



ASP.A

Activating Senior Potential in Ageing Europe

D.4.2. National report: UNITED KINGDOM

Report on organisational case studies

Confidential



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PART ONE: NATIONAL SUMMARY REPORT UNITED KINGDOM

I. INTRODUCTION

This report documents the results of the UK case studies of age management in labour organisations, which were undertaken as part of WP4 of the ASPA project.

It summarises the UK case study selection approach data (section 1) and presents ten UK case studies (section 2).

II. UK DATA COLLECTION

The research in the UK has followed the broad format which was set out in the original WP4 Guidelines (see Annex, Deliverable 4.3).

Sources of potential participating organisations

A detailed search was undertaken of previous relevant European databases, such as those published by the European Foundation¹ and the AEIGP (Ageing and Employment: Identification of Good Practice) study, together with a scrutiny of material from the UK's Employers Forum on Age (EFA), The Age and Employment Network (TAEN), case studies gathered as part of the former *Age Positive* campaign and other UK sources, such as HR Review or CIPD/CMI research publications, and those willing to be contacted following the UK ASPA Survey. Reference was also made to the *Sunday Times* 100 'Best Companies to Work For'. These sources revealed a relatively modest number of organisations which could be said to be, or likely to be, addressing age-related issues in a direct, explicit way, other than schemes introducing flexible retirement or abolishing the default retirement age early on.

Even these sources sometimes proved to be misleading where the practice turned out to be weaker than at first thought. In the case of the ASPA Survey, a significant number of organisations whose respondents were contacted on the basis of their confirmation that certain policies operated seemed to locate these within a benign and constructive general HR approach rather than being designated 'age management' policies. Some of these instances are noted in the case studies. It was often the case also that certain practices had developed within a company but they had not gained the status of being a formal 'policy' or 'scheme'. This is not necessarily a problem for the understanding of 'pathways of practice' but does make much more difficult the identification of companies with clear examples of sustained 'good practice'.

It was clear early on that the research could not and should not rely only on high profile cases or recognised 'champions' of initiatives for older workers, which might well have

¹ <http://www.eurofound.europa.eu/areas/populationandsociety/ageingworkforce.htm>

already been over-researched. While it was clear that all partners would need to over-recruit in order to secure case studies which would fit broadly with the WP4 template in terms of features such as size, public/private and sector, the degree of over-recruitment needed was found to be significantly greater than expected.

Arranging, even preliminary access took longer than envisaged and there were also several instances where, having shown initial interest and commitment, the organisation later withdrew because of the time involved or the need to agree to a site visit. Some withdrawals took place at very late stages in the process.

Recognition of the Term/Concept of 'Age Management'

'Age Management' is not a term readily understood in the UK (see TAEN, 2007, and CIPD/CMI, 2010). This acted as a barrier in gaining access to organisations as even HR professionals needed extra information or reassurance about exactly what the research was about or would entail.

It seems that part of the reason for this is that the equal opportunities and (more recently) diversity frameworks are much more clearly understood and developed and that the legal framework of anti-discrimination takes in many elements alongside age. Some HR managers are, moreover, uneasy about 'age management' appearing to carry a message of privileging one group over others.

The Financial System Crisis and the UK 2010 General Election

The impact of the crises in the UK and USA financial systems and their wider ramifications in Europe meant that many of the case study sites approached were facing great business uncertainties, if not already experiencing a major downturn. The UK's general election in May 2010 which resulted in a Conservative-Liberal Democrat government and the debate about the stringency of cuts needed in public spending added to the uncertainty and this then gave way to recognition of just how deep the Government was planning to go.

Among the major cuts are those particularly relating to mainstream higher and further education, the special work and training schemes, and public sector pensions.

The Outcome for Fieldwork

By December 2009 the UK team had identified about 25 organisations from the sources mentioned above. These included target companies which met the required criteria, and possible alternatives as substitutes if the preferred companies proved inaccessible. In several cases, initial interviews with a key person took place, and seemed initially promising but some of these proved not sufficiently active in terms of age management or the organisation withdrew for a variety of reasons. The team had to over-invest research and interview time much more than had been envisaged.

From the spring of 2010 onwards when the main data collection process began, many of the organisations we contacted were acutely aware that their environment was changing greatly

but were still often unsure about what that meant. The reason they gave for avoiding participation was sometimes that of pressure on staff time. Others may have been concerned about how the organisation would be able to cope with the coming financial stringencies and therefore unwilling to accommodate any intrusion and engage with the research process at this time.

In these circumstances, it was necessary to keep revising the potential case study list. In fact, only two of the 25 companies on the December 2009 list feature in the final portfolio of completed case studies.

While every attempt has been made to include trade union or works council representatives, where applicable, with researchers following up a named contact or the HR representative passing on a (written) request, this has not been met with success.

An overview of the selected 10 case studies and their dimension of good practice is provided in Table 1 below. Table 2 presents an overview of the case studies according to the selection criteria.

References

- The Age and Employment Network (TAEN) (2007) *Managing the Ageing Workforce: an introductory guide to age management for HR professionals*. Available at www.taen.org.uk
- CIPD/CMI (2010) *Managing an ageing workforce: how employers are adapting to an older labour market*. <http://www.cipd.co.uk/hr-resources/survey-reports/managing-an-ageing-workforce-employers-are-adapting-to-an-older-labour-market.aspx>

PART TWO: CASE STUDY SUMMARY TABLE

Table 1: Overview of UK case studies

UNITED KINGDOM						
Alias	Name of organisation	Legal form (public /private / non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice*	Longitudinal case (yes, no, unknown) and duration of measure
UK01 Ballet	Birmingham Royal Ballet	Non-profit (with 68% public funds)	Culture (R90)	187	3, 4, 7, 9	Yes, but not documented before Health protection and promotion focused in purpose-built medical facility opened in 2001. MA in Applied Dance Studies began 1997. Health promotion and injury prevention programmes will continue. Successful higher degree course should be sustained although major changes in Higher Education currently taking place make the environment unpredictable.
UK02 Recruitment	Recruitment agency (anonymous)	Private	Employment Activities (N78)	230	Comprehensive approach (10)	Yes (EUF good practice case study published in 2005 and classed as comprehensive and still viewed as comprehensive) Awareness raising campaign launched in 2005 - in the process of being re-launched in 2010. Both campaigns preceded changes in legislation
UK03 Care	Care Home (anonymous)	public	Residential Care (Q87)	67	Comprehensive approach	Yes, but not documented before Measures have been in place for some time but no specific year indicated when measures were introduced (likely to be more than three years ago)

UK04 Training	Vocational Training Charitable Trust (VTCT)	Non-profit	Education/Awarding body (P85)	98	Training and development (3, 4)	Yes, but not documented before Major restructuring in 2008 led to developing HR practice and two training opportunities in 2009-2010. NVQ Level 2 Customer Service CMI Level 5 Diploma in Management Training Aim is to continue up-skilling the workforce through appropriate training.
UK05 School	St. Edward's School	Private	Education (P85)	410	Training and development (3), 9	No NVQ training over 18 months in 2009-2010. Changing HR framework over past 3 years. Intention to continue specific NVQ training; however this relates to cost, given current national cutbacks.
UK06 Telecom	Telecommunications company (anonymous)	Private	Telecommunications (J61)	80,000 (UK)	Comprehensive approach (10) (but note in particular 6,7,8 and 9)	Yes (EUF published in 2005 and classed as flexible working practice in 2005 and as comprehensive now) International Innovative Employer award in 3 consecutive years since the award was first launched in 2007 In early 2001 BT introduced its flexible retirement, since 2005 abolition of fixed retirement age WorkFit programme launched in 2005 Carers' network for people with caring responsibilities since 2010
UK07 Call Centre	Call centre (anonymous)	private	Office administrative, office support a. other business support activities (N82) & Insurance (K65)	900	Comprehensive (10) (but note in particular 1, 7 and 9) (and also 4 and 6)	Yes (Age positive publications, 2008/09 AARP International Innovative Employer award) Sources: various snippets in DWP (Department for Work and Pension) publication issued in 2007 but policies/practices will have been in place for a while by then.
UK08 Retail	Lingerie company	private	Retail trade (G47)	726	1, 3, 4, 6, 8	Yes, but not documented before

	(anonymous)					Since its foundation in 1995, company has established strong employee satisfaction and person- centred HR which benefits people of all ages. Commitment to different styles of flexible working will be sustained.
UK09 Housing	Calico	Non-profit	Real estate activities (L68)	336	2, 3, 4, 6, 7	Yes, but not documented before Established 2000 Imported at that time many elements of local authority HR practice and has further developed this. Likely to retain case-by-case approach for all employees.
UK10 Council	Falkirk Council	Public	Local Authority (O84)	8,100	10 (but note, in particular, 6,7 and 9)	Yes, but not documented before Flexible retirement since 2005/06 Flexible working policy since 2001 Stepping up general health promotion since 2001

Legend: EUF: European Foundation for the Improvement of Living and Working Conditions

* Age management approaches:

1. Job recruitment
2. Awareness raising, changing attitudes and diversity
3. Training, lifelong learning and knowledge transfer
4. Career development and mobility management
5. remuneration, i.e. consideration of bonus and salary systems
6. Flexible working practices (including working-time arrangements over the life-course and reconciliation of work and family life/care)
7. Health protection and promotion and workplace design
8. Redeployment and retention
9. Employment exit and the transition to retirement
10. Comprehensive approaches.

Table 2: Case studies according to selection criteria

Company size	Documented longitudinal cases			Additional cases (many with longstanding measures)			Total		
	Public	Private	Sub total	Public	Private	Sub total	Public	Private	Total
< 250		1	1	1	2	3	1	3	4
250 < 500					2	2		2	2
500 >		2	2	1	1	2	1	3	4
Total			3			7	2	8	10

PART THREE: CASE STUDIES IN ORGANISATIONS

III. UK CASE STUDIES

Presented below are the ten UK case studies. While care has been taken to include examples from England, Wales and Scotland, in the end the Welsh candidates were not brought to fruition.

CASE 1: BIRMINGHAM ROYAL BALLET

Type of measure: Training; Career development and mobility management; Health protection and promotion and workplace design; Employment exit and transition to retirement

Executive summary

Birmingham Royal Ballet (BRB) is the UK's second largest ballet company. It has existed since 1931, moving to Birmingham in 1990. Its city-centre premises adjoin the Hippodrome Theatre though the Company often tours in the UK and abroad. It performs the classical repertoire and creates new full-length ballets, often commissioning new music.

In 2008-09 68% of income came from two sources: Arts Council England and Birmingham City Council. BRB contributes to three pension schemes, employing 187 people in 2010, plus occasional casual staff. Three unions represent employees; relations were said to be open and productive.

The workforce is overall very stable: steps were recently taken to address succession planning. BRB values professional development and accreditation, supporting staff on training courses. Dancers and musicians have full-time permanent contracts, though dancers tend to stop performing around the age of 35. BRB contributes to the national Dancers' Career Development Fund which helps dancers retrain for post-performance careers. Two distinctive features are the Jerwood Centre for the Prevention and Treatment of Dance Injuries and the Master's degree in Applied Dance Studies at Birmingham University.

The Jerwood treats dancers as elite athletes offering screening, exercise programmes etc. Specialist staff have recorded decreasing numbers of injuries. They help dancers regain and maintain performance standards. The 'Dancer's MA' was the first long-term initiative to create a customized programme for a company which enables dancers to perform and tour, while studying.

1. Organisational background

The Company: Birmingham Royal Ballet (BRB) is a registered charity and a company limited by guarantee. The UK's second largest ballet company, it is internationally known, having existed in different forms since 1931. As Sadler's Wells Ballet it gained its Royal Charter 50 years ago. In 1990, it moved to Birmingham, becoming Birmingham Royal Ballet. Its premises adjoining the Hippodrome Theatre house studios, offices, meeting rooms and a health centre with scenery workshops at another site. Elmhurst, its associated professional dance school also moved to Birmingham. The Company aims to inspire audiences with work that is entertaining, relevant, exciting and technically excellent. It is committed to inclusion and access. It creates new full length ballets, commissions new music and performs the classical repertoire (Birmingham Royal Ballet Annual Report 2008-09 p. 4).

BRB is a Regularly Funded Organisation of Arts Council England (receiving £7,987,147 in 2008-09). It has strong financial support from Birmingham City Council (£1,111,800 in 2008-09). These two sources provided 68% of total income in that year. Commercial activities (eg sale of tickets, fees from music and education projects) amounted to £3,254,308. Donations (trusts, foundations, legacies etc) produced £318,428 (Annual Report 2008-09 pp 27-30). Total income was £13,399,444. Of this, wages and salaries (including social security and pension costs) came to £8,042,618 for the 168 people then employed by the company.

The Company contributes to three pension schemes: The Dancers' Pension Scheme (£88,386 in 2008-09), the Birmingham Royal Ballet Pension Scheme (£95,359) and the Musicians' Union Pension Scheme (£61,729).

The workforce: In early 2010 the Company employed 187 people (interview estimate, see Table 1). There are normally about 60 dancers and 40 musicians in the Royal Ballet Sinfonia, BRB's orchestra. Other employees are technical and administrative staff. Front of house and cleaning staff are employed by the Hippodrome Theatre, not by BRB.

Additional technicians, actors (extras) and others are engaged on a casual basis for particular productions: this could be 12-20 technicians. Some live in another city and are employed only when Birmingham Royal Ballet tours there; others choose to work for only 20-30 weeks of the year. Temporary staff include assistant stage managers (or unpaid student placements from Elmhurst Ballet School). Numbers fluctuate with each production; sometimes additional freelance musicians are engaged.

Dancers and musicians are on full-time permanent contracts (but 35 weeks per year for musicians). It is unusual in the UK to find such job security for performers, who often work on a freelance basis and/or short term or seasonal contracts.

There has been little change in the staffing pattern recently. The economic downfall had not yet hit the Company as sharply as it has affected many others. (Generally, theatres and cinemas have been surviving well, with some increasing box office takings.) However, this is currently the third year of BRB's current government funding cycle. This will shortly be reviewed under the new UK coalition government.

*

Table 1 shows the age distribution of employees in 2010. There was a gender balance (90 women and 97 men). 123 worked full-time and 64 part-time. Monitoring figures show employees' ethnic origin in 2010 as: Asian: 2; Black Caribbean: 3; Japanese: 3; Chinese: 2; Mixed race: 2; White British: 151; White other: 24. However, ethnicity is not congruent with country of origin. BRB recruits dancers from an ***international pool of the highest talent and here the UK Government's recent tightening of visa controls became an issue.

Employees hold diverse vocational, academic and professional qualifications as appropriate to their post. However, the professional dancer generally 'graduates' from a dance school in the UK or elsewhere without a formal qualification. We were told that the ASPA distinction between 'blue collar' and 'white collar' jobs was not one with which the company would feel comfortable.

Table 1: Age Analysis by Department

Department	≤ 25	26-35	36-40	41-45	46-50	51-55	56-60	61-65	>65	Total
Ballet Press	1	4	1	3	1	1	1	1	0	13
Ballet Staff	0	1	1	0	3	1	3	3	2	*14
Dancers	29	27	1	1	0	0	0	0	0	58
Department for Learning	0	3	1	1	0	0	0	0	0	5
Development	0	0	2	0	1	1	0	0	0	4
Extras	0	3	1	2	2	2	0	3	4	17
FJF	3	0	0	0	0	0	0	0	0	3
Management	0	3	3	3	2	4	2	1	0	18
Medics	0	1	3	1	0	1	1	0	0	7
Music Staff	0	0	1	0	3	2	0	0	0	6
Orchestra	0	7	8	11	4	9	3	2	0	44
Technical Casuals	1	0	0	0	0	0	0	0	0	1
Technical Staff	1	9	1	3	6	2	1	0	0	23
Wardrobe	2	5	2	1	1	0	1	1	0	13

*This figure includes 7 chaperones employed for a production with children.

Source: Birmingham Royal Ballet Human Resources Department 23-02-10.

Organisational challenges include:

- addressing requests for raised wages and salaries in straitened financial times
- generating more diverse sources of income – via new development posts
- externally, the Government's tighter rules regarding visas seemed a probable threat to recruitment. However BRB was consulted in advance and successfully argued that professional ballet dancers are a 'shortage occupation'. The pool of talent is international but dancers do not normally have sufficient HE qualifications nor an income adequate to gain the points required of most visa applicants. This 'shortage occupation' agreement means that dancers from outside the EU are not obliged to meet the standard points qualifications for a visa.

- internally, succession planning became an issue in some technical areas where expertise or craft skills (eg wig making or wardrobe) are essential for the company but these may lie with one key employee. Low staff turnover prioritises the replacement of such specialist skills when long-standing staff approach retirement. BRB's historically flat structure also means that the departure of one of its senior managers could be a major disruption. Opportunities have been introduced for employees below director level to gain wider experience. There is now a deputy role in some departments.

Social dialogue: Three unions represent employees:

- Equity (which represents performers and other creative workers from across the entertainment, cultural and creative industries)
- The Musicians' Union, and
- BECTU (the Broadcasting, Entertainment, Cinematograph and Theatre Union).

Negotiations centre on annual salary agreements and BRB's HR Director thought that relations were generally productive rather than negative. BECTU represents about 20 members at BRB, mostly working in technical departments. The BECTU regional official saw BRB as being very ready to discuss in advance any planned changes. There is a staff consultative group for people who do not belong to a union.

The pay framework was reviewed over a period of almost two years. A pre-existing complicated pay structure with many differential payment elements (eg when on tour) made it hard for employees to be sure of their earnings. The new pay structure clarified salaries, making it easier for people to provide information on their earnings when seeking a loan or a mortgage. Company representatives had been willing to sit down and 'take as long as it takes' to reach an agreed outcome. Everyone was involved in the consultation process. To assure staff that they were not agreeing terms which might prove to be disadvantageous, reviews were scheduled for after implementation. As a result of these some further changes were made. Individual cases had sometimes emerged: we gained the impression that the company as well as the unions makes efforts to support employees in such situations.

2. Age management approach

Excluding dancers, the age profile shows a quite even spread across all age groups. Including dancers means that those under the age of 35 dominate.

Professional ballet dancers present an example of age management which challenges stereotypes. Those who perform internationally have a fierce training regime from the earliest years. This prevents commitment to education and training outside what is required for a performance career, which is itself physically demanding with constant touring commitments. In this company the 'nominal' age for retirement from a performing career is about 35. Typical routes followed could be choreography, work in the community or focusing on teaching dance. Many former dancers work freelance.

In early 2010, Birmingham Royal Ballet was addressing some issues concerning succession planning. 51 staff had 11 or more years service. Of these, 20 people had 25 or more years of service. The longevity of some careers should not surprise. Similar features were noted in a Demos 2010 report which comments on institutional ageing in The Royal Shakespeare Company where an unusually large number of staff had long tenure, some with over 30 years' service.

People in administrative posts have qualifications and skills which are more readily transferable, but they too gain great job satisfaction from working in an arts organisation with creative people for a company of international repute. In these departments as well this is a stable workforce. However, in this case study we concentrate on two specific measures, each unique in addressing health needs and people's professional development at different stages of their working lives.

3. Current practice and how it has evolved

Employees' annual appraisal aims to be developmental, pointing to continuing professional development needs. The HR Director's budget can part-fund these or provide appropriate support. Dancers increasingly take Open University (distance learning) modules in eg physiology/biology. These can fit around inflexible performance and touring schedules and accumulate towards a degree. Two Jerwood Centre staff are studying for Masters' degrees; its Director is doing a doctorate. BRB's Director of Finance completed an MA in Cultural and Creative Policy Studies. The Director for Learning and the Head of Creative Learning both completed the MA in Applied Dance Studies. The company is developing the Accreditation of Prior Learning (APL) to support the career development of technical staff. Professional development and accreditation is valued at many levels and BRB was seeking to renew its status as an Investors in People organisation.

