The Winston Churchill Memorial Trust of Australia

Report by Kathy Kelly

2005 Churchill Fellow

An investigation into “strategies for improving the management and retention of our ageing workforce, as a solution to accommodating the skills shortages in Australia”

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Signed: ___________________________  Dated: ___________________________
Executive Summary

Name: Kathy Kelly
Address: c/o Local Government Association of Queensland
         25 Evelyn Street
         Newstead  Qld  4006
Email: Kathy_Kelly@lgaq.asn.au
Telephone: 07 3000 2233
Countries travelled: US and UK
Period of travel: 23 September 2005 - 6 November 2005
Project Description: Research and investigating strategies for improving the management and retention of our ageing work force, as a solution to accommodating the skills shortages

Highlights (US)
Conference on Ageism: American Association for Retired Persons (AARP)
40+ Networking Club: Association assisting individuals looking for career diversification and assistance
University of Geo Washington: Strategies for training older workers/formal qualifications
40+ forum: Speed-jobbing concept/opportunities available
Washington Business Journal: Profiles of the over 50s who are leading industries (after their retirement)
Pepcoholdings: Utilities organisation award top ‘50 employer’ for the over 50s
Senior Community Service Employment Program: Not-for-profit organisations to assist individuals re-career and acquire flexible employment
Senior Employment Services

Specifically tailored for individual-assistance in getting into the work force, post retirement

Work Force Development Group

Network working with private organisations to identify and promote employment positions

Murdoch University (Australia)

Overseas assignments and joint projects

Starbucks Coffee

Employment strategies for employing over 50s.

**Highlights (UK)**

Rhymer Associates
Providing training for mature-age workers

Improvement Development Agency
Focus on strategies to promote mature age workers

Leadership Centre
Training and development for mature age workers

Local Government Association (UK)
Sister association peak body for local government councils

Investors in people
International Award for improvement management of people

TAEN Conference
Third Age Employment Network - promoting opportunities for mature age workers

Department of Works and Pensions
Strategies for retaining skills and knowledge within the work force

University of Bristol
Training and qualifications for mature age employees

University of Exeter
European project for mature-age workers

Edinburgh City Council
Strategies for the ageing work force

Perth & Kinross Council
Strategies for the ageing work force

St. Johns Trust
Employing mature-age workers

Employers Forum on Age
Strategies to engage mature-age workers

Investors in People (International)
Strategies for retaining workers.
**Recommendations for retaining our mature-age workers**

- HR strategies are revised to better reflect needs of mature-age workers
- Councils identify management of culture change as part of their corporate plan
- Review and establishment of Position Descriptions specifically for mature-age workers
- Improve training and development access, promoting career diversification
- Individual Career and Progression Plans
- Improve incentives to retain present work force
- Provide leadership opportunities for mature-age workers
- Engage mature age employees as coaches/mentors/support workers for younger employees
- Involve mature age workers as part of induction programs for new staff
- Loyalty cards be available
- Subsidies towards health/fitness/leisure membership clubs
- Involve experienced workers in establishing Corporate Plans
- Build on the experience of mature age workers
- Improve communication strategies between different generations
- Intergenerational training be made available
- Increase access to of flexible working hours, and working from home
- Improve consultation processes of mature age workers
- Cultural change and shift required within organisations to maximise and improve upon their greatest asset - their people.

**Implementation and Dissemination**

- The observations, meetings and interviews will be recorded in to a comprehensive report for submission to Winston Churchill Trust by December 2005
- Recommendations and article to be posted on to the Local Government website by January 2006
- Outcomes and recommendations to be presented to the North Queensland and South East Queensland Training Consultative Committees (representing over 35 councils)
- Recommendations and findings to be shared with Queensland University of Technology (for consideration of further research and investment to assisting Local Government Councils in the future)
- Outcomes and recommendations to be reported back to Minister for Local government at new Women in Local Government Steering Group
- Strategies and model to be prepared for dissemination to HR and Training Officers within councils by March 2006
- Responses and acknowledgement to be sent to all companies and individuals interviewed - with regular communications/networking to share innovations
- Discussion paper for the Local Government Skills Council and Enabling Queensland by June 2006
- Discussion paper for sister associations within Australia, to be present in March 2006.
The Local Government industry is forecasting that the increase in eligible retirees within the next five years will hinder the present delivery rate of council services. Council is the only industry that delivers a wide range of essential services to the whole of the community. It is my opinion that HR practices for managing our ageing workforce are inadequate and do nothing to provide solutions for the impending intergenerational communities that is now being experienced. This research enabled me to visit other organisations, higher education centers and government departments in a bid to observe what is being achieved overseas.

