and other lifestyle factors are bigger influences than age on of the relative strength required in the workplace. If strength or stamina does become an issue, an employer must consider how accommodations or retraining within the workplace can support staff
Older workers cost more than younger ones	If this results from a merit-based allocation of pay, than it is often justified, as the older worker may bring more experience to a job which demands more responsibility. However, if differing salaries are not as a result of merit, but solely because of age, than a case could be made for age discrimination



12. Legal Requirements

To Do

- Remove all improper references to a default retirement age within literature and corporate policy, and take steps to see that conversations around retirement are appropriately phrased
- Ensure managers and staff are aware of, and act in accordance with, equality legislation, which provides for protection from discrimination in recruitment and employment
- Promote awareness amongst employees regarding the near universal statutory right to request flexible working conditions
- Ensure all employees know that they are entitled to reasonable adjustments and accommodations within the workplace resulting from their disabilities or impairments. Furthermore, all employees have a right not to be discriminated against, directly or indirectly, as a result of any of the nine protected characteristics outlined in the Equality Act 2010: <https://www.gov.uk/equality-act-2010-guidance>

How

Develop an equal opportunities policy with older age issues sufficiently supported

Ensure management are trained to appropriately handle flexible working requests, and reasonable adjustments and accommodations

Communicate with staff clearly and on regular occasions so that they are aware of their rights and responsibilities under the law

Make use of appropriate legal advice to protect your rights as an employer and those of your staff

Abolition of the default retirement age

There is no longer a default retirement age at which employees must



leave the workforce. There exist very few remaining circumstances in which an employer may choose to dismiss someone on the basis of age

Normal performance standards should apply and, whilst the decision to retire should remain the employees', employers are able to dismiss them following standard performance/ disciplinary methods if they are not performing satisfactorily – just the same as for younger workers.

How

Develop an equal opportunities policy with older age issues sufficiently supported

Ensure management are trained to appropriately handle flexible working requests, and reasonable adjustments and accommodations

Communicate with staff clearly and on regular occasions so that they are aware of their rights and responsibilities under the law

Make use of appropriate legal advice to protect your rights as an employer and those of your staff

Abolition of the default retirement age

There is no longer a default retirement age at which employees must leave the workforce. There exist very few remaining circumstances in which an employer may choose to dismiss someone on the basis of age

Equality Act 2010

Discrimination

Staff are legally protected from being discriminated against as a result of any of the following protected characteristics; age, sex, sexual orientation, pregnancy or childcare, disability, race, religion, being or becoming a transsexual person, marriage and civil partnership.

Within the workplace this extends to matters of redundancy, dismissal, pay, benefits, training and employment

However some matters of 'age based treatment may still be lawful if it can be objectively justified'; <http://www.equalityhumanrights.com/your-rights/equal-rights/age/when-age-discrimination-lawful>



Different Types of Discrimination

Direct discrimination

- Treating an employee less favourably than another because of a protected characteristic that they have. For example, not promoting workers above a certain age, regardless of talent and experience, could be seen as discriminatory

Indirect discrimination

When a practice, policy or rule is applied to everyone within an organisation and as a result...

- A group which hold a protected characteristic are placed at a comparative disadvantage to others
- An individual who holds a protected characteristic is placed at a comparative disadvantage to others **and....**
- ... **The** employer cannot demonstrate that the practice, policy or rule is a proportionate mechanism to achieve what is recognised as a legitimate aim under the law

Associative discrimination

- Treating an employee less favourably because they are thought to associate with someone of a protected characteristic

One example of indirect discrimination would be that managerial attitudes only focus upon training opportunities for younger staff, even though there is no rule forbidding the involvement of older staff. Another would be if staff participated in a regular test of their physical capabilities, and passing it was necessary to continue in work. If this test was not relevant to the role that they were involved in, than this would be discriminatory.

Statutory right to request flexible working

All employees, not only parents and carers, have a yearly statutory right to request flexible working arrangements, provided that they have been with the same employer for at least 26 weeks. Their employer must act in accordance with the ACAS Statutory Code of Practice (<http://www.acas.org.uk/index.aspx?articleid=1616>). This means they may only reject an application based on one of eight possible reasons: including a suspected decline in quality of work, or a lack



of work available at the time requested.