Retraining through the national Dancers' Career Development (DCD) is central to BRB's ability to support employees in less academic areas. This charity was founded in 1974. Nine major dance companies contribute through a levy system to the DCD which provides career support to professional dancers in the UK. In 2008-09 BRB's contribution (a percentage of dancers' basic salaries) was £89,571 (BRB Annual Report 2008-09).

This support could be career, emotional or academic counselling, or referrals to welfare/ other support services. Retraining grants provide course and training fees, equipment, maintenance, travel and child care costs. There are business start up grants. Dancers can access educational resources, networking and international collaboration at any stage of a professional career, not only prior to retirement. (See Appendix chart and website <http://www.thedcd.org.uk>.)

Many dancers move into education or outreach work. One dancer took a year's sabbatical to do a body conditioning course to become a personal trainer. She continued to dance afterwards, but is now trained for the time when she will no longer perform. Another is considering training allied to medicine or physiotherapy. In unrelated areas, a female dancer had trained as a pilot.

Programmes comparable with the DCD exist in Canada and the USA and in Europe through the Retraining Program for Dancers: Stichting Omscholingsregeling Dansers founded in 1986 in The Hague. In 1993 the International Organization for the Transition of Professional Dancers was established in Switzerland.

Two measures unique to BRB regarding age management are: the Jerwood Centre for the Prevention of Injuries and the Masters' Degree in Applied Dance Studies. In practice, the Company focuses on age management concerns at an early stage in employees' professional lives.

The Jerwood Centre: 'We keep them dancing longer'

The Jerwood Centre is a £250,000 purpose-built medical facility which helps sustain a performer's career by preventing injury and addressing health issues. An internal review indentified the need to look after dancers as if they were elite athletes and to address their occupational needs. Creating the centre and designing the facilities involved BRB's previous Chief Executive and the then Clinical Director of the Jerwood Centre.

Any employee can use the equipment, though 90% are dancers and the Centre was created to support them. The in-house specialist team comprises: the clinical director, two company physiotherapists, two massage therapists, a body conditioning instructor and an administrator.

The Jerwood's enviable modern premises adjoining the Hippodrome Theatre include a spacious exercise hall with the latest diagnosis and fitness equipment, a hydrotherapy pool, and offices. Interview rooms allow private consultations with staff. The Clinical Director commented that the Centre provided more staff, facilities and resources than he had previously had as Head of Medical Services at a premier Rugby club.

BRB spends about £6,000 annually on each dancer's health care, covering staff costs, facilities, consumables, insurance etc. Staff from a private medical centre (practice nurses, the lead physician and general practitioner) visit the Jerwood weekly. When necessary dancers are 'fast-tracked' for a diagnosis. A separate contract with a private counselling service addresses mental health concerns.

Dancers are well served in avoiding injuries or recovering. This improves the length of their working career as international performers: 'We keep them dancing longer' (Clinical Director). Monitoring injuries, he recorded reductions from 390 injuries in Year 1 to 190 in Year 2 and 160 in Year 3. Significant and moderate injuries reduced so most injuries are now 'transient': they respond to treatment within seven days.

Injury prevention informed the design of a new stage which would meet scenery requirements and performance needs but would also reduce the possibility of injury. We heard of dancers' warm appreciation of the new stage.

Medical staff assess any special demands in a production and prepare a regime which helps dancers prepare. The diverse and challenging repertoire means that, as the Clinical Director observed, ballet is not like playing a football match which might be much the same each time. Instead, 'It's the difference between running a marathon one week and a sprint the next'.

The Jerwood Centre participates in research with several HE institutions. BRB is formally committed to working with these partners to create a National Institute of Dance Medical Science as part of the legacy of the 2012 Olympic Games. One current research programme investigates osteoporosis. Dancers contribute to this work knowing that it will benefit others, perhaps themselves too, later in life.

Some external clients, mostly elite sportsmen and women, book sessions with Jerwood Centre staff. This modest income stream supplements funds for equipment.

Relationships with the rest of the company are carefully balanced. The Clinical Director does not sit on BRB's Senior Management Team, and had no regrets about this: '*I have to treat them as patients but I have a responsibility to the rest of the company, but actually they've got to be treated as patients first*'. However he also voiced a dilemma:

If I treat them too much as patients and not as dancers, they won't have a career. If I treat them too much as dancers and not as patients, they'll have a very short career. So I've got to pitch it somewhere between the two.

He felt fortunate that he had never experienced pressure from the Artistic Director about a dancer's return to the stage. He commonly proposes two timelines: 'We can get them *ready* by this, or we can get them *right* by this'. The Centre's relatively independent position and medical confidentiality mean that no details are shared with management unless a dancer explicitly requests this. The key to managing recovery was communication with dancers:

It's not about pain. I'm afraid these guys go through pain all the time. What it is, is: Is it going to be to their long-term detriment? Is it going to affect them later on in life? I'd like them to leave here by their own choice rather than by their body's choice.

To avoid later complications arising from what initially seems a minor injury, dancers recognise that such decisions are made in their own interests. Yet there remains an inevitable tension between that and the wish to perform even while injured because one's career depends on visibility.

Similar concerns underlie the Centre's engagement with partners in research on bone density. It is hoped that when today's dancers are aged 60, they will thank the Centre for the research currently taking place when they're under 35 years of age.

Through the British Olympic Association Athletes Medical Scheme, the right consultants are accessed when needed. The model used by sports organisations is being examined to see what ballet can learn from this. Statistically, there is no difference between the pattern of injuries sustained by male and female dancers, apart from some cases of female athlete triad.

Every dancer is offered screening sessions three or four times annually. On tour, one or two physiotherapists and a masseur travel with the company. Any injured dancer returns to Birmingham for treatment. Dance differs from sports like Rugby where there can be 'catastrophic' injuries. In ballet the stress is on standard of performance (not just participation), so the definition of injury centres on the ability to do all that a role requires 24 hours or more after an injury occurs. It is not enough to be able to do class or go on stage if the dancer cannot perform all that the role requires.

Towards the end of a dancer's performance career, discussion with the Artistic Director helps to shape decisions. Jerwood Centre staff provide a sounding board if there are physical issues.

All BRB employees benefit from general screening eg ergonomic audits and VDU assessment. Groups of employees with similar problems are offered hydrotherapy sessions led by Jerwood physiotherapists. Centre staff were in 2010 reviewing the work of the lighting group, who sometimes sit for long periods in cramped positions. A screening and action programme was being devised to help counter the pressures of their working environment.

The MA in Applied Dance Studies

The 'Dancers' MA' at the University of Birmingham looks towards career development beyond a performing career. Since 1997 it has produced 26 MA graduates whose fees were paid by the Company. It was described as a model of good practice in the national 'All Our Futures' Report (DFEE/DCMS 1997). This was the first long-term venture in the UK and beyond for a customized programme for a company to enable its dancers to continue their professional career schedules including touring whilst committing to academic study. It was hailed as 'a landmark in the development of dance education' (Bannerman, 2000, and Clarke, 1997 cited in Benn, 2003).

Dancers' touring and performance schedules do not align with academic schedules. This course is structured to take account of dancers' patterns of work, offering entry and exit flexibility, and intensive weekend study over two years.²

The course is tailor-made for people who had to give time in their teenage years to physical training rather than academic study. As adults, their professional commitments preclude attending regular courses. Approaching the end of their time as performers, they must capitalise on the special skills they already have in moving to a different career. Benn (2003, p.7) notes that these high risk lives can lead to 'feelings of exclusion, loss of sense of purpose and financial insecurity'. She documents how high level CPD at post-experience, postgraduate level can facilitate career changes, raise self-esteem and feelings of empowerment. The MA develops new academic skills linked to dancers' experience which will be useful in a new work environment or in 'side-stepping' within the dance sub-sector.

² http://www.education.bham.ac.uk/programmes/cpd/courses/applied_studies_in_dance

Benefits are analysed as those felt by the company, by the dancers, and by the wider education and dance /arts world (Benn, 2003, p.15).

A 2007 booklet records former students' views on how significant their tailor-made study was in preparing people for major career transitions. They describe understanding the place of dance in society, recognising the purpose and effect of work in community settings, gaining new transferable skills and confidence, achieving accreditation which appeals to future employers and clients. They gained research skills such as planning work, critical enquiry and analysis, writing and dissemination. Dissertation topics range cover applied psychology for professional ballet dancers, the physiology of dance, the choreographer's role, health issues among female ballet dancers, and more conceptual work placing dance against other artforms and exploring ballet through sociological, cultural or political perspectives. The MA impressed later employers but equally the process of practice-based postgraduate study instilled the confidence to seek posts which would previously have seemed beyond their reach.

Regarding age management, these people face the reality of having to change their pattern of employment at a relatively early stage in their working lives. Most continue working in the world of dance after their performing career ends. The MA, like other opportunities discussed, indicates a strong commitment by the company to supporting employees through such changes of direction.

4. Concluding reflections

Professional ballet dancers face career change decisions much earlier than most people. The pressures, as with many sports at an elite level, are inevitably age-related. It becomes harder to maintain an excellent performance standard at the level expected in the 21st Century. An MA related to one's practice and experience in an area which will open doors in the future is an opportunity which former dancers have used astutely.

Birmingham Royal Ballet's two very different initiatives show a sharp concern for the well being and professional development of dancers both physically and intellectually over the life cycle. This case study helps us to reconsider assumptions about the process of age management ahead of retirement.

Interviewees

Human Resources Director
Clinical Director of the Jerwood Centre
Regional Officer, BECTU

Other contacts:

Director for Learning
Head of Creative Learning.
Course Co-ordinator for the MA In Applied Dance Studies (University of Birmingham)

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www.brb.org.uk

References and web sites:

<http://www.bectu.org.uk>

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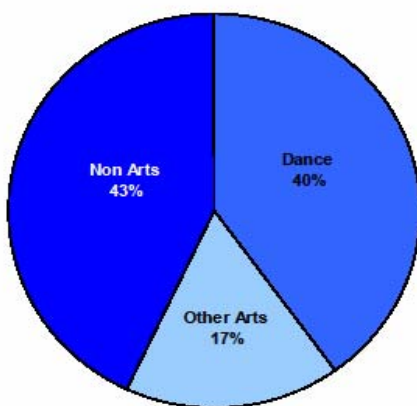
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Appendix chart



DCD helps dancers retrain both in dance and non dance careers

Company Dancers Career Choices Breakdown 1)



1) Total of 348 Company Dancers

Dance	Non Arts	
<ul style="list-style-type: none"> • Choreography • Choreology • Dance Teaching • Dancing • Notation 	<ul style="list-style-type: none"> • Accountancy • Advertising/Marketing • Alexander Technique • Alternative Therapy • Anthropology • Archaeology • Archive Work • Beauty • Business administration • Carpentry • Childcare/Social Work • Chiropody • Counselling • Disc Jockey • Electrician • Environment • Feng Shui • Fitness Instructor • Government • Gyrotonic • Hairdressing • Horticulture/Floristry • Hotel/Catering • IT • Journalism 	<ul style="list-style-type: none"> • Languages • Law • Life Coaching • Make up Artist • Martial Arts • Massage Therapy • Medicine • Nursing • Osteopathy • Picture Framing • Pilates • Pilot • Plumber • Public Relations • Sciences • Scuba Diving • Secretarial • Social Work • Stunt Man • Teaching (not dance) • Theology • Therapy (physical and non) • Tourism • Yoga • Tailoring
Other Arts		
<ul style="list-style-type: none"> • Acting/Mime/Theatre • Arts Mgt / Admin / Consultation • Casting • Costume • Crafts • Design • Directing • Fashion • Film/TV/Radio/Video • Fine Arts • Graphic Design • Interior Design • Multi-Media • Music/Sound Technology • Opera • Photography • Theatre/technical 		

CASE 2: UK02 - RECRUITMENT

Type of measure: Comprehensive

Executive summary

UK02 Recruitment is an expanding recruitment agency working across the public and the private sector. Founded in 1989, it currently employs around 230 people in its London Head Office and in five regional offices in England. In 2007, it has become part of a private equity group. The company, which has won a number of awards for its recruitment services, is currently working in a highly dynamic market environment due to the economic climate. Gauging the future potential of market segments is vital, and so is aligning the skills and expertise of its workforce. The percentage of older workers is currently low but may increase over the years as a number of well performing employees are approaching their 50s.

Treating each person as an individual and fitting their needs in with business needs is at the heart of human resources management, and this is clearly communicated to staff when they join. The company offers flexible working options and assesses individual needs or changing individual needs on a case by case basis locally by the line manager, while maintaining a strong performance culture. Diversity training for staff dealing with clients is mandatory and key to operating the business. The company provides health and wellbeing support. There is no set retirement age. The company has also been engaging in a number of age diversity in recruitment campaigns over the years, ahead of up-coming legislative changes.

Age management can be seen as comprehensive, although the term age management is not used within the company. The overall approach has remained unchanged compared to five years ago.

1. Organisational background

UK02 Recruitment is a provider of recruitment, training, consultancy and managed services. Founded 1989, its main business is the provision of recruitment services across public and private sectors, including areas such as social care, health care, charities, construction, engineering or administrative and clerical jobs. UK02 Recruitment operates across England from its Head Office in London and five other locations, one of which opened recently in response to increases in demand. In 2007, the company became part of a private equity group. Over the years UK02 Recruitment has won a number of awards for its recruitment services and for its age diversity in recruitment. Despite the recession, the turnover nearly doubled between 2007 and 2010, and currently stands at £300m.

Criteria	Parameter value
Size (no. of employees)	Medium (around 230)
Sector	Service, Private
Work council	Yes

The company continued to grow over the years and currently employs around 230 people, representing an increase of about a third compared to five years ago. Most of the staff work in the London office, with other locations employing around 15 people each. Around 50% of its workforce is male and 50% female. The workforce ranges from people in their 20s through to their 50s. While the percentage of 50 plus group is currently small, a number of people are approaching their 50s in the next couple of years. A small group, around 5%, works part-time, largely women returning from maternity leave.

Labour turnover among the sales focused recruitment workforce is “quite high”, though lower than in other recruitment agencies. Compared to other areas of work sales in general has higher labour turnover figures, which are currently affected by the dynamic nature of the market environment. Among operational staff working in support services, training, finance, marketing and human resources figures are “very low”.

The company did not experience any recruitment problems to date. Since UK02 Recruitment is seen as a good employer, the company may be one of several that job seekers may want to consider and approach. In recruitment services, motivation, attitudes and sales skills are key to successful applications rather than education levels in itself, whereas in the operational part relevant job specific qualifications are required.

Key challenges: During the recession demand for recruitment services across sectors and occupational groups was highly variable. In such a dynamic market environment multi-sector agencies need to constantly assess changes in demand and swiftly move from declining to growing market segments. This can mean moving from construction to social care and other public sector work, and this has huge implications for skills requirements. The company has adopted a two-pronged approach: (a) moving good performers working in a difficult market across and training them and (b) recruiting high performers with experience in the new growth market segment. With a number of recruitment agencies having gone out of business, there is a ready supply of successful and experienced recruitment consultants. As a result, the company has stopped its graduate training programme, as this is no longer cost-effective, but may run it again in the future.

The social dialogue: The works council, set up 15 years ago as the UK02 Recruitment Consultancy Group, consults staff on any major changes to the business or the company's policies. Most recently consultations included changes in relation to sick policy, maternity policy and minor restructure involving redundancies. The works council consists of representatives from all regional offices and meets when there is a need for a consultation.

Furthermore, both the Chairman and the Chief Executive regularly engage in conversations with staff when they visit regional offices.

2. Age management approach

UK02 Recruitment has human resources policies and practices in place which benefit the entire workforce, including older workers. This is underpinned by an equality and diversity policy and a separate age diversity policy. As an Age Positive Champion the company has

been promoting an age-diverse workforce, and has been a finalist in the Department for Work and Pension Age Positive Award in early 2000. Moreover, the company has introduced changes ahead of legislative requirements. The company offers flexible working options; assesses individual needs or changing individual needs on a case by case basis locally by the line manager while maintaining a strong performance culture; promotes age diversity among its clients by training its own staff and educating clients; promotes health and wellbeing; and does not have a retirement age. Age management can thus be seen as comprehensive, although the term age management is neither used within the company nor the recruitment business.

The then Chief Executive of UK02 Recruitment, and now Chairman, was instrumental in campaigning for age awareness and age diversity among clients since the 1990s. He argued that if the company has candidates who are over 50 or over 60 and want to work, it 'makes good business sense' for the company to help them to work. The company trained their staff on how to deal with clients and on focusing what candidates have to offer rather than describing them in terms of their age. Date of birth has been taken off curricula vitas before legal requirements were introduced. In addition UK02 Recruitment has published leaflets and articles and run client events – 1-1.5 hour sessions, mainly in London, informing clients about legislative changes and engaging them in a discussion. The company has been recognized for its work in this area and won the Age Positive Recruitment Excellence Award in 2006. Awareness campaigns are run ahead of legislative changes, and the company is currently in the process of embarking on another one.

Despite promoting an age diverse workforce UK02 Recruitment has few older workers over the age of 50. People don't choose to work in this business when they are older because it is very high pressure job, explains the Human Resources Manager. However, this may be about to change as some employees are approaching 50 and they are successful in their job. It was thought unlikely that they are leaving their jobs when they turn 50, and nor does the company want to lose them. The next ten years were thought to be an interesting new phase for the company. However, the Director of Human Resources would not expect there to be a problem, if in future there would be 20% older workers - some of whom may have caring responsibilities for adult family members – as key strategies are already in place. Managing capabilities applies to everyone regardless of age, and treating everyone as individual helps to support the individual, while balancing the needs of the individual and the business. In a company with a strong performance culture there are also opportunities to agree lower performance targets (on a temporary basis) but employees may not be too keen on that as competition is entrenched in the sector.

3. The original measure

In 2005, when the previous case study was undertaken³, UK02 Recruitment's approach to age management was classed as comprehensive, with policies and practices covering the entire employment cycle from recruitment to exiting/retirement. The company just relaunched its promotion of "age-related issues" and promoted an age diverse workforce ahead of legislative requirements at the time. It already had its equality and diversity policy in place,

³ <http://www.eurofound.europa.eu/areas/populationandsociety/cases/uk006.htm>

including age, offered flexible working opportunities, provided pension arrangements to which the company contributed regardless of age and offered health and wellbeing support (e.g. through gym membership and massage). At that time the company was moving offices in London and involved staff in discussions about their working environment, with a view of providing them with a “comfortable and positive” place to work. Then, as now, there were no cost-benefit analysis of ongoing initiatives available.

4. Development of the initial measure and current practice

The company’s overall approach to age management has continued in much the same fashion and can still be classed as comprehensive.

The change in ownership has not led to any changes in that respect. HBHC brought in different ways of measuring the business and different structures. The new owner also exposed the company to a number of other recruitment businesses operating in similar markets and UK02 Recruitment now works with them both cooperatively and competitively. The change in ownership also presents development opportunities for staff, with, for example, the current Chairman of UK02 Recruitment having become the Chief Executive of HBHC. “We are still the same organization with the same believe”, says the Human Resources Director. And neither has the recession changed this.

Overview: Current policies

Criteria	Parameter value
Status of initiative	Continuation
Target groups	All
Type of measure	<ul style="list-style-type: none"> - Job-recruitment - Changing attitudes - Lifelong learning - Career development and mobility - Flexible working - Health promotion - Redeployment and retention - Exit and transition to retirement
Scope of measure	Comprehensive

Below, the comprehensive approach at UK02 Recruitment is looked at in more detail.

Job recruitment: Recruitment is an ongoing process as the company is still expanding. Taking advantage of the increased supply of experienced staff due to the recession has probably slightly increased the average age of the company’s workforce.

Awareness raising: The company is currently in the middle of training their staff on upcoming (age-related) legislative changes, combining this with a refresher training on diversity. Part of the sessions (2 to 2.5 hours) will look at how to deal with a situation where a client is asking

to discriminate against a certain group of job applicants, using role plays and discussions around particular situations staff had to deal with, including discrimination based on age.