My sincere thanks to the Winston Churchill Trust for not only enabling me to undertake this research and travel so extensively, but also for having the confidence in me to undertake a professional project that, I believe will have HR implications for government and private industries in the future. I was honored to receive this award and at the outset, determined to maximise the value and investment of my time and the Trust’s investment. I do hope that you will agree, that the outcomes have been achieved!

My thanks to my employer, the Local Government Association of Queensland for fully supporting my application. Their support enabled me to undertake this project and reflects their commitment to continuous professional development for staff.

The Fellowship travel was undertaken between 24 September 2005 until 6 November 2005. I had originally planned to attend the annual American Association for Retired Persons (biggest driver in this field of work in US) Conference in New Orleans on 26 September, followed by site visits in Ohio and then on to Washington for a political overview of developments.

As a result of the Hurricane Katrina tragedy, the conference was cancelled. Rather than delay my plans and schedules, I re-arranged my visit to meet with a range of organisations in Washington as well as AARP. My goal was to visit and observe a range of strategies that are being promoted to retain corporate skills and knowledge.
My personal approach was for me personally (a) be exposed to a range challenges and situations during my visits - to see and experience my own responses (b) communicate with all levels of people at work and social events (c) undertake extensive travelling on a range of transport (plane, train, bus, car, trams) that would be physically and mentally demanding, and (d) find out how I adapt to changes. I believed that my professional research, as well as personal experiences would work well to what I believe HR strategies need to consider prior to policy being established!

**Travel Schedule**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>Monday, 26 September</td>
<td>Conference on Ageism (AARP) 40+ Network</td>
<td>Washington</td>
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<td></td>
<td>Senior Employment Network</td>
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<tr>
<td>Tuesday, 27 September</td>
<td>40+ Network forum</td>
<td>Washington</td>
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<td>Wednesday, 28 September</td>
<td>AARP</td>
<td>Central Office</td>
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<td>Thursday, 29 September</td>
<td>University of George Washington</td>
<td>University</td>
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<tr>
<td>Thurs 29 September</td>
<td>40+ Forum (working group)</td>
<td>O Street</td>
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<td>Monday, 3 October</td>
<td>Australian Embassy and University Library</td>
<td>Geo Washington</td>
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<td>Tuesday, 4 October</td>
<td>Washington Post</td>
<td>City</td>
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<tr>
<td>Wednesday, 5 - Thursday, 6 October</td>
<td>Travel to UK</td>
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<tr>
<td>Friday, 7 October</td>
<td>Employers Forum on Age</td>
<td>London</td>
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<td>Monday, 8 October</td>
<td>Rhymer consultants</td>
<td>London</td>
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<td>Tuesday, 9 October</td>
<td>Improvement and Development Agency</td>
<td>London</td>
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<td>Local Government Association of UK</td>
<td>London</td>
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<td>Wednesday, 12 October</td>
<td>Local Government Leadership Centre</td>
<td>London</td>
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<td>Investors in People</td>
<td>London</td>
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<td>Thursday, 13 October</td>
<td>TAEN Conference</td>
<td>London</td>
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<td>Friday, 14 October</td>
<td>Department of Works and Pensions</td>
<td>Sheffield</td>
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<td>Monday, 17 October</td>
<td>Knightstone Housing Association</td>
<td>W-s-m</td>
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<td>Tuesday, 18 October</td>
<td>University of Bristol</td>
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<td>Wednesday, 19 October</td>
<td>SWOOP - University of Exeter</td>
<td>Exeter</td>
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<td>Thursday, 20 October</td>
<td>Consultancy Services</td>
<td>London</td>
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<tr>
<td>Sunday, 23 October</td>
<td>Travel to Scotland</td>
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<td>Monday, 24 October</td>
<td>Perth &amp; Kinross Council</td>
<td>Perth</td>
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<tr>
<td>Tuesday, 25 October</td>
<td>Edinburgh City Council</td>
<td>Edinburgh</td>
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Total engagements during overseas trip
3   Universities
10  Government Agencies
3   Government Department
3   Local Government Councils
7   Private organisations
12  Individuals.