Outside of the statutory request an employee may ask to work flexibly at anytime, and as many times as they wish.

However in these instances an employer can handle these requests anyway they think best and accept/reject a proposal for any (non-discriminatory) reason whatsoever.

Right to reasonable adjustments

All disabled employees are entitled to reasonable adjustments and accommodations within the workplace and their working patterns, to ensure that they are not seriously disadvantaged in their roles.

Disabled people are those who are recognised as having a 'substantial' and 'long term' physical or mental impairment, which affects their ability to continue in normal daily activities.

Older workers who may need such adjustments can be accommodated in the workforce in many different ways, discussed within the 'Designing Work for Older Workers' and 'Flexible Working' sections of this toolkit.

.....

Myth The legal restrictions on older workers are so onerous as to make them an inconvenience to hire

Fact All workers must be treated in a manner free from discrimination, and with reasonable adjustments made for disabled and impaired employees where possible. Older workers do not require special treatment, only fair and equal treatment under the law

Useful Links

<https://www.gov.uk/equality-act-2010-guidance> / <https://www.gov.uk/discrimination-your-rights/types-of-discrimination> - Guidance relating to the 2010 Equality Act and the nine characteristics protected within

<http://www.equalityhumanrights.com/your-rights/equal-rights/age/when-age-discrimination-lawful> A breakdown of when age discrimination may be lawful

<http://www.acas.org.uk/index.aspx?articleid=1841> – The key points relating to age discrimination

<http://www.cipd.co.uk/hr-resources/factsheets/age-employment.aspx> - An



overview of age discrimination, including the different forms in which it may occur

<http://www.hse.gov.uk/vulnerable-workers/older-workers.htm> - The impact of the law on health and safety arrangements for older workers

<http://www.acas.org.uk/index.aspx?articleid=1616> - ACAS Statutory Code of Practice for flexible working arrangements



13. Developing a Strategy for Older Workers

To Do

- Recognise the need to develop an organisational strategy relating specifically to older workers
- Identify how this strategy will be developed, and how it can be implemented most successfully throughout the business
- Aim to be proactive, making the most of an ageing workforce and the benefits to be realised

Why

Proactively managing your ageing workforce is necessary at a minimum to stay on the right side of the law

Actively taking an interest in the concerns of older workers can ensure that your business benefits from the a wider pool of labour and increases retention and productivity amongst its staff

How

Consider the following factors when deciding the appropriate strategy for better managing older workers within your business

Where can you build on the success of existing policies?

What actions can you take to generate enthusiasm and support from your staff?

Who do you need to bring on board in order to be successful?

What resources are you prepared to commit to make this agenda successful?

It may be that the needs of, and opportunities for, older workers within your business are best accommodated in one of the following strategies.



Focus	Business Strategy Aiming to...
Older Age Only	Maintain a high profile on older workers. This includes measures to support them in the workforce, through reasonable adjustments where required and protection from discrimination. It also includes developing a business plan that acknowledges and capitalises on the increase in older workers, such as by ensuring that they are properly retained, retrained and recruited
Age Diversity	Improve support for underrepresented age-groups, whether they are young, old or anywhere in-between. This recognises that people of different ages can all contribute to the success of a business, but also that employers may take active measures to prevent unfair discrimination against any age group
Broader Diversity	Promote better representation and management of issues concerning all minority groups. This touches upon each of the protected characteristics, so that organisational management is not only considerate of age, but also of race, sexuality, disability, etc.
Flexible workplaces/ Accommodations	Provide different measures of support throughout the workplace based on what each individual needs to thrive. This could focus upon changes in the working conditions, hours, or physical accommodations, which are available to all staff
Responsive management	Manage according to a continuously responsive approach; aiming to identify the issues facing the workforce now and in the immediate future, whilst acting upon them as and before they develop





Legal There is no legal requirement for employers to adopt an official policy on older workers. However, proactive and innovative practice that eradicates unfair or discriminatory treatment, could bring real business benefits and act as a highly effective means of maintaining a respected reputation as an employer

Myth Identifying a policy on managing older workers within the overall business strategy is unnecessary and a waste of time

Fact Older workers are becoming an ever larger proportion of the available workforce. Developing policy to help them in work, not only now but over the long-term, makes good business sense