UK02 Recruitment is also in the process of launching a small campaign ahead of the abolition of the default retirement age, emphasizing that the focus should not be on age but on valuing individuals.

Flexible working: The organisational policy is “to treat people as individuals, listen to their needs and fit their needs in with the business”. Various forms of flexible working can be negotiated with the line manager (e.g. working remotely which may be facilitated easier in future given a new secure broadband network the firm installed; or a shortened lunch hour to make their home journey easier). To date, it is largely mothers returning from maternity leave who have requested flexible working and this has, by and large, been granted.

Career development and mobility: There are clear paths for career progression of the sales team based on performance and some opportunities for people to change markets, locations (e.g. if the commute gets too much) or join another company that is part of the HBHC, either in response to individual or business needs. Staff can stay at a particular career level and are not being pushed to move up the career ladder or out. When people are working in difficult markets or the pressure gets too much they can drop down to agreed lower targets but this would not appeal to everyone in a sector which is known for its competitiveness.

Lifelong-learning: Most of the training is delivered internally, with staff training colleagues in their areas of (newly gained) expertise. The company runs a lot of training; across the sites, there was said to be some training running for every team every week. Age does not come into play. It is about personal need and people taking responsibility for their own training needs, asking for formal or informal training via their line manager.

Redeployment and retention: When employees experience a health issue the company will look at ways of supporting and retaining them and has done so in the past.

It rarely happened that somebody required redeployment due to ill health or disability. Should it happen in future, there is an expectation that the firm will support this person, just as it has supported women returning from maternity leave.

Promotion of health and wellbeing: The company promotes healthy living through a number of measures, including: uptake of exercise in a gym or for charitable causes; encouraging healthy eating by providing fridges in every office so that people can bring in fresh food rather than having to resort to buying take-away food for lunch; easy access to massage as this helps to relax tense muscles a result of the desk-based work; and provision of private medical insurance for staff and their families.

More specifically the firm encourages staff to use the gym by offering gym subsidies and giving staff a 75 minute lunch break to attend a gym near work. This is an accepted behavior as performance is not about input but output. A younger member of staff has recently joined a gym close to work, arguing the firms subsidy “does give you a push to do it, because is it

so accessible, you gain the 15 minutes extra, you are not in a rush and you get a contribution towards it” and it works out £15 per month in this particular case. The firm is aware that all it can do is to facilitate this. Uptake or attendance is not monitored, but in most offices there will be people taking up the gym and kitbags are often seen under staff’s desk. People across all ages very reported to get involved in physical activities through the gym or charitable causes.

At its largest office, where it is viable, staff can avail themselves periodically to a massage on the firm’s premises, paying fully for the service.

Retirement: The firm has no retirement age and leaves the decision to staff to retire when they are ready. However, the company currently does not have many employees aged 50 or over and, to date, only had one employee who worked until the age of 67.

As part of its corporate social responsibility, UK02 Recruitment continues to offer *volunteering* opportunities with its own chosen charity of the year and encourages staff to volunteer with any charity the employee wishes to support through a matched time programme. This means, for dedicating one day of their own time to volunteering, staff will get a day of work time. Volunteering for the charities UK02 Recruitment supports may involve helping young people with CV writing or preparing for job interviews or online mentoring young people who are bullied, and this may just be an hour at the time. While this makes a big difference to the charity and the young person, it also offers benefits to the employee, in the sense of feeling good about helping someone else, and provides a balance to their sales driven working environment.

Transferability: The following two policies and practices were seen as transferable to other organisations and key to age management: a performance culture and treating people as individuals. If there is a clear focus on what the organization wants its employees to achieve - at UK02 Recruitment everybody works to performance targets - decisions are performance based and will be clear, transparent, and fair. It was recognized that treating people as individuals may be more difficult to achieve in practice in very large organisations though possible by devolving responsibility down to local level.

5. Concluding reflections from the researcher

Human resources management is led by an individualistic approach and a strong performance culture. While the company currently has few older employees, managing an ageing workforce in future is not expected to present any problems due to the company’s HR management approach. Performance is key, regardless of age, but there is the willingness, coupled with creative thinking, to help employees adapt their working lives to changing circumstances in their lives, judging by past experience. Still, given the competitive nature and the pressure of the job, some people may prefer to change jobs instead.

As a recruitment agency the company pre-selects candidates for their clients and can play a crucial role in this by educating clients on diversity issues and by focusing on the skills and abilities of the candidate, regardless of age or other demographic criteria. This is being

supported by training staff on diversity issues. A discerning feature is also the company's periodic engagement in campaigning for age diversity, ahead of the introduction of legal changes around age discrimination and, currently, the abolishment of the default retirement age.

The company's HR management approach and its way of providing recruitment services are clearly communicated to new employees through an induction at the Head Office, where they also meet the senior management team.

On a different note: According to the company's own experience, age was overall perceived to be less of an issue compared to a couple of years ago, partly because the introduction of the age discrimination legislation in 2006 has increased awareness around age related issues, and partly because organisations recognize the necessity to employ older workers due to changing demographics. The company still comes across pockets of resistance when trying to place older workers, particularly in organizations without a performance management system in place. Overall, it was often said to be easier to place older workers in sectors with particular skills shortages or in jobs requiring specialist skills if older workers can match the required skills set.

Interviewee: HR Director

Type of measure: Comprehensive

Executive summary

UK03 Care is a residential care home specializing in dementia care for older people. It is owned and run by the local council and employs 67 people. Most employees work shifts on a rota based system, and about a quarter are on a relief contract, working shifts on a demand led basis. This provides flexibility for both the employer and employees on both types of contracts. The home has a mature workforce with more than 50% of staff being aged 50 and over. Along with other council owned homes it has been earmarked to be sold off to the private or voluntary sector due to budget pressures.

The care home recruits across all age groups; provides opportunities for flexible working to suit people's work-life balance; encourages people, including older workers to engage in training, while respecting the disinclination of some older carers to engage beyond mandatory training; and provides opportunities for care workers to extend their working lives, although this may be under threat given the impending change in ownership. Health and safety legislation as well as good moving and handling equipment help to reduce the physical demands of the job. Occupational health services provided by the council and temporarily reduced workloads facilitate the return to work. These policies and practices can be considered as a comprehensive age management approach, although the term as such was not used.

UK03 Care is an example where the policies of the council and the management style of the person in charge combine to provide much support for staff, including older workers, to stay at work, return to work or extend work beyond the traditional retirement age. Being part of a larger organisation also provides resources and opportunities beyond those available to small employers (e.g. redeployment or occupational health services).

1. Organisational background

The residential care home is located in a rural part of the Midlands and specialises in dementia care for older people. It was established in 1986 and is owned by the local council. The home provides personal care and accommodation for its 34 long-term and 4 short-term residents. Many of the residents, aged 59 to 104, have been diagnosed with dementia. There is a mix of funding, with services being partly or fully funded by social services or entirely self-funded. In an adjacent unit the home also provides day care for up to 12 people a day, enabling dementia sufferers to live independently in their own home for as long as possible. The day care centre provides respite care for carers on two days and dementia assessment services in partnership with the local National Health Service Trust on the other three days of the week. The latter services are nurse-led and include assessing daily living skills, mini health tests to ensure that the medication is right and may also include interventions.

The home employs 67 staff, including social care staff in the day care centre, with 63% of staff working part-time, i.e. less than 37 hours. The workforce is predominantly female (96%) and at least 50% of staff are aged 50 and over. A high percentage of care staff have achieved the National Vocational Qualification (NVQ) level 2 in care (89%) and 70% have either achieved NVQ level 3 in care or were studying towards it. The workforce consists of carers, senior care team leaders, the day centre organiser, cooks, drivers, administrative staff, a general assistant, the care taker and the manager. Generally, labour turnover was reported to be 'very low'.

Criteria	Parameter value
Size (no. of employees)	Small (67)
Sector	Human health and social work activities, public
Trade union	Yes

Key organisational challenges: A decision has been taken by the council to sell off a number of care homes, including this one. This has been triggered by a need to reduce the overall council budget and is expected to lead to shifting resources to supported housing for older people. It is envisaged that a private or not for profit care provider will take over the home at some stage. This decision has prompted some staff to look for other jobs.

Social Dialogue: The council recognises a number of trade unions, including Unison, the public sector trade union, which represents people working in social care services.

2. Age management approach

The owner of the care home, the local council, has a range of policies in place supporting employees. This is underpinned by an equality and diversity policy, which makes specific reference to the age dimension. The policy is being assessed by regular monitoring of the applicants' and the workforce profile with regard to all dimensions of equality and diversity. The care home manager asserts that the council not only complies with the law but "does one better". And expanding on that: When it comes to enable someone to remain in work, "the council is generally into best practice". The care home manager is guided by these policies and herself very supportive of developing employees and enabling them to remain in work.

The care home recruits across all age groups; provides opportunities for flexible working to suit people's work-life balance; encourages people, including older workers to engage in training, while respecting the disinclination of some older carers to engage beyond mandatory training; and provides opportunities for care workers to extend their working lives, although this may be under threat given the impending change in ownership. Health and safety legislation as well as good moving and handling equipment help to reduce the physical demands of the job. Occupational health services provided by the council and temporarily reduced workloads facilitate the return to work. These policies and practices can be considered as a comprehensive age management approach, although the term as such would not be used. More details on these policies and practices are provided below.

3. Current practice and how it has evolved

Job recruitment: The council’s application forms do not ask for the date of birth. Sometimes contextual data provided by the applicant in the application form (e.g. children have left home) may give some indication of the applicant’s age.

The manager has recently recruited three people for different areas, including a school leaver, who according to law needs to be supervised until the age of 18, and one older worker. They have all been recruited on relief contracts, given the decision to sell the care home.

Overview: Current practices and policies

Criteria	Parameter value
Status of initiative	Continuation
Target groups	All
Type of measure	<ul style="list-style-type: none"> - Job-recruitment - Changing attitudes - Lifelong learning - Career development and mobility - Flexible working - Health promotion - Redeployment and retention - Exit and transition to retirement
Scope of measure	Comprehensive

Flexible working: Care staff normally work shifts on a rota base, with about a quarter of staff working on relief contracts. The working hours of staff on relief contracts are demand led in the sense that staff will pick up shifts from colleagues who announce on a notice board that they want to swap shifts. The relief contracts build in flexibility for both the employer - who can manage scheduled and unscheduled absences - and the employees - both those on regular contracts, as they can swap shifts, and those on relief contracts, as some people do not want to commit to a rota. Staff on relief contracts are employed on the same terms and conditions: permanent contract (after a while), same pay (including holiday and sick pay leave) and training opportunities. There were reported to be always shifts on offer for relief workers.

Popular are 21 hour contracts, where staff are guaranteed three days and 18 hours for night staff. Older workers may prefer a 21 hours contract with the option to take on more hours as and when required, with a couple of them effectively working full-time.

There is also flexibility to alter working hours in response to changes in people’s lives. For example, an older employee opted to work part-time to allow for changes in his work-life balance. Another example is a member of the social care team who recently wanted to change her working hours to accommodate changes in the working pattern of her husband. Having looked at different options, in the end the employee opted for a relief contract, working nearly the same amount of hours she worked previously.

Awareness raising: Equality and diversity training begins at induction, which all new staff attend, and is then continued as part of other training. The council has its own training department and on the induction programme the manager delivers the equality and diversity strand. It tackles how stereotypes could affect the care of the service user and the working relationship with colleagues. "In order to care for the residents we really do need to be caring for each other and recognising each other as individuals too" argues the manager.

Training and lifelong learning: The council was said to be 'very committed to training', including relevant training leading to recognised qualifications. The manager herself is a trainer and teacher, and promotes training. All employees have a development review which looks at what staff need to do to be fully involved with the aims of the department and what they would like to do in terms of training, even if it is not related to their current job.

Staff regularly attend mandatory training and a number of staff have completed and enjoyed a distance learning course level 2 on dementia and medication until the funding was cut. Given the decision to sell the home, one member of staff who wants to change jobs and move into administration has now been found a company which offers funded National Vocational Qualification (NVQ) level 2 and 3 in business administration. A number of staff have completed NVQ level 3 or 4 respectively in social care, funded by the council.

According to the manager's experience some people are more keen than others to train. Some people in their early 50s still want to progress in their career and are keen to take part in training. Others who may be thinking of retiring within the next year or two, at whatever age, are more reluctant and only attend mandatory training. And some people who have worked at the home for a long time do not want to embark on an NVQ level 2 qualification which has become the gold standard for care workers. The manager does not push them if they really don't want to do it as long as they are up to date with their mandatory training and do well in other respects, such as engagement and supervision.

Previously staff received a pay rise after induction and after having completed the NVQ. Now it is in their job description that a certain level of training is an expectation. Salaries increase incrementally until staff are at the top of the scale. While this makes experienced staff more expensive the difference is that this person can work independently while the beginner needs support.

Career development and mobility: Within finite resources, the council tries to facilitate training required for career progression. Following the development review the care home also communicates to the council's training department if there is currently an unmet training need.

Health promotion: Health and safety legislation, first introduced in the 1990s, and as well as handling techniques and electric hoists have gone a long way in reducing the physically demanding part of the job, argues the manager. There is still some pushing and pulling but no lifting.

The care home is fairly well equipped with moving and handling equipment which helps to prevent work related injuries and keep residents independent. For example, electronic seats to help get people in and out of the bath, and electronic profiling beds allow adjusting the position of the bed to a level where it is comfortable for the person making the bed, thereby reducing the need to lift the head of the person to push up the pillows. There is a legal requirement to test moving equipment twice yearly to ensure it is safe and fit for purpose.

Previously the manager worked for a different council where they realised that the percentage of sickness absence caused by back injury was high and resulted in substantial costs. Having implemented better health and safety measures sickness absence figures subsequently dropped.

Redeployment and retention: The care home provides reasonable adjustments for workers with health problems. Where necessary, staff may be allocated different duties following a risk assessment by the manager, e.g. a person with pain in her side may be working as a second, supporting person on the hoist or walking with residents. The decision is then being communicated to the council which is very supportive of such cases. However, the caution was that this only works if there are not too many people with this type of adjustment at any one time.

If staff are on long-term sick leave the manager will liaise with the council's occupational health department, generally after a period of four weeks. Their advice and recommendations, for example for lighter duties or a phased return to work, are a great help to the manager, who feels a duty to support staff, and by doing that, to help spend public money efficiently.

Although this is a small home, there are redeployment opportunities across the council. Jobs are initially advertised internally to help retain valuable staff. Candidates for redeployment will be given support to meet the minimum requirements for the job. The manager has taken on experienced re-deployed employees, e.g. a worker from another council owned social care unit which closed down. Furthermore, both opportunities for flexible working and training also facilitate staff retention.

Exit and transition to retirement: Staff can request to work beyond 65. A letter from personnel will notify staff around eight months before turning 65 that they need to see their manager if they want to continue working, else the contract will terminate. The decision of the manager then needs to be approved by the council, which, to date, has accepted all requests, but asks for regular six monthly meetings between manager and employee. The care home currently has three members of staff over the age of 65. However, the manager fears that in the current economic climate their jobs may be at risk and that they may be asked to retire.

4. Concluding reflections

The case study was chosen from the UK ASPA employer survey on the basis that the care home had a range of policies in place for older workers. On closer inspection these policies applied to the entire workforce, which is largely made up of mature staff. During the initial

exploratory conversation it became, however, clear that there was substantive material for a case study.

Interviewee: Care home manager

CASE 4: VOCATIONAL TRAINING CHARITABLE TRUST

Type of measure: Diversity, training, lifelong learning, knowledge transfer, career development, flexible working practices

Executive summary

The Vocational Training Charitable Trust (VTCT) is a specialist Awarding Body which offers NVQs, Scottish NVQs and other qualifications in the hairdressing and beauty sector. It is an educational charity, based in Hampshire, but works with over 500 colleges and private training providers nationally. In the past five years it has grown substantially, has had a new Chief Executive Officer and has been through a major restructuring and rethinking about the culture of the organisation. These factors have all been associated with developing the current approach to Human Resources.

In 2010 48 staff worked at head office with about 50 more working as national assessors. Turnover was £5.1 m, with an operating surplus of £500,000.

The age structure of the workforce is: 31% aged 50 or above, 38% aged 30-50, and 31% aged under 30. The company recruits well without any marked labour supply problems. Its main challenges are the pressures of the complying with national regulation. There is no trade union representation but there is an employee forum which meets regularly and acts as a channel for discussing ideas from senior management as well as ideas from employees. This is considered a productive feature.

VTCT invests heavily in nationally accredited training for all employees, seeing this as part of the organisation's purpose and the two measures discussed below are in this category. It has no explicit age management policy but opportunities and support are available to staff without regard to age, but addressing the particular needs of their roles. Its HR approach focuses on individuals, and any specific age-related issues would be addressed within that.

1. Organisational background

The Vocational Training Charitable Trust is a specialist Awarding Body established in 1986, building on qualifications which had been offered from 1962 by the Society of Beauticians, later the International Health and Beauty Council. From 1983 on it included the Institute of Sports Therapy. Later these became the Health and Beauty Therapy Industry Training Board, before becoming the present charity. Since 1986 it has been a government approved specialist Awarding Body for National Vocational Qualifications (NVQs) in the hairdressing and beauty sector. VTCT works throughout the UK with over 500 further education colleges and private providers from the sector and in a few places abroad, mostly English-speaking countries (see www.vtct.org.uk).

Criteria	Parameter value
Size (no of employees)	Small (Under 100)
Sector	Educational Charity
Trade union	No. Non-decision-making employees' Forum

VTCT accredits training in courses in the broad areas of:

- Beauty therapy
- Hairdressing
- Nail services
- Sport and active leisure
- Complementary therapies
- Business skills
- Diploma
- Functional skills
- Workplace core skills (Scotland)
- Other qualifications

Each qualification is offered at several different levels and comprises numerous specialised units.

The head office of this non-profit-making organisation is at Eastleigh in Hampshire. Turnover was £5.1 m, with an operating surplus of £500,000. (Awarding bodies are required to maintain adequate reserves.)

The charity is made up of three Directorates: the Executive team of five people; Business Development, covering qualifications development, marketing, customer service and assessment teams; and Operations which includes IT, Chief Verifier, quality assurance and records teams. Along with Finance, Ht, Training and Development report to the Chief Executive.

The workforce: In 2010 48 staff work at the head office and another 50 in the regions who mostly work from home as national assessors. The organisation has grown from fewer than 15 people at head office just six years ago, and 35 working these in 2008. 31% of employees are aged 50 or above, 38 % aged 30 to 50 and 31% aged under 30. About two-thirds are female. The workforce is unusually diverse for this region: Hampshire has 1% non-UK workers but at VTCT it is 10-15%, the largest group being Polish, but with people from many different origins. There are just four part-time employees and no manual (or 'blue collar') workers.

The qualifications of staff vary according to the post. Most of the management team have a degree and many have a postgraduate qualification. Others, from a sectoral background, may have fewer qualifications, especially among older staff, some of whom might have had limited opportunities when younger to do exams or gain vocational qualifications. VTCT has invested strongly in supporting all employees so that they can gain qualifications, seeing this as part of its organisational culture. Labour turnover is 8%, lower than average for the charitable sector, and much reduced from 2008 when it was 23%.

There are no major labour supply problems. The organisation pays well for the area and job advertisements draw a good response. There is also an 'internal' casual worker bank. The only recent difficulties have been in appointing at senior levels eg the Chief Verifier post and the Assessment Manager role. These took time to fill because of the mix of skills required: specialist therapy skills, substantial experience of management in the sector, and experience of education.

Key organisational challenges: As the charity has expanded in recent years its main challenge has been in meeting the pressure of tight external regulation processes with which it must comply in designing qualifications and operating systems. This is a competitive market, with two very large alternative awarding bodies and several smaller ones whose portfolio is similar to that of VTCT. Recent changes since the new Conservative-Liberal democratic government was elected in 2010 include the abolition of the national Learning and Skills Council (LSC) which was the main source of funds for training providers who then pay registration fees to VTCT. This has not yet had a marked impact on activity and an alternative system will develop. Senior managers remain optimistic, but as the main customer group is further education colleges, in the face of such changes, VTCT intends to diversify its customer base, possibly working with prisons, hotel chains and outside the UK.