Useful Links

<https://www.gov.uk/government/collections/age-positive> - A collection of many of the Government's publications relating to the Age Positive initiative

<http://www.cipd.co.uk/hr-resources/survey-reports/managing-age-diverse-workforce-views.aspx> - A CIPD guide to managing an age diverse workforce

<http://www.acas.org.uk/media/pdf/e/4/Age-and-the-workplace-guide.pdf> - An ACAS guide to incorporating matters of age into workplace management



14. Knowledge Transfer

To Do

- Understand the different types of knowledge which must be passed on in your organisation
- Identify which employees possess knowledge which is not available elsewhere
- Focus upon staff that have been with the business for considerable periods of time
- Develop procedures of knowledge transfer, including mentoring programs

What

Knowledge transfer is the passing of knowledge, expertise and sector awareness between employees. This is often knowledge imparted by older employees who have accumulated intellectual capital and identified smarter ways of working in your business.

Types of Knowledge

Practical knowledge is that which is required to carry out a role to the standards expected. It is knowledge gained from an understanding of common and best practice, and using individual attributes to implement these

Organisational/process knowledge relates to the processes which need to occur within an organisation in order to complete tasks. It relates to people, as well as being contextual

Network knowledge is an understanding of how best to work with specific individuals and teams over the course of tasks and projects

Why

When older workers are leaving they may take specialist unwritten



knowledge out of the workplace

Knowledge transfers can demonstrate to older workers that their contributions are still valued

If knowledge is not successfully passed between employees, business may be less productive, innovative and efficient, and new staff members will begin at a comparative disadvantage

- Clients and customers will expect staff to have retained the core knowledge and skills previously demonstrated by the business

Successful knowledge transfer can help new employees in the business assimilate, potentially reducing training costs and employee turnover

How

Identify

Who is leaving your business, the type of knowledge they have, and the type of knowledge which you are aiming to transfer

What information is duplicated across other sources, and what is held in a single place

Communicate

Take steps to ensure that older workers engaged in knowledge transfers are comfortable and confident whilst participating

Decide what mix of formal and informal mechanisms of knowledge transfer to use

Formal systems involve exchanging information in a planned and systematic manner. This can be written information, or formalised networks of personal support

Informal knowledge transfer often occurs through on-the-job learning, as a new entrant learns from a more experienced worker about the specificities of work

Methods of knowledge transfer

Mentoring is a well-known example of knowledge transfer in the working world. It is when a less experienced colleague is able to discuss matters of concern and interest with a more experienced mentor.



Older workers are more likely to be mentors as they have had more time within the workplace to build up experience, skills and insight to pass on.

To develop successful mentorships;

Ensure that both parties are keen to be involved

Ensure that the more experienced worker has valid and relevant knowledge to pass on

Allow appropriate time and means of contact for both parties

Consider promoting a standardised format, or set of guidelines, to facilitate discussion

Other types of effective knowledge transfer include

Working in parallel; a more experienced employee and their less experienced counterpart work alongside each other on the same tasks

Phased transition; employees are ‘working in parallel’ in order to facilitate a handover of the job role, from the more to the less experienced employee

Documentation; more experienced employees write down tips and relevant guidance



Myth ‘Knowledge transfer is not relevant to my business. All my new staff are educated and trained in the same manner as existing staff members’

Fact Knowledge transfer is not about ensuring that staff all have the same level of qualifications and training. Instead, it is about making sure that contextual, organisational and cultural knowledge not captured within these processes, is still passed on



15. Performance Management

To Do

- Understand what knowledge, skills and behaviours are required for different jobs; be specific in terms of outcomes required and areas of development
- Develop mechanisms and procedures to assess the competency and skills of all staff, regardless of age and potentially using the planning -> supporting -> reviewing framework
- Hold regular discussions with employees regarding all matters of working life and development, not only retirement options
- Consider the benefits of promoting Mid-life Career Review options.
- Where appropriate, do not wait for scheduled meetings - act on issues as they arise
- Monitor disciplinary and capability cases by age to identify trends or patterns in your workforce

What

Performance management comprises the active steps taken by managers to support employees, and improve the performance of individual staff members within the organisation

Why

Employers can no longer rely on the default retirement age as a proxy for addressing poor performance in older employees

Instead, all staff are entitled to be managed well and provided with opportunities for continued development in their role