The Annual Report for the year ending July 2009 (p4) included:

Objectives for the year

The Charity's main operational business objectives in 2009 were to further update our integrated ICT system, including introducing E-learning and E-testing, significantly improve customer service, update and improve our qualifications, to achieve new working partnerships with key stakeholders, to improve the office accommodation and to reorganise office operations. In addition as the charitable programme matures emphasis will be given to providers for assessing feedback from recipients.

Strategies to achieve objectives

Emphasis has been placed on staff training and development, increasing customer awareness and service, the re-engineering of business processes, a reorganisation of staff structure and the creation of new examiner teams. New ICT capabilities have been provided for centres.'

Social dialogue: There is no formal union recognition, though individual employees may belong to a union, and there are no collective agreements specifically aimed at older employees. An Employee Forum was set up as part of the major restructuring exercise, with a cross section of staff who discuss issues big and small. It meets monthly with a quorum of four people, but often up to seven attend and others can be drawn in for particular purposes. The Chair of the Forum (the Customer Service Supervisor) had at times found it hard to attract volunteers and has worked to make the role more appealing so that it is not always the 'dedicated few', with some success in that some younger people were getting involved. One express aim of the Forum was to improve communication, and the Chief Executive (in post less than two years) had worked hard on this. Ideas from senior managers were often introduced to employees through the Forum which then gathers opinions which the Chair

conveys to the Chief Executive. Similarly, ideas generated by staff are often brought to the Forum, either directly or via a Suggestions Box in a kitchen area. Also in the kitchen, a collage on a notice board is a vehicle to show at a glance what has been achieved by the Forum, with colour coded stickers giving a visual snapshot of ideas under discussion or changes which have already been achieved.

The Forum does not have decision-making powers but can represent staff concerns, such as requests for a half day's shopping time before Christmas (refused) and for a space for prayer (a room was made available, to be used only outside working time). A Forum newsletter goes to all staff, with the Chair finding that giving people a paper copy proved more effective than simply emailing it. The charity intends to relocate from its present head office so a recent newsletter featured an employee survey to gauge people's opinions about issues concerning relocation. Even if staff are not always eager to put themselves forward, in these ways, the Forum is an active source of ideas and sounding board.

Since 2008 the major restructuring designed to support the business and comply with heavier regulatory obligations has taken place. Much work has gone into improving the organisation's culture, setting out structures and processes which were previously lacking or minimal, and encouraging staff to engage with its aims. One aspect was to inform staff better about the processes underlying its business as well as structural features. The Forum and Newsletter are seen as playing a productive part in this and the training described below was introduced in this context of organisational development.

2. Age management approach

The age split in the organisation means that staff younger than 30 years frequently work alongside those aged over 50 in similar jobs. This is not a formal work shadowing policy but has naturally come about as part of working practice as VCTC has expanded. Its size and culture may have encouraged this: the HR manager spoke of a 'lack of oddness' about this pattern. While being very cautious at the broad generalisation, she did suggest that younger people tended to have better IT skills, while more mature staff would sometimes be 'more thorough': however people learn in their jobs from each other.

The charity was mentioned in relation to age issues in research published in 2010 by the Chartered Institute of Personnel and Development (CIPD) and the Chartered Management Institute (CMI). However the HR Manager was very clear that there is no distinction between the opportunities and support offered to staff in different age cohorts. In that sense, the organisation takes a lifelong learning approach, focusing on the individual's career development. The job application form asks for the candidate's date of birth. Salaries are incremental and performance-related, not service-related.

In the case of any health-related difficulties, the company would look at the situation and try to work out what the individual employee would require. Advice had been given by the Finance Department about 'salary sacrifice' options, but this applied to employees of all ages. The Default Retirement Age has been used, though different arrangements have occasionally been made with individuals.

The HR manager estimated that most staff would stay for about three years, but two existing employees had been with VTCT for over 10 years and one person had been associated with the charity (previously on a different contract) for 30 years.

It has been rare for carers to make any special requests for flexible working, but two staff with responsibilities for elderly relatives had taken this option. Jobshare is possible. The nature of the business means that core hours of 10.00 – 12.00 am and 2.00-4.00 pm must be guaranteed, but the customer service supervisor had agreed to some variability eg to allow for a member of staff who had a long bus journey and infrequent service.

VTCT's Diversity Statement on its web site is interesting in that it is couched in very general terms. It focuses on diversity and inclusion and does not mention age, or indeed gender or disability:

'VTCT and its Board of Trustees value diversity and believe that people from differing backgrounds can bring different ideas, perspectives and experiences to all aspects of learning and development.'

VTCT is fully committed to treating everyone fairly, with respect and with dignity in their employment and in their learning.'

The approved colleges and private providers of training are obliged to have their own diversity or equal opportunities policies and practices.

3. Current practice: two training programmes

Each employee has an annual appraisal where training is discussed, a six-month review, and each has a professional Development Plan. Training is important to the organisation: though some training is done internally, specialists are also called in, as for training in proof-reading. The HR department aims for a balance between the employee's needs and those of the organisation, and values accredited training. It has been encouraging a better dialogue between managers and staff: the HR manager said that, rather than 'one size fits all', they have tried to make training more personalised.

Two of VTCT's five core values are:

- **'Exceptional customer service:** through a professional informed manner.
- **Continuous improvement:** embracing modern technologies and self-assessment processes to optimise efficiency and effectiveness'

The two training programmes which we discuss support these values. The HR manager holds the budget. There were internal and external motives: in both cases the aim was to 'badge' staff as having recognised skills, but also to support organisational development during a period of rapid change. Existing limitations were tackled and new skills and knowledge gained.

Customer service training: Almost all employees now have NVQ Level 2 in Customer Service, and all those working in that specific department have Level 3. People were given time to do this and the organisation paid. The cost was evidently quite modest, certainly less than sending staff out of the workplace to attend the local college. There was some initial reluctance from certain employees, possibly because they were very experienced; however the decision to bring in one of VCTC's own assessors to deliver some of the training helped in that she was very supportive of anyone who was uneasy at the start. Some may have hesitated because they had not been in a formal learning situation for some time. Finally, the NVQs use a different style of learning from what some of these people may have known previously. Customer service staff are usually very busy dealing with clients, so it was not always easy for them to assemble the evidence needed and collate the forms to complete the portfolio. All these factors made it especially important that the right person can deliver the training and support to sustain the momentum and foster confidence.

It proved inappropriate for some staff to do Level 3, sometimes because their job did not provide enough opportunity to collect evidence: the head office receptionist for instance meets visitors to the office and does not as a rule have direct contact with clients, so she worked for Level 2. Each group's achievement is celebrated in a small ceremony with refreshments. Overall, take up was good and those who embraced the NVQ and gained it easily also supported others. In some areas the training refreshed existing knowledge or expertise, in others it developed new skills and understanding, or introduced new concepts which had been unfamiliar. The cohorts have decreased as the organisation reaches saturation because fewer employees lack the qualification. For certain roles, the NVQ is discussed at job interviews. Most interviewees, it was said, welcome the chance to do this if they do not have the qualification. New standards recently written for Level 4 mean that there is likely to be follow up training at some stage.

Management training: The Chartered Management Institute is the UK's only chartered body specialising in management and leadership. Eight managers completed the CMI Level 5 Diploma in Management Training and supervisors are doing Level 2. The customer service supervisor had found this hard work, saying that this may partly have been because it was some time since she had done training of this sort, but she completed fast. The HR Manager had recently completed a professional course which included management theory etc, and therefore found that she had not gained hugely, but she valued the common input and shared experience of participants.

There was no formal evaluation but a report to the Trustees tracked some possible effects of these programmes. The HR Manager spoke of better relationships probably as a result of people doing workshops together. Other indicators were that grievances had reduced, absence through sickness had decreased, and so had staff turnover. However she was cautious about attributing these effects directly to any one initiative since cause and effect can be more subtle and complex. It was probably too soon to know for certain whether the training programmes had helped to reinforce organisational culture, but most of all she stressed the wider benefits of this investment because it showed VTCT's commitment to employees' futures as well as to building capacity within the organisation.

4. Concluding reflections

VTCT is a charity so it is non-profit-making, though it generates a surplus and has strong reserves. Historically it had taken what was described as a 'modest' approach and did not focus on corporate advantage. Changes in the Board of Trustees and in the management had encouraged a more outgoing style. The up-skilling of staff in the two programmes outlined fit with this overall aim to improve how the charity functioned and to develop its image. We were told that though widely known nationally, the organisation has had a lower profile locally. Some job applicants seemed unaware that VTCT was a charity, while others knew this and were especially attracted to it because it was one. The ambience of the organisation has been a feature of the reshaping of structures, systems and communications accompanying a period of growth and a stronger attention to career development for all employees. The age profile of the workforce was not planned as an age management strategy but it does encourage knowledge transfer. Though age cohorts are not identified, the organisation exemplifies a lifelong learning approach, where relevant training and professional development is open to employees of any age.

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www.cipd.co.uk (Chartered Institute of Personnel and Development HR Practice Development Team)

www.managers.org.uk (Chartered Management Institute Policy and Research Department)

www.vtct.org.uk

Interviewees:

Human Resources Manager

Customer Service Supervisor

Contact

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CASE 5: ST. EDWARD'S SCHOOL, OXFORD

Type of measure: Training and lifelong learning; Career development and mobility management

Executive summary

St Edward's School is an independent (fee-paying) school for children aged between 13 and 18. It currently has 659 pupils, nearly 80% of whom are boarders in term time. It has attractive premises on the edge of the city of Oxford and employs about 410 people as teachers, administrators, and as technical, domestic and catering staff. The school's standard retirement age is currently 65 and it has always participated in the national Teachers' Pension Scheme. Non-teaching staff are also eligible to join one of two pension schemes. Most staff continue to work until their normal retirement age under their respective scheme: to date there have been few early retirements.

For non-teachers, a recent innovation was the introduction of a level 2 National Vocational Qualification Certificate (NVQ), delivered by the Oxford and Cherwell Valley College (a local Further Education College) and funded by the previous UK government's national "Train to Gain" programme. The "Train to Gain" initiative was cut in the government's Comprehensive Spending Review in October 2010.

A recent transition period for the school saw the appointment of a new Catering Manager (and an assistant post) a new Head of Domestic Services (and two assistant posts) who reviewed training provision for cleaning staff. A new post of HR Manager was created. Previously many aspects of personnel had to be handled by the Payroll Manager who also has the role of Recruitment Manager. These key elements of organisational change aimed to bring in more resources with a more professional approach to HR issues.

This focused case study addresses particularly the introduction, implementation and effects of the NVQ in Cleaning for individuals and for the organisation.

1. Organisational background

St Edward's School is an independent fee-paying selective co-educational school for pupils aged 13 to 18. Nearly 80% of pupils board; others live at home locally. Of the current pupils, 267 are in the Sixth Form (last two years pre-University). The school recruits nationally and internationally and has been wholly co-educational since 1997.

Girls now comprise 35% of the students. It operates in spacious premises with a mix of historic and modern buildings on the edge of the city of Oxford. There are extensive sports grounds.

The school was established in 1863 and is a charity providing educational and boarding facilities. Some buildings and services are hired out in holidays for summer schools and at other times for special events. There are around 410 employees.

The school's Annual Return to the Charity Commission for 31st July 2009 showed Total Incoming Resources (including school fees) of £16,222,360 and Total Resources Expended of £15,655,902.

Of 408 employees in mid 2010, 236 were female and 172 male. Among the teaching staff, the gender split was about 60/40 (male/female). Most, though not all, cleaners are women.

The school employs non-teaching staff in administrative roles but also technical, domestic and catering posts. Of the 410 or so employees, 120 are aged 50 or more. Cleaning staff are mainly 50 or more years of age. Younger cleaners are often migrant workers, who may be in the UK in order to improve their English language skills.

Staff from outside the EU must have a visa; where necessary, the school sponsors them on the national points-based system. In January 2010 about 20 staff were from outside the EU.

In 2010, three-quarters of the staff (about 300 people) had "white collar" jobs (this covers a wide range of job types, not only professional, administrative or technical). Part-time employees numbered 124 women and 43 men. This varied according to sector: almost all cleaners were part-time but there were few part-time teachers.

Over the academic years 2008/09 and 2009/10, the average retirement age was 67 (59 for teaching staff and 68 for non-teachers, including administrative staff).

Labour turnover was in 2010 stable: approximately 140 people left and 140 joined the workforce. Some staff are inevitably shorter term, such as people brought in to cover absent employees, or sports coaches, most of whom stay only one year or less. Catering usually shows more movement but this has recently reduced.

Historically, the main shortage area is in appointing science teachers. Otherwise, the vacant posts recently advertised have drawn a strong response. It is relevant that the school's site and working environment are very attractive for both teaching and non-teaching staff.

Social dialogue seems to be invisible or patchy. While teachers may belong to one of the teaching unions, the Recruitment Manager was not aware which unions were involved, or which teachers were members. Similarly, some non-teachers might belong to a union but there was no day-to-day sign of this in the school. Any employee with concerns would raise these through his or her teaching department, or through the line manager. Any such concerns had to date been dealt with on an *ad hoc* basis.

As with any fee-paying school, the key organisational challenges here relate to the prevalent economic climate and concerns about pupil numbers. A term's fees for a boarder are £9,553, with additional payments for extra-curricular activities such as some sports and music. There are three terms per school year. To date the school has continued to attract applications at a good level and any adverse effects associated with the recession could take some time to show - parents may be reluctant to move a child out of a school where s/he is settled. However, those who do not yet have a child at a fee-paying school may review their

intentions if the economic situation becomes more difficult. In the past ten years, new high specification boarding houses have been built and an old building converted into a stylish small arts centre with exhibition and performance spaces which are used both by the school and by national/international groups and artists to stage exhibitions and performances which are open to the public.

2. Age Management Approach

As with most UK organisations, the term “age management” is not in general use. When St Edward’s School responded to the Work Package 1 survey, six policy areas relating to age management were mentioned:

- Part-time retirement opportunities
- Reduction of working time before retirement
- Early retirement schemes
- Reduction in task and salary
- Adaptation of workplace or of machinery used e.g. ergonomically
- Reallocation to specific positions or reallocation of staff to suit their capabilities.

In practice, our first contact at the school thought that the first three of these would be covered by the national Teachers Pension Scheme and would be a matter of the individual teacher’s decision, and with the school’s agreement. In the second three areas, each case would be looked at on its merits.

There is no explicit policy focusing on older employees and no special agreements to address their needs. However the school’s Equal Opportunities policy does mention age, which is not the case with all organisations. A teacher who developed an age-related physical problem would talk with the Head of Department or the school’s Warden (Headteacher). A non-teacher would raise this through the line manager. Such cases could in the past come to the Payroll Manager but are likely in future to be handled by the recently appointed HR Manager who has been reviewing and developing statements on areas such as sickness and absence.

Changes in the past three years have had an effect on the school and have stimulated the measure which we discuss below. Health and Safety and issues relating to ergonomics or risk assessment (eg for pregnant employees) are already dealt with separately by a different administrator. Three years ago a new Manager for Domestic Services was appointed and reviewed many areas of practice. One outcome was the introduction of the NVQ in Cleaning. In 2010, a new post was created of HR Manager (for 20 hours weekly). These steps demonstrate a sharper awareness of the need to give more attention to HR issues, rather than relying, as before, on the Payroll and Recruitment Manager to cover all these areas.

Flexible working is not widespread: any request is carefully considered, but as the HR Manager observed, it is not “labelled” as such. There are several examples of staff retiring but continuing to work on more limited hours for example a retired science teacher worked on as a technician and reduced his hours and another retired teacher took on the post of

administrator for the school's arts building. The HR Manager emphasized that in any such case, the issue is one of capability rather than simply a matter of age.

Her current task is to write policy documents in several areas to provide a clearer framework for existing custom and practice, taking account of developing obligations. Age is not a priority area but she is acutely aware of the coming legislation regarding retirement age. She aims for a system which will enable managers and staff to have a better dialogue about performance. At present teachers have Professional Development Reviews with colleagues but the intention is to bring in appraisal for all staff.

Though the organisation had not prioritized age as such, it had always participated in the national Teachers' Pension Scheme. More interesting for us is that the school introduced a measure which benefitted especially older (and female) workers.

3. Current practice and how it has evolved

There is a separation between teaching and non-teaching staff in that in-service training for teachers (INSET) is organized through teaching departments and senior managers while training for non-teaching staff is now handled by managers with support from HR. An exception would be the training provided for staff involved in recruitment on Safer Recruitment, arranged by the Recruitment Manager, in conjunction with the school's child protection officer (this included the role of CRB checks and questions to put at interview to help establish who should or should not be employed).

The Manager of Domestic Services came into her post three years ago having previously worked at one of the Oxford colleges (constituent, mostly ancient, colleges of the University of Oxford). She reviewed the training for cleaning staff, found it inadequate and, having previous experience of the NVQ qualification, she proposed making this available to all cleaning staff. This was part of a general restructuring which included tighter schedule planning and contributed to a culture change for staff, some of whom had held their jobs for many years. The motive was therefore partly internal and partly external. She was aware that locally many Oxford colleges had made it a requirement to have NVQ accreditation for such jobs. Moreover, as a learning programme, the NVQ also provided a framework for up-skilling cleaning staff.

The programme was funded under the then government's "Train to Gain" initiative; there was therefore no cost to the school nor to any individual. The system provided training and support by assessors from Oxford and Cherwell Valley College (OCVC) for 40 cleaning staff over an 18 month period. The assessors worked with four groups of ten employees, and devised a tailor-made package for the school, drawing on elements of their usual training programmes.

Participants took part in training sessions, documented their work and were observed by an assessor who then helped them to cross reference skills which could be presented as evidence in the NVQ portfolio.

This training was open to all cleaning staff, including the younger group. The recently appointed HR Manager felt that it had boosted self esteem. In interview it was clear that the more mature employees had gained much from the experience overall, despite its rather uncertain start.

Initially, many had doubts and some older people decided not to take part at all. In interview two long-standing employees recalled their first thoughts. One had worked at this school since 1997, the other for almost 16 years. Both were aged over 50. When the new Manager had proposed the scheme, Janet explained "We weren't 'anti' – it was more: 'what's the point of it?'" Some people were uneasy about the idea that they would be observed at work. Confidence levels varied: Linda commented: "You get nervous when you're out of any education for yonks".

They understood at this stage that participation was optional, but when the list arrived, their names were on it. They decided to see what this would entail. The first meeting had proved critical in allaying doubts and fears. The NVQ Assessor took pains to explain that this was work-based learning and no-one was going to be tested. Experience elsewhere was that committing to a process like this can be "a bit scary". She also encouraged participants to take the numeracy and literacy qualifications because these can support the Cleaning NVQ. (This assessor is now employed at the school as Assistant Domestic Services Manager.)

When the 40 participants completed, there was an event at which certificates were awarded and photos taken. In addition, the school gave each person who completed a gift of £50 in recognition of their achievement. (This is not a feature of the scheme nationally but the employer's decision.)

The process proved to be a positive one. Linda and Janet recalled enjoying the group sessions because, although they always work in teams and have occasional meetings, there is not the chance to discuss as they had in the NVQ sessions. Janet had enjoyed the group sessions, including the role play which the trainer incorporated within the bespoke package. Linda explained that people also thought that, "If you were laid off, it could help because someone else might plump for you, because all the colleges are doing it". Despite their own long service at the school, they were alive to the local labour market and the possible edge which the NVQ could offer.

All the NVQ activity took place within working hours. This included the formal training sessions, and the observation, feedback and support on a one-to-one basis from the assessor who would draw up an action plan with each person. Each had about eight such visits of one hour. When someone was occupied on NVQ activities, another member of her team would cover.

Despite people's qualms about "writing", the portfolio does not in fact necessitate extended writing, though there are forms to be completed. Participants can use copies of documents such as order forms as evidence of the work they do for their portfolio.

Asked what they had taken from the experience, and whether it had affected how they work or how they feel about their job, Janet spoke about fire safety procedures (after a session delivered by a professional fireman) and health and safety matters. Linda appreciated

especially the Manual Handling training, partly because she had followed the advice given and this had improved her own back. She also recognized the “uniformity” in working practices which had been absent before. The experience had affected their practice in other ways: Linda spoke of avoiding cross-contamination, using coloured cloths in different places and different gloves for different tasks. Janet recalled how the assessor had made her rethink relationships: “I remember when you said “They’re your customers” It seemed weird”. Using such terminology moves people’s thinking beyond their own organisational context Underpinning Knowledge, a sizeable part of the NVQ, partly reinforces or confirms what an experienced cleaner may be doing already. At the same time it brings new knowledge as a framework for practical tasks. The confidence with which these employees spoke of their NVQ experience was telling. Asked whether they would recommend this to others, Linda said she had already done so.

At the time of the site visit, administrative staff said that this programme would be repeated. Putting 40 people through this accredited programme was a large commitment but the HR manager estimated that annually from now on it would probably involve much smaller groups. On 20th October 2010, the UK government announced stringent cuts in many public service areas. These included the “Train to Gain” programme which funded the NVQ initiative at St Edward’s School delivered by staff from the Oxford and Cherwell Valley College.

4. Concluding reflections

The programme at this organisation, though small-scale, is an exemplar of similar initiatives and is revealing. An employer does not have to use the discourse of age management to be alive to the need to get the best from and also to offer the best to older workers. In social dialogue terms, this organisation has no evident union presence: it was not therefore possible within the constraints of this project to meet union representatives. However we were able to interview two long-standing employees who had gained the NVQ qualification. Regarding the lack of union activity, we should note that the school provides an enviable working environment for teaching and non-teaching staff. This will of course affect how people view their jobs and how they assess them against alternatives in the local labour market.

Factors facilitating the success of this measure included a generally benevolent atmosphere where people are happy to work (and because of that some may accept lower wages than they could earn elsewhere). The innovation was possible as part of a wider package of new working practices in this area introduced by a new manager. The training was planned with sensitivity, taking account of participants’ initial uneasiness, and it offered generous one-to-one support and encouragement from independent, external providers. Those taking part enjoyed the novelty of collaborative learning in workshops, presentations and group discussions. They recognised both the new learning and consolidation of existing knowledge which they gained, and this influenced their current working practice. They also knew that this accreditation would be good if they needed at some time to apply for a similar job with another local employer.

Factors hindering the success were initial reluctance which was overcome in the first weeks. Currently the main factor which could hinder further implementation is the question of the cost, following government cutbacks.

The NVQ in Cleaning was introduced as part of a culture change which affected all domestic staff. It certainly involved a 'learning journey' through which more mature employees moved from initial resistance or reluctance, to enjoyment, to growing confidence, achievement and recognition. They were happy afterwards to talk with the researcher about the positive process and its effects on their current working practice. That development among 40 individuals contributed to the progression which the organisation achieved towards a more efficient HR and training framework in this area.

The school intends to repeat this exercise with new cohorts and to require people applying for these posts either to have the NVQ level 2 or to be ready to commit to it. In October 2010 the national 'Train to Gain' scheme ended as part of the coalition government's Comprehensive Spending Review and associated cuts in the public sector. This means that the national scheme no longer exists. The provider (the FE college) will be regrouping staff who were delivering this programme, and the school itself will no doubt be reviewing the sustainability of this work. The HR Manager thought that there is a will to carry on but the NVQ would have to be paid for and at the time of the interview the budgetary situation was not clear.

Interviewees

Payroll Manager and Recruitment Manager
Human Resources Manager
Assistant Manager, Domestic Staff
Cleaner 1
Cleaner 2

Contact details

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References

www.stedwards.oxon.sch.uk
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Type of measure: Comprehensive

Executive summary

UK06 Telecom is the largest communications services provider in the UK and operates in more than 170 countries worldwide. As at 31 March 2010, the company employed around 80,000 people UK wide and around 98,000 worldwide. As a result of technological changes and increased efficiencies workforce numbers have dropped over many years and are expected to decrease further. Women make up over a fifth of the workforce which includes customer services engineers, call centre staff, clerical staff as well as managerial and professional staff. The percentage of older workers has been increasing from 13% in 2001 when the company introduced its flexible retirement policy to 35% in 2010. About seven in ten employees are reported to work flexibly on an informal or formal basis, including 12% home workers and 6% part-timers. The company largely recruits from an internal labour market mainly created by a contracting workforce and a low compulsory redundancy policy.

Age diversity is part of the company's equality and diversity strategy. Key to UK06 Telecom's age strategy are largely age neutral policies. The company offers different forms of flexible working as part its promotion of a healthy lifestyle to people of all ages and has been offering flexible retirement options for nearly a decade. A career life planning tool helps with planning for career changes at any age, and training is provided, regardless of age. There are no age limits in recruitment and the company removed the fixed retirement age in 2005 ahead of legislative requirements. The company only applies the default retirement age (DRA) in areas where it needs to reduce the workforce, and this will change with new legislation abolishing the DRA. There are a number of initiatives around the promotion of health and wellbeing, including a WorkFit programme launched in 2005 and measures to support good mental health. The above measures are among some of main initiatives which earned UK06 Telecom the AARP Innovative Employer Award for three years in a row. Although not focused on age these measures are helping to support older workers.

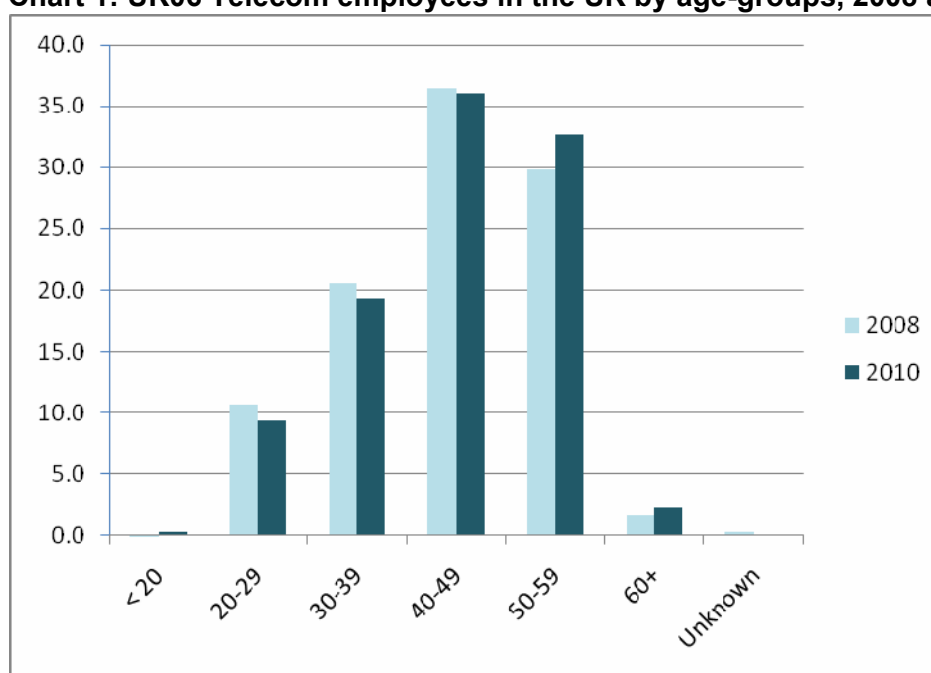
1. Organisational background

UK06 Telecom is the largest communications services provider in the UK and operates in more than 170 countries worldwide. UK06 Telecom mainly provides fixed line services, broadband, mobile phone services, TV products and services and networked IT services. As at March 2010, UK06 Telecom's turnover was £21bn and its reported profit before taxation £1bn.

Criteria	Parameter value
Size (no. of employees)	Large (80,000 in the UK)
Sector	Communications services
Trade union	Yes

In 2010, the company employed around 80,000 people in the UK and around 98,000 worldwide. Over the years the workforce declined with efficiency drives expected to lead to further reductions in staff numbers (UK06 Telecom Annual Report 2010). Most of UK06 Telecom's employees are men, with women making up 22% of the workforce (and 24% of managers). The number of older workers has been increasing over the years: currently 9.6% are aged 29 or under, 19.4% aged 30-39, 36.0% aged 40-49 and 35% aged 50 plus (see Chart 1 below).

Chart 1: UK06 Telecom employees in the UK by age-groups, 2008 and 2010 (in %)



Source: UK06 Telecom Sustainability report 2010 (online version and own calculations)

A large part of the workforce (seven in ten; UK06 Telecom 2007) work flexibly, either on a formal or more ad hoc basis (e.g. working from home occasionally or arranging different working hours with the manager). In 2010, 6% of UK employees worked part-time, under 1% shared a job and 12% worked permanently from home (UK06 Telecom Sustainability report 2010, own calculations based on online data).

UK06 Telecom employs a range of occupational groups: 62% are so-called team members (including, for example, customer services engineers, call centre staff, clerical staff and mechanics) and 38% are professional and managerial staff (working e.g. in human resources, finances or legal services). For some occupational groups, such as customer services engineers and call centre staff, aptitude for the job as well as good customer services skills are very important, for others specific qualifications relevant to their job are essential.

The company largely recruits its staff from the internal labour market. With overall workforce demand in decline and a low redundancy policy for permanent staff in place, redeployment becomes an essential part of HR management. In 2010, around 5,000 employees were redeployed, which may have involved some degree of reskilling (UK06 TELECOM Annual Report 2010). For example, engineers may be redeployed to other engineering roles (e.g. from servicing payphones to the provision of broadband services) or to work in call centres as call advisors. Also, some previously outsourced services have been brought back into the company. As a result, the labour turnover rate is low (3% in the UK).

External recruitment is small in comparison. UK06 Telecom regularly recruits new apprentices (300 in 2010 and 200 are planned in 2011, UK06 Telecom Annual Report 2010) and graduates (currently 30 to 40 per year). In 2010 apprenticeship places were in high demand, with the company having received 800 applications per place. Furthermore, the company recruits people with specialised skills externally, e.g. around client management, largely in other countries. The last recruitment round occurred around three years ago when new laws opened the telecommunications market further, requiring UK06 Telecom to provide access to its network to communication services providers. This led to the recruitment of around 1500 customer services engineers.

Key business challenges: UK06 Telecom operates in a competitive environment. The company aims at reducing its costs further, continuing to improve its customer services and to invest in faster and more reliable technology as well as in new services. Workforce numbers are expected to fall further as a result of cost pressures and due to technological improvements, as a more reliable network reduces the need for repair and ultimately staff.

Social dialogue: The company recognises two trade unions: the Communications Worker Union (CWU), representing employees in non-managerial roles, and Prospects, representing managerial and professional staff (of which 45% were reported to be members; UK06 Telecom sustainability report 2010). The two trade unions engage in collective bargaining around pay and conditions. UK06 Telecom consults the unions on a range of issues, including the development of the managing changing capabilities policy or other initiatives which may have a particular relevance for older workers. There was reported to be “a good track record of co-operation with both unions” (UK06 Telecom sustainability report 2010). Outside the UK there are various works councils. In addition, there is a UK06 Telecom European Consultative Council (UK06 Telecom ECC) which meets four times a year to discuss a range of issues, including the Group’s performance, job and employment plans, training or health and safety.

2. Age management approach: age neutral policies

UK06 Telecom has a diversity strategy in place which explicitly includes age. While the company’s HR policies and initiatives are age neutral, its combined policies and initiatives support the employability of workers and facilitate the extension of working lives. Policies and initiatives of particular interest include e.g. policies on flexible working, training and redeployment, health promotion and flexible retirement. Short references to these have

already been made in the executive summary and further details are provided further down in the pen-ultimate section.

Looking to the future, the senior HR representative, expects little change in the company's HR strategies around age management as the initiatives are already in place. The company will continue to create an inclusive organisation, for example, by offering flexible working opportunities to facilitate people's work-life balances or by promoting the message that it is accepted to ask for help and support for reasonable adjustment.

The company has a number of links with other organisations which focus on age related issues, such as the Employers Forum on Age (EFA), The Age and Employment Network (TAEN), AARP or the International Longevity Centre. This informs best practice and the policies UK06 Telecom puts in place.

UK06 Telecom won the AARP International Innovative Employer Award for three consecutive years since it was first launched in 2007. The U.S. based non-profit and non-partisan membership organisation recognises U.S. and non U.S. employers "whose innovative workforce and/or human resource practices address issues of concern to 50+ workers and create roadmaps for the workplaces of tomorrow" (AARP website) with this award.

3. The original measure

In early 2001 UK06 Telecom introduced its flexible retirement policy following an 18 months development period involving trade unions. The policy was a direct response to an early retirement culture, with most employees leaving at the age of 52 or 53. This was no longer seen as sustainable, with skills shortages within the information, technology and communications sector adding to the need for change. The thrust of the new policy fitted in well with UK06 Telecom's broader policy framework around work-life balance and flexible working as well as equality and diversity. The development of the policy was informed by a random survey among UK06 Telecom employees on flexible working and discussions with UK06 Telecom's occupational pensions department. The policy was supported by a business case for approval by the then executive committee, arguing that the new policy will help to retain skilled staff for longer, reduce recruitment costs, attract a wider pool of talents and sustain the viability of UK06 Telecom's occupational pension fund at a time when fund members enjoy a longer life expectancy (Foster 2005).

The flexible retirement policy was communicated extensively and consisted of the following options:

- *Wind down* - offers employees an opportunity to work part time or job-share;
 - *Step down* - enables employees to reduce their work commitments by taking a lower grade job with less responsibility;
 - *Time out* - allows employees to take phased sabbaticals;
 - *Helping hands* - encourages employees to take up full- or part-time secondments;
- and

- *Ease down* - allows employees to gradually reduce working hours and / or responsibilities, particularly in the 12 months prior to leaving UK06 TELECOM (Forster 2005, p.6).

Due to UK06 Telecom pension regulations (for details of UK06 T Telecom pensions see EFA and IFF Research 2006) and Inland Revenue restrictions not all options were equally financially attractive and staff were advised to seek financial advice before making a decision (Foster, 2005).

Following the introduction of the policy the percentage of the over 50s among UK06 Telecom's workforce nearly doubled from 13% in 2001 to 25% in 2004. The company has also seen an increase in engineers staying on beyond 60. At that time the company's fixed retirement age was 60 but flexibility was applied in areas of skills shortages. There was no cost-benefit analysis at the time the case study was undertaken (Foster, 2005).

Well before the introduction of the new legislation in 2006, UK06 Telecom also carried out a comprehensive age audit of all of its employment policies to identify any age bias and, where necessary, to implement changes (Foster, 2005).

4. Development of the initial measure and current practice

The section aims to provide an overview of key measures adopted by the company to create an age-diverse workforce.

Overview: Current policies

Criteria	Parameter value
Status of initiative	Continuation of the broader age diversity agenda; continuation of flexible retirement; more emphasis on health promotion
Target groups	All
Type of measure	<ul style="list-style-type: none"> - Job-recruitment - Changing attitudes - Lifelong learning - Career development and mobility - Flexible working - Health promotion - Redeployment and retention - Exit and transition to retirement
Scope of measure	Comprehensive

Job recruitment: There are no age limits for job recruitment at all and this includes apprenticeships. The oldest apprentice was thought to be in his or her late 20s, the oldest graduate entry has been someone in her or her 50s, and overall about 5% of workers aged 50 plus are among new staff. The Director of People Services thought it possible for a 50 year old to start work as an apprentice but knows that this does not happen in practice, with

self-selection suspected to play a key role as pay and responsibility would be lower than in previous jobs held.

The age of the applicant is not asked during the recruitment process. Age needs to be recorded though because UK06 Telecom has its own occupational pension plan. Age, along with other dimensions of diversity, is monitored throughout the employment cycle to assess whether statistically there is a bias towards a particular community.

Awareness raising: UK06 Telecom ran many age awareness courses in 2006 around the age legislation and recently incorporated this around the forthcoming equalities act.

UK06 Telecom runs diversity training courses which include the age dimension. The courses involve discussions of filmed pieces and / or reflections of participants' own experiences. They run for two to five hours and are currently mandatory for line managers in one business line.

Flexible working: Anyone, regardless of age, can apply for flexible working with the line manager making the decision based on business needs. As outlined earlier there are a number of informal and formal flexible working arrangements, including permanently working from home (12%) or working part-time (6%).

Career development and mobility: The company has a Career Life Planning Tool which helps employees and managers to plan for changes during their employment with UK06 Telecom and accommodate them.

Lifelong-learning: Training is offered regardless of age. Everybody has to engage in training that is essential for the job, e.g. call centre staff need to attend training on a new product they are going to sell.

Sometimes older employees may close down options themselves by making assumptions, for example that they can't be promoted, move into a new area or learn new skills. However, while older employees may think that they have reached a point beyond which there will be no promotion such opportunities may indeed exist if they are aware of what is required and prepared to achieve this (e.g. working in other parts of the business and learning new skills).

Redeployment and retention: UK06 Telecom has a reasonable adjustment policy through which it manages changing capabilities. This can occur at any age stressed the senior HR representative, but is statistically more likely to happen at an older age. Some jobs at UK06 Telecom require a degree of physical activity, e.g. climbing up poles or going down holes. The first stage of the *managing changing capabilities* process is to discuss reasonable adjustments, e.g. in terms of ergonomics; equipment - e.g. computing equipment that speaks to a person with failing eyesight; reallocating specific duties to someone else; environment; or working hours.

Where this is not possible - the numbers were said to be small - the company will aim to support the employee in finding a different job, looking at utilizing the employees' skills and

reskilling options. When vacancies come up these are declared and made available on the UK06 Telecom internal people system. Before they are being accessible to everyone a review will take place as to whether a suitable job can be prioritized for employees who go through the *managing changing capabilities* process or indeed staff who need to be redeployed because their job will no longer exist.

Promotion of health and wellbeing: UK06 Telecom has a range of measures in place which are designed to help prevent physical or mental illnesses. These measures are open to people of all ages although people may be more affected by some health issues or illnesses as they get older.

There was thought to be a growing awareness amongst major companies that they have a responsibility to support their employees. Moreover, there are potential business benefits as this can reduce sickness absence, improve retention and increase productivity as a result of having a happier and healthier workforce, argues the Director of People Services.

In 2005, UK06 Telecom has launched its *Work fit* programme, initially focusing on cardiovascular problems among managers in mid-life by helping them to adopt a different diet and exercise regime. This has since broadened to include a range of health topics of general interest, such as smoking, cancer, dementia or dyslexia. This has been initiated by the company's Chief Medical Officer and is supported by the trade union and charities which are active in these particular fields.

There is also a particular focus on understanding the importance of good mental health by providing information and guidance for employees and managers. The company has also developed an online tool (called *Stream*) that helps employees assess their stress levels, triggering a conversation between employee and manager if the traffic light style results come back as amber or red. The conversation will establish in what way, work and / or non-work related factors are affecting the employee, and in what way the employees can be supported, also by services provided by third parties as part of the employee assistance programme. Since it was launched 7 or 8 years ago around 60,000 assessments took place with some staff having opted to use it more than once.

Furthermore, UK06 Telecom has also developed a new type of document, called a Passport, which contains information about work related needs or requirements an employee wishes to make known. This document can be made available to the manager (or colleagues, if so desired) and the document can be passed on to a new manager, if a change occurs, reducing the need to replicate information. This is potentially relevant to a wide group of people, including people with disabilities or people with caring responsibilities.

Through its partners, UK06 Telecom provides a range of services, such as occupational health services and an employee assistance programme, providing e.g. free access to trained counsellors to help employees deal with issues that can have an impact on their work.