- There is the opportunity to catalogue skill development and improve upon areas of poor performance

Effective performance management can increase the efficiency and productivity of the organisation



Holding regular discussions allows issues to be aired by both sides, and allows a space so that any difficult issues can be addressed in a timely and constructive way

How

Performance management can be viewed as a continuous 3-part process:

Planning -> Supporting and Managing -> Reviewing

Planning

Identify the employee's objectives within their role

Make note of the competencies the employee will be expected to demonstrate

Managers should ensure that they appropriately prepare for each meeting

- Bring completed appraisal forms from previous review exercises, noting where there is room for improvement
- Work in tandem with the employee to identify the relevant evidence and methodology for assessing each competency

Individuals also have a responsibility to prepare adequately

- Complete appraisal forms from previous review exercises and consider how well their performance compares with past targets set

Supporting and Managing

Performance management should be seen as an ongoing process throughout the year

Management and employees should meet regularly, to discuss whether decisions taken within the formal review process are being acted upon

Managers must provide the support needed to act upon recommendations made

- This could mean more training, fewer responsibilities in certain areas, or more oversight

Employees should communicate when they are facing difficulties in the workplace and when they are unable to meet an objective

Reviewing

Managers provide feedback to their employees based on an assessment of



their work against their objectives

Both discuss current performance, ambitions over the long term, and challenges faced

Employees should be ready to discuss the areas in which they have met their objectives, and the reasons for why they may not have met others

Mid-life Career Review

A Mid-life Career Review is an opportunity for people who are in their late 40s/ early 50s to take stock, review their options and **plan for the future**. The Review process aims to help people to manage their careers, find further relevant information, develop an action plan and address the life issues they face.

The Review process is currently being trialled by NIACE (<http://www.niace.org.uk/current-work/mid-life-career-review>) in a project looking to develop and test different models

Dealing with underperforming staff

Continued management of underperforming staff is possible within the planning -> supporting -> reviewing framework

Competencies which are not met should be identified, and methods of improvement should be considered

It is often helpful to have informal discussions on a regular basis and offer support to the employee, so that they can better meet their objectives

If improvement does not occur following this process, then there may be a need for formal mechanisms of assessment and improvement

Redundancy

Do not target older workers

- It is **illegal**: equality legislation means that it is illegal to single out a particular age group for retirement and/or redundancy
- It is **inefficient**: older workers can be as productive as their younger colleagues. They offer experience and skills which are specialised, have developed over time and are expected by clients

Use relevant competency/ skill criteria to assess members of staff, ensuring that each is treated fairly and judged according to the same



competencies

Further develop performance management mechanisms, to ensure that concerns and poor performance are identified and tackled earlier

A proactive approach to performance management is required as underperforming staff can no longer be simply left in their roles in anticipation of a default retirement age.

However, performance management should not be seen as only a means of critique and discipline. Instead it should be **considered an opportunity**; to identify areas of promise and challenge, and develop them further.



Legal In most fields of work there is no legal requirement to carry out performance reviews. However, a review system can help you to identify problems in the workplace before they develop further, and offer appropriate support

Myth Performance management is embarrassing for older workers, especially those who have been in post for a long time

Fact How employees view performance management depends on the efficiency and efficacy with which it is undertaken. Comprehensive performance management which builds on successes and looks to address challenges within the workplace, is often appreciated

Useful Links

<http://www.acas.org.uk/index.aspx?articleid=2927> – ACAS booklet on how to manage performance

<http://www.cipd.co.uk/hr-resources/factsheets/performance-management-overview.aspx> - An overview of performance management



Research Cited

- (1) Department for Work and Pensions, 'Attitudes of the Over 50s to Fuller Working Lives'
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 - (3) Munnej and Wu, 'Will delayed retirement by baby boomers lead to higher unemployment among younger workers'
 - (4) Health and Safety Laboratory, 'An update of the literature on age and employment'
 - (5) Health and Safety Laboratory, 'An update of the literature on age and employment'
 - (6) Farrow and Reynolds, Post-retirement age workers and health and safety
 - (7) BITC, Centre for Mental Health, 'Managing Presenteeism: a discussion paper'
 - (8) NHS Working Longer Group, 'Preliminary findings and recommendations report for the Health Departments'
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