Carers' network for people with caring responsibilities: This is a recent development having attracted around 100 employees during the first six months of its existence. Although open to carers of any age - and indeed anyone with an interest in this topic – statistically people are more likely to be carers in mid and later life. A key feature of this network is a platform for exchanging experiences and the provision of mutual support, often making use of telephone conferences or web chats as UK06 Telecom employees are located in different parts of the country.

The company encourages employees to form their own networks and requires that a business case is being outlined when proposing the network. Networks self-manage their membership. In total there are nine networks, e.g. on disability or for women, apprentices or graduates.

Retirement: UK06 Telecom removed the fixed retirement age in 2005, a year before the new age legislation came into force. Currently UK06 Telecom still operates the default retirement age (DRA) (65) in areas where workforce reductions are required, but this is going to change in line with new legislation abolishing the DRA. In 2009, UK06 Telecom also changed its pension scheme, moving the pensionable retirement age from 60 to 65, and altered the rate of pension contributions.

Prior to the 2006 age legislation UK06 Telecom employees retired aged 60 but UK06 TELECOM internal surveys undertaken prior to that found that more than 80% wanted to work past 60, a much larger proportion than was expected based on surveys undertaken by other organisations. There doesn't seem to be a particular point in time at which employees retire, rather staff keep on working, according to the Director of People Services. There had only been a few appeals from employees who were not ready to retire at 65.

When people retire in future, following the abolition of the DRA, remains to be seen. 65 may be a watershed also because the state pension age kicks in at this age. The company has performance reviews in place to deal with productivity losses at any age; and some argue that people will make the judgement themselves as to when it is best to retire from their job.

UK06 Telecom still offers its five flexible retirement options outlined earlier which were introduced a decade ago. *Ease down* is effectively a flexible working option people can apply for at any stage, but an option that needs to be reemphasized as part of the retirement options. There is anecdotal evidence at UK06 Telecom that there is less demand for winding down during the current economic situation, as other members in the employee's (extended) family are losing their jobs, such as the spouse or the children, or employees may wish to support a grandchild through university or thereafter when they have difficulties finding their first job. At the time of interviewing there were no figures available about the take up of informal and formal flexible working among older workers.

As employees have more choice in terms of their retirement planning, how best to approach succession planning remains an issue for discussion. While it is clear that it is inappropriate to base succession planning on assumptions about when employees may want to retire,

there are discussions as how best to touch upon this topic during regular career development conversations without directly addressing it.

In 2009 UK06 Telecom piloted a retirement planning course for employees aged 55 plus with a group of 200. This was part of UK06 Telecom's age awareness planning and involved largely advice on financial planning for older age, using lifestyle questions to get participants to think about how they want to shape their life in future and how they are going to finance their life-style. The course was also an opportunity to communicate recent changes in the UK06 Telecom pension system, which, together with changes in legislation, open up more choices for individuals. Now people can continue to work and earn their pension or take the pension and continue to work. The course is being rolled out to the 50plus group. Just over 5,000 people have now either been through the programme or are booked on the programme, in part responding to demand as the course proved popular.

Interviewee: Senior HR representative

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UK06 Telecom (2007) Flexible Working.

UK06 Telecom (2010) Annual report

UK06 Telecom (2010) Sustainability report

Employers Forum on Age (EFA) and IFF Research Ltd (2006) Flexible Retirement: A Snapshot of Employer Practices 2006.

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CASE 7: UK07 - CALL CENTRE

Type of measure: Comprehensive

Executive summary

The UK 07 Call centre is part of the UK's leading provider of warranty services for a wide range of consumer electronics, domestic electrical products and gas central heating systems. The Group (UK07) continues to expand nationally and internationally (mainland Europe and Australia) as the UK slowly emerges from the recession. Employee numbers at the East Midlands call centre peaked at around 900 as the call centre hit its busiest period during the year. The large majority of staff are contact centre agents, who deal with customers over the telephone. Due to the seasonal nature of call volumes, about a third of the workforce are on fixed-term contracts for up to ten months, and there are some opportunities to continue working on a permanent contract. The age of the workforce ranges from 17 to 74. UK 07 Call centre aims to increase the share of the mature workforce further but finds this challenging as call centres are still being perceived as work places for predominantly younger people. Call centre work in general has a poor reputation and this is something the company is trying to address by offering career development opportunities. Labour turnover figures have been improving over the years, not least because of UK 07 Call centre's retention measures.

The UK 07 Call centre has for many years embraced initiatives which encourage an age diverse workforce and has won a number of awards, most recently the American Association of Retired Persons (AARP) International Innovative Employer Award. The company aims to attract workers at both ends of the age spectrum through targeted advertising and aims to retain them by offering career development opportunities, flexible working and by being responsive to requests for changes in working hours or extending working lives. The initiatives have been driven forward by human resources and supported by senior management who recognizes the benefits this brings to the business.

1. Organisational background

UK 07 is the UK's largest provider of warranty services for a wide range of consumer electronics, domestic electrical products and gas central heating systems. Working with its trade partners in manufacturing and retail, the company provides warranty protection and repair plans for over 7 million appliances for 4.9 million customers in the UK (UK 07 2010). In addition, the company provides telephony and mailing services to third parties, including a commercial TV channel. As well as in the UK, the company operates in nine other EU countries and in Australia, where the company was founded nearly a century ago. The UK still generates most of company's turnover, with sales figures in the UK totaling £349m compared to £448m worldwide. The UK07 call centre employs a total of 2.225 staff (average figures for 2010, p.48), representing an increase of 4.5% compared to last year. UK07's Head Office is in Greater London and the other four establishments, including two call centers, are located in the Midlands and the south of England.

Criteria	Parameter value
Size (no. of employees)	Large (around 900)
Sector	Service, Private
Work council	Yes

The UK07 call centre is located in a refurbished building in the city centre. It currently employs around 900 people, having recruited an extra 265 people since the summer to meet the annual seasonal increase in call volumes due to the purchase of electrical products around Christmas time. The majority of staff at UK07 call centre are call centre agents, who take calls and deal with customers. In addition, the site employs some team leaders, a small group of managers, two operations managers and one site operations manager. Around a third of employees work on a fixed-time contract for up to 10 months to meet the seasonal demand, but there are some opportunities to continue working on a permanent contract.

The company employs women and men in nearly equal proportions. Around 8 % of the workforce are aged 50 plus (46: aged 50-59; 16: aged 60-64, 3 age 65 plus), with the ages of employees ranging from 17 to 74. The company aims at increasing the share of its 50 plus workforce to 10% but finds that stereotypical views of call centres as places for younger people to work hampers its efforts. The labour turnover for permanent staff of around 16 to 20% is below the industry standard for call centres and was said to improve year on year.

Key challenges: According to the 2010 Annual Report, the company aims to grow its UK business organically while maintaining high levels of customer satisfaction. Against the background of a weak economic recovery and weakening sales of domestic electrical goods the company achieved a two digit growth in UK sales figures through a number of strategic initiatives, such improved customer data, improved sales and marketing processes targeting new business through direct marketing and measures aimed at increasing customer satisfaction and retention (UK07 2010a and b). The company aims to expand its international business further, having achieved substantial growth in Germany, Spain and Australia during the last year. International growth in sales stayed below UK figures and the company's expectation due to the recession but equally reached a two digit increase.

The social dialogue: UK07 call centre informs and consults its workforce on key financial and economic issues that affect the performance of the business and other issues that may be of concern to employees through elected representatives of staff and management from each site. At Group level the works council meets at least biannually with the Group's Chief Executive and the HR director. At local level, the works council, called TEAM (Together Everyone Achieves More), meets on a monthly basis with the site operations manager and the HR manager to talk about a wide range of issues that affect the business following a mutually agreed agenda. The communication was described as a two-way process, resulting in a 'very positive' relationship.

2. Age management approach

Having opened in 1997, UK07 Call centre has long since embraced initiatives which encourage an age diverse workforce. This has been driven forward by human resources and supported by senior management who recognizes the benefits this brings to the business.

Since having become an 'Age Positive' employer, UK07 Call centre has won the Age Positive Regional Newspaper Award a number of times and more recently the AARP International Innovative Employer Award in recognition of the UK07 Call centre's age diversity focus (2008 and 2009).

UK07 Call centre aims to attract workers at both ends of the age spectrum through targeted advertising and aims to retain them by offering career development opportunities, flexible working and by being responsive to requests for changes in working hours or extending working lives. This is being underpinned by an equal opportunities policy which explicitly includes age. Regular health promotion events aim to raise health awareness and increase physical activity levels among the entire workforce.

This overall approach to workforce management will continue into the future. This also means that, as part of its age diverse strategy, the company will continue to attract and retain mature workers. How this remains to be achieved best will be decided following a review of the 2010 recruitment and training activities and outcomes.

3. The original measure

Short vignettes or descriptions of the age diversity strategy at the UK07 Call centre have featured in various publications over the years. For example, the *Workforce Management: Age Positive Guide*, published by the Department for Work and Pensions (DWP) in 2007, details how the company monitors and enforces its age positive approach. Measures included aiming for a composition of the workforce which closely reflects that of the local population; briefing external recruitment agencies about the company's age diverse strategy; monitoring the demographics of applicants (including age); gathering feedback from applicants and leavers to help the company achieve its age positive approach; and providing this information to managers on a regular basis (DWP 2007a).

The DWP publication also features UK07 Call centre's business benefits of employing an age diverse workforce. It was reported that older employees help to improve customer service as they have experienced breakdowns of appliances themselves, are 'very keen to learn', and can offer valued coaching to younger staff (DWP, 2007a). Moreover, benefits include lower recruitment costs (reduction by 50 per cent) (DWP, 2007 b), lower levels of absenteeism as a result of employing an older workforce (DWP, 2007a) and lower turnover rates (the 'six-month leaver rate for workers aged over 45 was at least 10 per cent below that for younger employees) (DWP, 2007c).

4. Development of the initial measure and current practice

Overview: Current policies

Criteria	Parameter value
Status of initiative	Continuation
Target groups	All
Type of measure	<ul style="list-style-type: none"> - Job-recruitment - Changing attitudes - Lifelong learning - Career development and mobility - Flexible working - Health promotion - Redeployment and retention - Exit and transition to retirement
Scope of measure	Overarching

Recruitment: UK07 Call centre actively seeks to recruit people at both ends of the age spectrum through targeted initiatives, including for example activities targeting school leavers. Having moved away from the traditional newspaper recruitment about three years ago, UK07 Call centre deploys different recruitment strategies which aim to appeal to a variety of groups. Strategies include advertisements on public transport (inside and outside trams or buses featuring young and mature people), advertisements on the radio (selecting radio stations with a predominantly younger or older audience) or the ‘recommend a friend scheme’. Furthermore, age ambassadors (younger and older employees) appear in the press or come along to recruitment fairs to give people an insight into their work at the call centre and what they enjoy about working for the company.

“We try to do as much PR as possible in terms of getting good news stories out there to show that anybody could join us at any age and have a successful career with us,” explains the HR manager, and this resulted in ‘some excellent coverage’ in terms of employing older workers. For example, press articles have featured UK07 Call centre employees from one family spanning three generations or mature staff talking about their work experience, with some older workers commenting that working with younger workers keeps them young.

UK07 Call centre has also embarked on a collaboration with new partner organisations, typically attracting people who return to work having taken time out for (child) care or unemployed people who embark on a career change following redundancy. “We found that a number of their clients are over 40 which is great to us because we can tap into that market and we are quite successful with them“, explains the HR manager. The clients at the two partner organisations effectively undergo a bespoke pre-employment training course which prepares them for the type of work offered at the call centre. The programme at Working Links, a unique (public-private-voluntary) organisation which tackles social inclusion nationwide by helping disadvantaged people such as the long-term unemployed, lone parents or older workers into sustainable employment, lasts one or two weeks and the programme at the local college six weeks. Training includes, for example, key board skills, IT

skills or confidence building, also with regard to picking up new skills. The close collaboration between UK07 Call centre and the partner organisations ensures that the partners fully understand the business and that the training programme meets the company's skill needs. The clients of these partner organisations still undergo the company's selection process and, when successful, embark on the classroom based induction training for all new joiners. In total UK07 Call centre recruited 30 people over the summer period through this route (three cohorts of ten people). Despite it being a bespoke service, it is free of charge to UK07 Call centre. It remains to be seen whether and how changes in government funded training affect this service. A review of all recruitment activities will take place over the next few weeks during the quieter business period, which will inform the company's recruitment strategies for the next year.

The age of job applicants will only become fully apparent when candidates have progressed through the selection process to the half-day assessment centre. The date of birth is recorded on the equal opportunities monitoring form, which is then separated from the job application form before the selection process begins. If successful, applicants progress to a telephone interview, where they are being asked to elaborate on their competencies, with UK07 Call centre looking for candidates who can demonstrate good customer service skills and who have a sales background in any area. At the assessment centre stage successful candidates undergo a range of tests, including sales ability and basic literature and numeracy. They also have the opportunity to meet UK07 Call centre staff in their working environment and ask questions, helping them to decide whether this is the right job for them. Having passed the assessment centre, candidates complete the selection process by taking part in a one to one interview.

Successful candidates will be offered a job that aims to match their number of requested hours with the call centre's demand. Joiners start with a classroom based induction programme where they learn more about the company, its products and services. At very busy times UK07 Call centre runs four induction programmes simultaneously for different departments, each with typically ten participants with access to a PC. Following the typically eight day induction, joiners move on to a working environment where they can call upon support from a facilitator (the so-called graduation bay or short grad bay). Once confident people join a team, usually a group of ten people.

Previously, UK07 Call centre piloted separate induction programmes for school leavers and mature people aged 45 plus as they were thought to have different learning styles and needs. The former applied 'bite-sized' training in practice and the latter were assessed for any skills gaps and additional support they required. Regular feedback showed, however, that neither group liked to be targeted in that way and much preferred being part of mixed age team. The experience also showed that mature people generally lacked specific skills which are now being developed in the pre-employment training course offered by Working Links. IT skills can be an area where mature people may be struggling but this wasn't the case this year, perhaps due to the pre-employment training. Overall, the current induction programme with mixed age groups and a period of supported working environment, as described above, was thought to be very successful.

Training and career development: Employees continue to receive training that is required for the job, such as sales training. The company also offers a personal development programme for contact centre agents that enables them to develop a career within the call centre. The so-called facilitator programme consists of nine modules, covering a range of basic skills in areas such as HR, IT and reporting. It is open to people of all ages. It is run by the learning and development team and leads to a recognized qualification. Having successfully completed this nine-week programme staff can become a facilitator in the graduation bay, and will have acquired the foundation to become team leader. While there are not that many opportunities to progress to a team leader position as there are few vacancies, contact centre agents can also move into support functions, such as HR, training and development, planning and performance or client services. All vacancies are advertised internally and there a number of examples where support functions have been able to recruit an internal call centre agent.

The pay structure applies to everyone irrespective of age, with call centre agents receiving an hourly rate and a commission fee.

Flexible working: Everyone at UK07 Call centre could ask to work flexibly, and the company does get a number of these requests. The planning and performance team assesses whether this is in line with business needs or else whether the company can accommodate the requested working pattern in a different department as call volumes vary across departments. Most departments at the UK07 Call centre operate from 8 am to 8 pm seven days a week, with one department opening until 11 pm. This gives the company the flexibility to match the requested shift pattern to call volumes. Staff work pre-arranged alternating days to cover the seven day working week. UK07 Call centre also offers fixed shift patterns to accommodate caring responsibilities or evening (7 pm to 11 pm) and weekend shifts, which also suit some people with caring responsibilities.

Recently two members of the training team requested a change in working hours due to health issues and the birth of the grandchild respectively. Having looked at the requirements UK07 Call centre was able to offer both employees reduced hours, with both now working four days per week instead of five previously. This is not only a positive outcome for the employees but also for UK07 Call centre as it retains valued skills within the team and keeps employees engaged.

Health promotion: Once a month UK07 Call centre runs an event called 'Wellness Wednesday' to raise general health awareness and to promote a healthier lifestyle by engaging people in physical activities on the day or offering a local gym promotion. The events vary each month and have included a pedometer challenge measuring the number of steps on the day or a Nintendo Wii sports game. Staff can gain additional points when they continue these activities during their breaks and prizes can be won for the team, the individual or the floor. Alternatively, employees can engage in activities which train the brain (crossword or Soduko) or read up on health information. The activities are chosen carefully so that everyone can be included. The events were considered 'a real success' and get 'lots of people' engaged. In addition, the company provides fresh chilled water and has food delivered every Monday.

Retirement: Staff can continue to work beyond the age of 65. There are no processes in terms of retiring people, it is entirely the individual's choice. The oldest employee is 74.

Facilitating factors and benefits: Having a mature customer profile, UK07 Call centre finds it 'very positive' to have 'a balanced workforce'. Senior management recognizes the benefits of an age diverse workforce and understands the importance of having diversity within teams.

Older workers are a valued part of the workforce. They were found to provide an 'exceptional customer service' as they can empathize with customers, having experienced a breakdown of appliances themselves. Moreover, younger people can learn from more mature staff not only what good customer service is but also in terms of their work ethic as mature people generally have good timekeeping and good attendance. The 'skills and talent of the mature people is quite critical' for the business and retaining mature staff helps to reduce recruitment costs substantially. Mature workers were also valued for their loyalty.

Regular feedback from employees informs the company's fine-tuning of their age-diversity strategy. Having held separate induction programmes for mature and younger workers over a period of two years, there are now mixed age groups having taken on board comments from participants, with the new approach reported to be working well.

5. Concluding reflections from the researcher

Age-diversity is clearly an approach that supports age management - a term that is not widely used in the UK. UK07 Call centre recruits and retains older workers as part of its age diversity strategy - and will continue to do so in future - as senior management recognizes the business benefits of an age diverse workforce. UK07 Call centre adopted novel recruitment strategies to attract older (and younger) workers and, following regular reviews based on experience and feedback from employees, ensures these remain successful and free from any age bias. The company is keen to promote the message that people can join the organization at any age and build a career by moving upwards (facilitator and team manager) or sideways into support functions. UK07 Call centre also offers opportunities for flexible working at the point of joining the organization or by accommodating requests for changes in working hours in line with business needs. Flexible working can be considered as an important part of an age management strategy as it allows for an adjustment of the work-life balance due to health-related issues, caring responsibilities or for other reasons.

Interviewee: HR Director

CASE 8: UK08 - RETAIL

Type of measure: Job recruitment; Training, lifelong learning and knowledge transfer, Career development and mobility management; Flexible working practices, Redeployment and retention

Executive summary

UK08 Retail is a specialist lingerie and swimwear company with a head office in the Midlands and 20 retail stores in the UK. It also sells through a mail order catalogue and the internet. Established in 1995, it now employs about 750 people, 95% of whom are women.

A young, dynamic company which has grown fast, UK08 Retail has also won national awards including the *Sunday Times* newspaper's Best Companies to Work for Award for some years as well as various fashion/retail sector awards. It focuses on personal service and all employees are trained in fitting its products, with training managed and delivered in house. There is no explicit age management policy: individual career development and individual problems such as any associated with disability or reduced capability are dealt with on a one-to-one basis. The workforce profile means that at any moment up to 20% of store managers may be on maternity leave or about to take leave. This fluidity is balanced by a variety of flexible work patterns.

There are many staff incentives and surveys show that employees' job satisfaction is high. Retention rates of about 18% exceed those of 10-11% in retail generally. The target client group has been in the 18-45 years range but some of these customers are now moving into an older age bracket. Similarly, the employee profile is moving upward because existing staff tend to stay with the company.

1. Organisational background

UK08 Retail is a limited company and was set up in London in 1995. It retails women's lingerie and swimwear through mail order, internet sales and 20 shops throughout the UK. In autumn 2010, of 726 employees, 59% worked in retail stores, 7% in customer services, 13% in head office and 21% in the warehouse.

In 2001 the expanding company needed new accommodation and it relocated to a warehouse and head office a mile or two apart in a Midlands town, where business costs are lower than in London but transport links are very good. It now has a turnover of £50 million.

About 95% of employees are women, reflecting the products sold and the service offered. The age profile of the workforce in 2010 was:

Age	Under 21	21-25	26-34	35-44	45-54	55-64	65 or above	Total
Number	135	206	176	103	83	23	0	726
%	18.6%	28.4%	24.2%	14.2%	11.4%	3.2%	0.0%	100%

Source: Company's HR Department. Figures for year to November 2010

The company's target customer base has been aged 18-45 but customer loyalty means that this is gradually moving into older age groups. Similarly, a retention rate of around 18% and high staff satisfaction means that there will be increasing numbers of more mature employees. In 2011 UK08 Retail will recognise 25 people who have worked for the company for 10 years.

The gender and age profile of the workforce means that, at any time, up to 20% of shops may have a manager on maternity leave or about to take leave. The company is therefore accustomed to such fluidity and offers different types of flexible working to all employees. This includes 4 day weeks, 9 day fortnights, job shares, and the offer to buy extra holiday up to 5 days annually.

About 20% of employees are 'zero hours' workers, and they are included in the figures above. This gives flexibility especially as these employees have tended to stay with the company: they may be actors or sportswomen, mothers of young children, or students who are engaged when they start university and may work at their home address in vacations or at their university location during term time. For some people the variability is welcome: someone may work +regularly for 4 or 6 days weekly, then not work for some time if they have other commitments. Zero hours contracts are not usually appealing to workers but the company's ethos and approach to HR has enabled it to sustain this necessary pool of employees.

Academic and professional qualifications and expertise are required for some posts in for instance administration and product development, but for most posts the company looks for relevant skills and experience, and the potential to develop in the job.

With a specialist product range, UK08 Retail stresses personal service greater than that offered by high street department stores. All employees are trained in fitting underwear and swimwear and all training is done within the organisation.

2. Age Management Approach

To date the company has adopted a benign, flexible, 'person-centred' approach to human resources. With a relatively young workforce, it has not been obliged to consider the needs of older employees as such, but staff recruitment and retention have been priorities. However the structure of the workforce may be changing and this may call for more specific attention, as in the new long service awards for 10 years with the company. It seems likely, given the company's record so far, that any such rethinking would be embedded within the successful overall HR approach.

Recruitment: The company has invested heavily in the recruitment process. It resists using agencies, preferring applicants who respond to an advertisement: a letter is always requested with the application form, to give insight into the applicant's views beyond the CV. Job applicants are often existing customers and the HR Director felt that it was important to let the person say why she wanted to work for this company: 'It has to come from the heart'. Shortlisted candidates are brought together for a day for not just a one-to-one interview, but also to participate in group and individual activities including giving a presentation and doing some analysis of the type of information likely to be encountered in the role: the recruitment process is honed near to the day according to the post in question. It can involve line managers, colleagues and HR staff who co-ordinate group sessions. At lunchtime the group of 6-8 applicants is reduced to 2-3 for more focused individual interviews. All applicants are offered feedback if they want it after the appointment has been made. Because the process is structured with assessments made in different areas, this can be very helpful, and the HR Director commented that unsuccessful candidates often write to thank the company for the feedback they are given.

Such investment in the recruitment process has enabled the company to ensure that it appoints people who are capable of the role and who really want to work there. This style of managing the workforce is not age-related, but it is evident that the attention given to employing staff will allow older people to show what they can do. The HR Director cited one Midlands store where about 20% of staff were aged 40-50 which balanced the younger staff well: younger people brought enthusiasm, while more mature women had good sense and commitment/loyalty. The care given to recruiting is likely also to be a factor in the healthy staff retention rate.

The company has only faced recruitment difficulties in specialist areas of product design. The HR Director thought that current organisational challenges centre on the need to comply with legislation which was changing at such a fast pace that administrative needs might mean that there would not be enough 'people time'. Ensuring that management is in touch with employees has been a key aim: 'We try to make the environment and workplace as good as possible to retain staff.' Pressure associated with compliance with changing legislation was a concern because the ability to engage with individuals is one of the company's core values. Formally, one-to-one monthly review meetings take place for warehouse and retail staff, and a quarterly meeting for full-time staff as well as an end-of-year review (financial year).

There is no union representation but there is a staff committee and every shop or head office department/warehouse section has an 'Employee Champion', about 35 people in total. They meet at least twice yearly in March and October and are involved in the Best Company Engagement Survey. These people are not elected but may put themselves forward or may have been suggested by a manager. They have to be responsive, vocal, and confident to convey the views of staff to the consultative group and to feed back discussion to workers in local stores or departments.

Training: Training within the company is offered to all. This includes compliance with eg health and safety, VDU, manual handling and so on, e-learning in the stores (where the local

manager supports any employee who needs help) as well as the more specialized fitting training. Store managers have central training, as do 'employee champions' and 'stock champions'. Each employee has a personal growth plan. Job vacancies are first advertised internally and people who apply are considered even if they do not at that time have all the experience required for the role. The aim is to provide learning and development opportunities for anyone who wishes to further their career and this applies to employees of any age.

3. Current practice and how it has evolved

This growing company has not needed to plan pre-retirement programmes; there has been no counselling on this, no retirement gifts or company pension scheme, though the HR Director thought that this was likely to come on to the agenda. Instead the focus has been on a personalised approach: 'People are people, no matter what age'. However support for employees of any age is available from the Employee Assistance Programme of the Retail Trust.

The Retail Trust (www.retailtrust.org.uk) is a charity originating from 1832 which caters for people who work or have previously worked in the retail sector. UK08 Retail makes a company donation to the Trust and its services are then available to employees. The company values this, not just because this is a charity, but also because the services given are independent and confidential: the company is told how many employees have contacted the charity but does not know any details of particular cases. The Retail Trust provides free counselling sessions, legal advice, career development and coaching, and makes donations to support both young and old in difficult circumstances. It also helps with training, through some scholarships (eg for senior managers to do courses at the Said Business School in Oxford) and financial support through hardship funds for students who work in the retail sector. This 'outsourcing' of support to the Retail Trust means employees have a resource which is detached from relationships within the company. The services available would cover most areas of concern for an older employee, just as for a younger one or for someone with a health problem or disability.

Salaries do not feature bonuses: 'It's a meritocracy'. There is a starting salary range, then, once competent, a different salary range. Later there is the chance to develop as, for instance, a supervisor. What matters is the ability to do the job, not age *per se* nor length of service.

Incentives: One feature of the environment at UK08 Retail is that employees have incentives on the principle of gifts given 'a little and often'. At Christmas staff receive a £30 'Santa' high street gift voucher and £20 per person is donated to a Christmas event. A regular feature is that the 'biggest week' store has a bottle of champagne. Each retail employee receives a £20 birthday gift, and barbecues are organised for warehouse staff. A store which gains 100% from the 'Mystery Shopper' is given a box of sweets. Previous gifts to individual employees have been in the form of a hamper: the company has tried to vary these marks of recognition so that they are not always monetary.

Two substantial incentives operate. 'Living the Dream' asks employees what they would like to do: three ideas are shortlisted and voted for, with the winner receiving £2,000. Proposals have mostly been altruistic, often ideas to help people who are disabled or disadvantaged. To vary the format, the new 'Granting a Wish' scheme gives up to £500 to two employees, the aim being to allow them to think of themselves, as in the case of someone who said that she always spent any money available on her grandchildren and had not been able to tackle jobs in her garden, so would like some help to deal with that.

Recognition of five years' service brings a letter from the Chief Executive with £100 towards a meal out. In 2011 there will be 25 employees with 10 years' service (reflecting the relocation from London in 2001). An innovation for 2011 will be to offer these people two months of sabbatical leave.

The company's familiarity with maternity leave and its flexible approach to this means that employees who are not parents are able to raise a request for flexible working without feeling awkward. Non-parents do not have the same entitlement but any request is addressed in the same spirit.

Redeployment was seen in terms of possible disability rather than age-related. The warehouse, for instance, was said to be 'very target-driven', but if someone was not meeting their targets, this would be discussed and adjustments could be made, as in the case of a worker with MS, whose workload had been reduced: 'It's all person-related'.

One-to-one monthly review meetings take place for warehouse and retail staff, and a quarterly meeting for full-time staff as well as an end-of-year review (financial year). Ensuring that management is in touch with employees and that they enjoy working for the company is a key concern: 'We try to make the environment and workplace as good as possible to retain staff.'

The range of measures outlined above show how this company has been able to maximize employee satisfaction, without union representation. The approach and initiatives outlined are open to staff of all ages.

4. Concluding reflections

This dynamic company has grown since 1995 with a youthful workforce and customer base, targeting those aged under 45. Its future development will depend partly on how it adapts to a more mature customer base and employee profile: its staff retention rate is noticeably better than most retail organisations and it has strong customer loyalty. Its success has been recognized in national awards as well as being evident in business growth. Several elements have helped its development:

- it operates in a niche market and provides a personal service beyond what is available in department stores; this puts a premium on the customer service skills and training of retail employees
- as well as the shops, it sells through a mail order catalogue and on-line
- the flexible HR approach is influenced by a high level of maternity leave

- there is careful attention to detail and investment in the recruitment process
- it provides a good working environment with surveys recording high job satisfaction among staff
- it uses many zero hours workers but has been able to retain these people
- there is a 'person-centred' view of employees' concerns
- there is a range of small scale and more substantial incentives for workers
- in-house training is provided
- personal development and career progression is nurtured within the company by encouraging staff to take on new roles even if they do not initially have all the skills required in the job specification; they are encouraged to grow into the role.

There has been no explicit focus on age management. Instead, the attention to individuals and to human resource approaches which can respond to employees' needs and provide opportunities for personal and professional development has helped the company. Using the Retail Trust provides a support for employees who may need specialist advice or who may want to access independent advice which does not involve line managers or the HR department.

Like many other UK firms, 'age management' has not to date been an explicit part of this company's thinking. It is at an interesting junction in terms of its client and employee profile. So far it has very effectively addressed strategic and employee needs through a values-based, personalised approach to HR which encompasses age alongside health, disability or other features. The introduction of 10 year long service awards shows that the company recognizes that a more mature workforce could bring other issues to the fore.

Interviewee: HR Director

CASE 9: CALICO HOUSING

Type of measure: Awareness raising, changing attitudes and diversity: Training, lifelong learning and knowledge transfer: Career development and mobility management; Flexible working practices; Health protection and promotion and workplace design

Executive summary

Calico Housing Limited, a housing association located in North-West England, was established in 2000 to provide social housing: it owns and manages about 4,500 properties. Calico Enterprise Limited, its subsidiary, is a registered charity undertaking a range of activities including housing related support, information and help for the unemployed. Of the 340 employees in 2010, about 60 were on a government-funded scheme for the unemployed. One third of Calico's properties are sheltered accommodation for older people. A quarter of employees are aged 50 or above. The organisation has a good retention rate and has since 2009 been recognised in the *Sunday Times* list of '100 Best Companies to Work for'.

Key challenges in 2010 were likely reductions in public spending, the pressure to deliver and to meet regulatory standards, and the demands of IT provision. One third of staff belong to a trade union, but this is not a very powerful force within the organisation. All staff are represented by a Staff Panel and there is a high commitment to staff satisfaction.

When Calico was set up, most staff had been local authority employees, and many HR principles and practices were absorbed from the public services into the new organisation, including access to the local authority pension scheme. There is no age management policy as such; the concerns of older employees are addressed in terms of the individual, just like those of younger employees. However certain practices operate which may especially affect older workers, including the option of part-time retirement, reduction of hours pre-retirement, a pre-retirement course for those approaching retirement, flexibility in varying the workload of older workers, procedures to promote internal job mobility, and reallocation to another position to suit an employee's changing capability. In addition, concern about elder care responsibilities are now being raised.

1. Organisational background

Calico Housing Ltd is a housing association established in 2000 in Burnley, Lancashire in North West England. It is a registered social landlord and owns and manages about 4,500 properties providing affordable homes in the area around Burnley. Calico Enterprise Ltd, a registered charity established in 2007, is a subsidiary of Calico Homes which provides apprenticeships, job opportunities, and support for local people. Calico Enterprise Ltd has been the focal point for growth but the two organisations operate with a shared vision (www.calico.org.uk). Calico Homes is run by a Board of 12 people including tenants, local

authority nominees and volunteers. Calico Enterprises is run by a Board of seven volunteers. We focus below on Calico Housing but the two organisations work very closely.

The Home Support service helps older and vulnerable people to lead independent lives in their Calico-owned property. About one third of the properties are sheltered accommodation for older people. A self-help pack is available and a telephone advice line supports tenants in personal financial management, with up-date in its magazine 'Bolt'. The Burnley area has high unemployment and low income levels; it is by some measures one of the poorest towns in the country. One in ten Burnley residents is from a non-white ethnic background. Calico is one of the biggest local employers.

Calico Housing was first recognised in the *Sunday Times* 100 Best Companies to Work for in 2009, ranked 28th, and in 2010 was ranked 15th. In 2009 the Audit Commission reported very positively on the organisation; it has been highly regarded by the government agency, the Tenant Services Authority (TSA) and was one of its national Local Standards Pilots. In 2010 the TSA's annual assessment of its financial viability resulted in the highest grade being given.

In 2010 there were 339 employees, 220 in Calico Housing and the rest in Calico Enterprise Ltd. 60 of these were on government funded schemes (Future Jobs) but were not included in surveys because they were working there for 6 months as a step to finding a job elsewhere. (The Future Jobs Scheme was cut by the new UK government in late 2010.) In summary:

Criteria	Parameters
Size (number of employees)	Small/Medium 339 (in total)
Sector	Housing
Trade Union	Unions: Unison, UCATT, UNITE, GMB, AMICUS. Also staff consultative group

Turnover for Calico Housing and Calico Enterprise together was in 2008-2009 £16.5m. and in 2009-2010 was £18.7 m.

Workforce: Calico Housing's workforce was 49% male and 51% female (Communication with HR Department, December 2010). In mid 2010 women dominated the Senior Management Team (10 of 11 named people on Calico's web site). 25% of employees were aged 50 or above. The age profile was:

Under 25	25-34	35-54	55-64	64-
5.5%	23.4%	58.7%	10.9%	1.5%

Regarding qualifications, the HR Manager observed that the company was 'not very qualifications driven'. Employees in professional posts such as accountants, surveyors, housing professionals, had appropriate specialist qualifications. Calico employs many trades people such as joiners and plumbers who maintain the properties but applicants are judged more on the experience they can offer than on formal qualifications.

'Blue collar' and 'white collar' elements reflect the staff who are in trades (largely men) and those in office jobs (largely women) and the gender split is almost 50/50. 16% of staff work part-time; 8% of these are aged over 50.

The labour turnover rate in 2009-2010 was 10.4%; of these, voluntary resignations were 4%. Calico's target turnover was 10%, and the company benchmarks itself against comparable organisations, and was pleased to have a good retention rate.

Labour supply was strong for the less qualified jobs and even recognised trades, where the company is 'well over-subscribed; inundated with applicants'. However, for some technical posts or those requiring qualified accountants, surveyors or HR staff, it could be difficult: 'We struggle with the professional people. Perhaps because it's a provincial town'. The company suspected that senior housing staff were harder to attract perhaps because housing was associated with metropolitan areas and these people would prefer to work in cities. Calico is a smaller organisation than many municipal housing departments, but the HR Manager commented: 'At the same time, we have high expectations. Because we have a good reputation, we deliver and achieve'. The organisation has to be 'really creative' to attract these staff, including using specialist publications, networks and 'word of mouth'. But it was recognised that word of mouth was not a channel that supported equal opportunities.

The workforce includes 5.2% employees from a black or ethnic minority background. There are none in the older age groups and the HR department has identified this as an issue to address, taking account of the composition of the local population. It was recognised that this is a complex area likely to have cultural/linguistic and/or historic explanations eg first generation women immigrants (and also some in younger age groups) who are now in older age cohorts might not have worked outside the home. This will inevitably have affected the total number of workers from a minority background who are active in the local workforce and therefore the numbers of such workers aged 50 or more who are available for work.

Key challenges: Key organisational challenges centred in late 2010 on the new UK government's Comprehensive Spending Review and expected reductions in public spending. Calico relied on contracts which were funded by local government to supply housing, and had already felt 'massive pressure to produce more for less for the survival of the organisation'.

The second pressure area involved standards of delivery, performance indicators, and regulation by the Housing Corporation and the Tenant Services Authority (TSA), with the constant need to deliver on target, and all activity being very performance-driven.

Thirdly, IT demands were also strong. The company uses many systems for different functions and has to be compliant on performance and also measurable. Each funder expects systems in place which will enable Calico to deliver and be measurable: often a new system must be bought so that the organisation's work can be monitored. It must be fit for purpose and when submitting a bid, they have to indicate what system will be used, so there is pressure to keep up in this area, with implications for staff training.

Social dialogue: 23% of staff belong to a trade union, mostly Unison, the public service trade union. Smaller numbers belong to a mix of organisations, including UNITE (Britain and Ireland's largest union, formed in 2007 by the merger of Amicus and the Transport and General Workers Union), the Union of Construction, Allied Trades and Technicians (UCATT) and the GMB, a general union with members in all types of workplace. The HR Manager observed that many original Calico employees were former local authority workers and the organisation had been growing during a period when union strength in the UK had been decreasing. Relations were said to be good, but relatively weak. Where they lacked union representatives on site, staff would be represented by a Union officer in Manchester, who might not know the organisation very well. There are no specific collective agreements aimed at older employees.

In practical terms, staff representation comes through the Staff Panel, a consultative body, legislatively required. The Chair was previously part of Calico's Independent Living Team. The Panel consists of people from all parts of the organisation and has some strength in that any HR policy or procedure has to go to the Staff Panel for approval.

Compared with consultative bodies in some organisations, this Staff Panel has quite a formal structure and procedure. The 12 members are staff representatives, union representatives, an HR person, and someone from the Senior Management Team. Usually a Director attends the meeting. The Chair, elected four years ago, has been happy to remain (though it might prove hard at present to find someone else prepared to take on the role). She herself had welcomed a move from the Neighbourhood Action Team to more office-based work.

The Panel meets every six weeks: a pre-meeting produces the agenda which is circulated to all staff two weeks prior to the Panel meeting. The representative of each area consults with colleagues to be able to convey their views. The meeting is usually about two and a half hours. At a post-meeting session, tasks scheduled before the next meeting are shared out among representatives. Later the minutes are posted on Calico's intranet for all staff.

The Panel organises an annual staff conference. This has been mandatory for all staff (about 340 people) but that is currently under review because not all employees have been comfortable with the format which includes a formal meal. The aim is to celebrate the organisation's successes and share information about the work of different departments.

The Panel is a channel in two ways. If a Staff Panel member is aware of an issue causing concern in any work area which may be contentious, part of the remit of their role is to tell a director. For anyone who is less confident, it can be raised as an agenda item, or it can be discussed with the Chair of the Staff Panel. The aim is to pick up on concerns before they get 'out of hand', to voice and deal with rumours or inaccurate information at an early stage before they become fixed. In the past four years there has been no need formally to involve any of the unions. The Panel cannot make decisions, but it can persuade and influence, helping shape how policy and practice develops.

In the current economic climate staff concerns have to do with job security and the Staff Panel is an important route for information about this. The Chair pointed to another preoccupation: a imminent peer review exercise, which takes place each two and affects all staff. However many people seemed to have little interest in this so the Staff Panel would want to encourage better engagement with this process.

At present a key concern for the Chair is that the organisation's 'family-friendly' policies, revised each three years, cover eg emergency, maternity, adoption situations. These have already been brought together under one umbrella policy. However elder care responsibilities are not yet recognised formally, and she intends that the Staff Panel should ensure that this is specifically addressed alongside existing areas. She gave the example of an employee coping with not only young people still living at home but also with an elderly relative seriously ill in hospital and another relative with dementia for whom the employee is the first line carer. In some cases, working from home for certain periods can be personally negotiated by the employee, but this depends on the line of work, so the issue needs addressing directly so as to help shape the next phase of thinking. The Chair of the Staff Panel is keen to articulate the need for elder care alongside the other components of the organisation's family-friendly policy.

2. Age management approach

Calico's response to ASPA's Work Package 1 survey indicated seven policy areas:

- Part-time retirement opportunities
- Reduction of hours pre-retirement
- Special training schemes for older workers
- Decreasing workload for older workers
- Adaptation of workplace/machinery used ie ergonomics
- Promoting internal job mobility
- Reallocation to specific positions/redeployment to suit capability

These are discussed in the next section on current practice.

At the time of our first contact, Calico's web site reported growth and continuity despite the difficult economic situation. Though it was not clear what the effect of public sector spending cuts might be, the HR manager did not at that point envisage any major changes: 'We have a commitment to staff satisfaction'. She thought that nothing would be gained from a different approach and she felt that there was not the appetite for this in any case. Calico might rather choose other strategies such as 'streamlining' in other ways rather than making big changes in its approach to staff.

The organisation was established in 2000, most staff 'came over' from local authority employment. In 2010, 21% of current staff had been in this group, with other people from outside local authorities being employed over time. However the local authority background was seen as 'a cultural thing', giving good terms and conditions of employment. Calico had 'a good starting point. Some organisations might see it as too generous, too supportive. But we've built on it.... What you put in you get back.' The HR Manager saw this as contributing to the organisation's success and felt that development opportunities for staff were possibly

better than in local government: 'It's a two-way thing, for the employee and the establishment'.

There is no formal age management approach as such; Calico's 'Single Equality Scheme' focuses on diversity in the workplace and in the community (but it does specifically mention age).

Previously, most employees retired at 65, some earlier by their own choice. The local authorities' '85 year rule' had applied, whereby if the person's age plus years of service reached 85 or more, they could retire. This no longer applies as one of the changes in the context of legislation over retirement age, but there is probably residual influence of the rule among older workers, likely to dissipate over time.

The pay system does not differentiate between a 16 year old and a 60 year old. The nature of the job determines the salary and there are just three pay grades, offering little disparity over a period of 10 years employment.

Regarding the esteem shown to older workers, the HR Officer felt that more mature employees were treated with total respect, but this was the case with everyone as the organisation sought to use their experience to benefit Calico and the individual as well. Older workers had the same training and development opportunities, and in the case of an employee aged 67 who had reduced to three days weekly, she had the same rights to training as everyone else.

Calico organises well-being events, some of which are available to only certain employees eg a scheme in which National Health Service staff come into the premises to do bone density testing. This requires a medical referral and is only available to people aged 40 or more, but this criterion comes from the NHS, not from the organisation itself.

The only policies or practices which could undermine attention to the needs of older workers centre on the recruitment of apprentices who are aged 16 to 24 or people taken on under the Future Jobs Scheme, through the Job Centre, aged 18 to 24. This scheme ends in March 2011. The HR Officer thought that it was unfortunate that apprenticeship schemes did not allow for older people who might have been made redundant at any stage in life because an organisation like Calico could benefit from the existing skills of such people especially if they had been given formal retraining.

Taking account of this, Calico set up its own programme called 'Get Your Job', open to tenants who have been unemployed for any period, with no time limit or age limit. Help is given in preparing a CV, with interview training, and through work experience of up to two weeks. This has justified its funding, though most who take up the offer have been aged 30 to 40 rather than over 50. Nevertheless, Calico is ready to support anyone regardless of age.

Even though this is a geographical area of great socio-economic disadvantage, the current economic situation had not by late 2010 exerted noticeable negative effects on older workers at Calico. Two people were made redundant in January 2011, chosen from a poll of four

possible employees. Five criteria for consultation are used in a potential redundancy case. Of these, the two who lost jobs were aged 29 years and 48 years, and one of those who stayed was aged 59 years: in this case the individual's experience and lack of sickness carried weight.

Looking ahead, current legislation on retirement means that the organisation must rewrite its retirement policy which previously said that people would retire at 65. However the HR Officer repeated that Calico would continue to recruit from all ages from people who could offer the right experience.

3. Current practice and how it has evolved

We heard how the local authority background was a strong influence on Calico when it was established. Though there is not a formal policy on age management, the HR approach encompasses practices which benefit older workers.

Criteria	Parameter value
Status of initiative	Continuing
Target groups	All employees
Type of measure	Part time retirement opportunities Reduction of hours pre-retirement Special training schemes for older workers Decreasing workload for older workers Adaptation of workplace/machinery used Promoting internal job mobility Reallocation to another position to suit capability
Scope of measure	Overarching

Part-time retirement opportunities: These are promoted because it can suit the individual but also because it enables skills to be passed on. In housing, two people had reduced to three days weekly before *and* after retirement, so their skills can be retained to some degree. Another person aged 67 is also on three days weekly and will in due time phase out but meanwhile the company continues to benefit from her skills. Asked whether this was termed 'handover' or 'work shadowing' or 'knowledge transfer', the HR Manager said it was not because it was not formally structured. This tends to happen on a case by case basis if an individual wants it. It is a way to ease succession but the principle is quite strong. Currently, only two people were doing this, because it was not often requested.

The organisation has also tested post-retirement options, currently with one former employee who provides casual work for periods of up to two weeks when needed, a solution which is preferable to booking temporary staff because she knows how the organisation operates.

Reduction of hours pre-retirement: In 2010, 50% of employees belonged to the Local Authority Pension Scheme and the assumption was that one worked to 65 and then retired. So some people were 'not ready' to consider a change to part-time hours. The Social Housing Pension Scheme had 5-10 members. Employees who did not belong to a pension scheme were less keen to retire. This 'cliff edge' retirement has been the norm perhaps

because of previous pension regulations where part-time work was disadvantageous. This is not a regular feature as few older employees have requested this but it would be considered in business terms and in terms of the employee's well being. A Neighbourhood Officer had recently moved to a three-day week and the HR Manager felt that the organisation was very flexible: 'We don't have rules. We are very procedure-driven but a lot has to do with working patterns... We allow managers to make decisions. That empowers them. It works.'

Special training schemes for older workers: A 1-2 day pre-retirement course is offered through the pension scheme, paid for by the employer. In the past, Calico would write to someone six months before their expected retirement date and tell them about these courses, which are organised by Lancashire County Council.

Decreasing workload for older workers: Here the organisation responded in terms of 'different' workload rather than 'decreasing' workload. Sometimes a change would be because of ill health or a specific condition, but not necessarily associated with older age. In some cases limitations were agreed, eg caretakers in their mid 60s who remain full time but do restricted duties relieving them of certain tasks which are physically difficult. Similarly, joiners have sometimes had their roles limited. In these areas, the way to make this successful is to share the work: one worker may for instance tile the walls, while another tiles the floors, rather than both doing everything if this makes it possible for one of them to operate more effectively.

Adaptation of workplace/machinery used ie ergonomics: The workplace and equipment used is monitored regularly with annual assessments to meet statutory obligations. Adjustments are made where necessary but this happens for all employees, not just those aged 50 or more.

Promoting internal job mobility: Calico's approach to internal mobility is that any vacant job is 'ring fenced' to allow for redeployment in the first instance. Capability is assessed and the employee wanting to move must meet 75% of the essential criteria for the vacant post. Training can then provide for the additional skills needed. If the post is not filled in this way, it is advertised internally and then externally. Jobs vary considerably from staff like the tenant support workers who go out to the properties and engage with tenants, to those with technical trades who maintain the premises, to call centre staff who deal with problems, to office and administrative staff. So a switch from one area to another cannot be guaranteed: it is a matter of capability. A trial period allows the individual and the organisation to be sure about whether this is the right move.

Reallocation to another position to suit capability: This happens mostly in the manual trades. One example was a joiner with back problems who might become a caretaker if less skilled or an office worker if suited to that role. 'The trades' are male-dominated, but it can also happen in Home Support, a community service for older tenants, where employees are mainly female.

Here the job can present challenges, not usually in lifting but it could be for instance in sustained periods of driving. Such difficulties were not widespread and when they arise,

people have to be willing to move from their existing position in order to continue working. Sometimes if the physical limit is too much, and the adaptation needed is too high, some prefer to leave. But if the willingness is there to adapt, someone can retrain with support for another role. This is a matter of individual choice.

Occasionally redeployment happens for other reasons: a Neighbourhood Manager due to retire in late 2010 decided to stay at work until spring 2011 and was allocated to a post involving developing further projects for this period. Again, this demonstrates a personalised approach to redeployment.

4. Concluding reflections from the researcher

As in some other UK cases, there is a strong principle of making opportunities available to all employees. The HR Officer interviewed felt that 'We can't have positive discrimination ethically and morally'. Calico's 'Single Equality Scheme', reviewed in 2008, notes that as a housing association it has a statutory duty to ensure equality for everyone who receives its services, and 'we also have a moral duty to respond to the wide social diversity within our community'. These values underpin the way in which the organisation works: alongside this, preferential treatment for employees in certain age groups would not fit with its ethos.

Calico has a supportive approach to managing the employment preferences of older workers on a case by case basis. This is underpinned by good employment practice absorbed from its local authority origins over ten years ago. Initially a non-profit-making organisation staffed by mainly ex-local authority staff, its HR approach imported many public sector principles, with good practice seen as key to staff satisfaction and the success of the organisation, so Calico was able during the buoyant years to build on this. Now recognised as one of the Housing Associations listed in the '100 Best Companies to work for', it has maintained its growth despite the economic downturn. There has been no age management policy but Calico's active Staff Panel is now addressing the need to recognise elder care responsibilities alongside the existing components of its family friendly policy.

Web sites

www.calicohomes.org.uk

www.audit-commission.gov.uk

References

Calico Corporate Plan 2010-2013 Executive Summary

Calico Housing Ltd: Company (registered in England registered number 3752752)

Registered charity number: 1125312

Calico Enterprise Limited: Company registered in England registered number 6329047)

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CASE 10: FALKIRK COUNCIL

Type of measure: Comprehensive

Executive summary

Falkirk Council is a major employer in the central region of Scotland, serving a growing population of around 152,000. About 70% of the Council's 8,100 employees are female and work either part-time or term-time. Just under 40% are aged 50 plus.

In a drive to become an employer of choice the Council introduced an increased range of flexible working options about ten years ago and a flexible retirement policy about five to six years ago, also recognising the implications of changing demographics. There are currently 15 employees in the flexible retirement scheme and around 180 employees in a range of roles who work beyond the age of 65 - an option that has only become available since the introduction of the flexible retirement policy. About ten years ago the Council also embarked on a government-led initiative on improving the general health of the workforce, resulting in a number of initiatives and benefitting everyone, including older workers. Following the introduction of these policies sickness levels had fallen substantially.

Having relevant policies in place to deal with an ageing workforce, such as capability procedures, redeployment policy and flexible retirement, the Council wants to review its policies over the next one or two years to ensure that they are fair and consistent. Support is available for managers to help them manage an ageing workforce.

1. Organisational background

Falkirk Council provides all local government services for a population of around 152,000, covering an area of 112 square miles in the central region of Scotland.

The Council is one the largest employers in the region, with more than 8,100 employees. Education and social work are among the two largest of five service areas. Education employs over 2,000 teachers and 30 educational workers and social work employs around 1,500 staff, with more than a third delivering domiciliary care.

The majority of the workforce is female (70%) and works reduced hours (57% work part-time and 17% term-time). Nearly six in ten workers are between the ages of 40 and 59, with 12% being aged 17 to 29, 19% aged 30 to 39, 30% aged 40 to 49 and 39% aged 50 plus.

The Council's budget for 2011/12 is £339 million and accommodates government-set savings of around £8.5 million.

Criteria	Parameter value
Size (no. of employees)	Large (8,100)
Sector	Local authority
Trade union	Yes

Key organisational challenges: The Council is currently reassessing its service provision as significant savings have to be made over the next three to four years due to the recession. At the time of interviewing the Council was looking at natural attrition and voluntary severance, yet this will need to be kept under review.

Social Dialogue: The Council holds regular meetings with the trade unions, the main ones being Unison, Unite, GMB, UCATT (Union of Construction, Allied Trades and Technicians), SSTA (Scottish Secondary Teachers' Association) and the Educational Institute of Scotland (EIS). Joint Consultative Committee meetings take place every six to eight weeks and currently include up-dates on the financial situation and redundancies. Unions have been consulted about the introduction of the Council's flexible retirement policy and any subsequent changes. The relationship with unions was described as 'strong and constructive'.

2. Age management approach

Falkirk Council feels well prepared for an ageing workforce, having age-neutral policies in place except flexible retirement which is by its very nature age-related. An equal opportunities policy has been in place for a long time (including the age dimension although it was not a category protected by law), and diversity training is provided for employees on an ongoing basis. It was asserted that older workers are met with esteem across the board, a proxy indicator being the fact that two percent of the workforce is currently working beyond the age of 65.

Falkirk Council promotes itself as an employer of choice and has over the years implemented a number of policies to this end. With the Council's Falkirk head office situated north west of Edinburgh and north east of Glasgow, respectively, the Council experiences competition from the two major cities. About ten years ago the Council introduced an extended range of flexible working options and about five to six years ago introduced its flexible retirement policy, recognising the demographic changes and its implications for workforce management. As a result, the Human Resources Manager asserts that "we are pretty strong on supporting people achieve their work-life balance". About ten years ago the Council also stepped up its efforts to support employees leading healthier lives following a government-led initiative. Probably due to a combination of all these policies sickness absence levels fell from a relatively high rate to below the Scottish average.

Looking ahead, the Human Resources Manager asserts that the Council has policies and measures in place to deal with an ageing workforce, such as capability procedures, redeployment policy and flexible retirement. Over the next one to two years these need to be reviewed to ensure that they are fair and consistent across the board. "We have always gone a step beyond the basic legislation levels. For us to keep ahead we have to ensure that

policies and procedures tie up”, explains the Human Resources Manager. At the same time, human resources needs to ensure that line and service managers are able to deal with any issues that may arise. The Council is currently reviewing their flexible retirement policies to take account of the imminent abolishment of the default retirement age. They anticipate that some managers may feel less comfortable with the new policy, however additional support will be available from human resources and occupational health, where relevant.

3. Current practice and how it has evolved

This section focuses on some of the relevant key policies in place.

Overview: Current practices and policies

Criteria	Parameter value
Status of initiative	Continuation
Target groups	All
Type of measure	<ul style="list-style-type: none"> - Flexible working - Health promotion - Redeployment and retention - Exit and transition to retirement
Scope of measure	Comprehensive

Job recruitment: Recruitment practices are age-neutral. There is no upper age limit on recruitment, and the age of job applicants, while recorded on the equal opportunities monitoring form, is not accessible to service managers selecting applicants. During the last 12 months the Council employed 445 new staff, of which nearly 11% were aged 50 to 59 and 3% aged 60 to 69.

Lifelong learning: Training needs are assessed independently of age: “If anybody needs training they get it irrespective of their age”, asserts the Human Resources Manager. Employees also have a personal development review, irrespective of age, where training needs will be discussed.

Flexible working: Having offered part-time work, job share and term time work for a long time the Council has introduced more flexible working options over the last ten years, primarily to help promote the Council as an the employer of choice, to retain staff and to offer staff opportunities to adjust their work-life balance. The Council has also recently embarked on a new internal marketing strategy, called FC4U (Falkirk Council for you), which aims to promote the policies and support available to employees, including flexible working. In principle these are open to everyone, although more suited to some areas of work than others. Some restrictions apply.

Options include compressed working hours (e.g. working contracted full-time hours over four instead of five days or working nine days a fortnight), annualised hours, voluntary reduced hours (reduction of hours of work over an agreed period of up to two years), home working or

flexi-time (varying working hours on occasions) and also working flexibly without being on a specific scheme if service needs are met. In addition there are flexible leave options, including carer's leave (up to five paid days for unforeseen emergencies), and two types of career break schemes, including a guaranteed return to work scheme for a period of up to two years. Currently 1.4% of employees use options such as voluntary reduced working hours, compressed working hours, career breaks and home working, 90% of them are women. Uptake was monitored but results were not formally evaluated. Informal feedback from services suggest that uptake did not impact negatively on services.

In one social work team practically every member of the team worked flexibly in a way that suited him or her. This was reported to have taken the stress out of work and the team manager was content with the productivity of staff.

It is recognised that more and more employees in the council area have adult caring responsibilities. Staff wanting to work flexibly would be supported, according to HR. Last year the Council organised a drop-in event for employees with caring responsibilities providing information on the support available in the council area and flexible working options.

Health promotion: Since 2003 Falkirk Council has stepped up its health promotion and safety at work activities by signing up to the Scottish Government's strategy aimed at improving the health of the workforce. Having registered in 2003 for the Scottish Health at Work (SHAW) award, the Council progressed from the Bronze to the Gold Award within three years, becoming one of the first recipients of the Gold Award in 2004. In 2007, the Council transferred to the new government-initiated Healthy Working Lives (HWL) scheme, achieving the Gold Award at the end of the same year and the Mental Health and Well-being Commendation Award in 2010. The latter is being championed as a good practice standard for promoting positive health and wellbeing at the workplace. The Gold Award requires a three year strategy and one year rolling action plan, demonstrating the Council's medium term commitment to health promotion. Initiatives have included discounts for sports and leisure activities; a personalised eight-week health and fitness programme; a free six-week weight management course; men's health clinics, providing access to specialist men's health nurses on site during special events; an external counselling service; a smoking cessation programme and a physiotherapy service. These services are aimed at improving the overall health of the workforce, benefitting everyone, including the older workforce. The health promotion work is delivered by the Health, Safety & Care Team, which was set up in 2001.

Redeployment and retention: The Council offers a redeployment programme on a case by case basis. Support is being provided by a redeployment co-ordinator who screens any vacancies for suitability before they are being publicised. When a match has been found training required for the new job will be supported within reason. A permanent relocation will be arranged when the probation period has met with success from the point of view of the person to be redeployed and the service area. Redeployment may be due to health issues but there are also examples of age-related issues, e.g. a manual worker being no longer suitable for a physically demanding job as he or she is getting older. The redeployment co-ordinator currently has a caseload of 20 to 30 on an ongoing basis.

Exit and transition to retirement: Introduced six years ago the flexible retirement policy offers the following options: early retirement, phased retirement (for all employees except teachers) or winding down (for teachers) with details determined by the respective pension scheme regulations; more flexible working arrangements; and opportunities to continue working beyond 65. Phased retirement allows for a reduction of working hours up to two years prior to retirement from the age of 55 onwards and teachers aged 56 can reduce their working hours up to four years before retirement working a minimum of half the full-time hours as part of the winding down scheme. Knowledge transfer from the current jobholder to the person who is going to take on the task will take place during the flexible retirement. There are currently 15 people in the flexible retirement scheme, including five teachers in the winding down scheme. A 'fair' number of teachers retire and then work on a supply basis with the Council. It was reported that retirement transitions are largely determined by individual choices, financial considerations and pension regulations, which may make phased retirement options appear unattractive due to the financial penalties involved. Some people, who are financially secure, will continue working as they enjoy social interaction.

There are currently around 180 people who continue working past the age of 65 in a wide range of roles, such as social care workers, teachers, school crossing patrols and cleaners, including over twenty people who are approaching the age of 70. Staff wanting to stay on must liaise with their manager three months before they turn 65. As far as HR is concerned this is business as usual as no issues have been raised in meetings with service departments about any performance or health related issues of employees aged 65 plus.

One day pre-retirement courses run every six months, providing employees with information about topics such as finances, health, volunteering and others.

4. Concluding reflections from the researcher

Falkirk Council has adopted what one could describe as a comprehensive approach to managing an ageing workforce. Policies, except the flexible retirement policy, are age neutral but flexible to deal with issues that may statistically arise more often among the older workforce, such as flexible working to balance work with adult caring responsibilities or other work life balance decisions and redeployment as a result of changing capabilities. Through its flexible retirement policy the Council has given older workers more choice by offering phased retirement on the one hand and extending working lives on the other hand. This case study largely draws on the HR perspective and the policy side.

References

<http://www.falkirk.gov.uk/home.aspx>

Interviewees

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