Our Ageing Work Force
People are busy - they have schedules, and I was required to fit in with those. Establishing initial contacts with organisations was demanding, frustrating and sometimes - a complete waste of time! Welcome to the real world of work - what we want to achieve and when we need to achieve is not always complemented or supported by the people we work for or with.

Increased demands on people and their organisations meant that my schedule involved the overlapping of times and meetings, extensive travelling and a range of receptions/meetings/conferences and interviews. This ranged from meetings in large Board rooms, to open offices, where facilities were severely limited.

In one case in the US, I was accompanied by a member of staff who had to literally ‘search’ for one of the individuals that I was due to meet. Mobility in the offices means that (in USA) you are mobile, and if the label on the front of the room has your name on it - grab it!

To ensure accuracy and value of all meetings I decided to undertake six steps for each interview/meeting:

(a) obvious pencil and one notebook - dedicated to this particular project
(b) photograph each individual being interviewed - so that in time to come and during memory lapses I could remember who I had spoken to
(c) Obligatory exchange of business cards, with email addresses - for future networking and correspondence
(d) Request corporate information, collate and post back to Australia (registered post) to lessen any penalty on travel weight - and less bulky to take around with me
(e) As soon as practicable type up my handwritten notes of key issues and information conveyed to me
(f) Responses thanking individuals and organisations for their time and support - and the commencement of a comprehensive database.
General findings

Issues and concerns

- People are living longer - and their health has greatly improved
- More women in the workforce, see careers as part of their future planning
- Differences of treatment between younger employees and mature age workers is evident
- Assumptions that younger ones have attitudes and do not have a work ethic
- Assumptions that older workers do have a use by date, and are not capable of working longer
- Training and development does not appear to be available to mature age workers
- Training and development is seen as investment in the younger employees
- Managers assume that individuals are working towards traditional retirement age
- Individuals do want to work longer, they want to maintain their standards of living
- Health premiums need to be paid by the employer (US)
- Employees see a range of reasons to work - other than salary
- Numerous aged employees have achieved multi-national companies after retirement (US)
- Retail industries now employing more mature age workers
- Employers recognise the value and experience of some of their workers
- Use of seniority to encourage and reward loyalty needs to be considered
- Leadership opportunities needs to be available to mature age workers
- Default age in UK as at October 2005 is 65, and anticipated to be 68 by 2008
- Under funded pension schemes will be one reason for individuals to reconsider the retirement plans
- Pre-retirement courses must be introduced
- Extra holidays could be used to encourage individuals to extend their employment
- National legislation expressly setting out particular circumstances in which age-based distinctions will be deemed in national law to be justified
- Denial or restriction of employment rights to workers above a particular age requires objective justification.
Specific benefits incentives for retaining services of mature-age workers

- Benefits for full-time workers to continue past their traditional retirement date
- A solution to the skills shortages being experienced at present
- Corporate knowledge and experience is greatest asset to retaining mature age workers
- If an organisation does not invest in their older workers - their competitors will!
- Work is a necessity of life - and has been traditional routine for too many years to give away
- A retiree becomes more dependant on the State for financial support and other services
- Incentives to be introduced to retain part-time work - particularly in the professional and technical fields
- Associate companies could engage ex-employees as consultants
- Employee discount schemes will be seen as an incentive
- Loyalty cards will support employees in their purchasing power
- Flexible training and work schemes could provide potential trainers and facilitators of the future
- Job sharing opportunities will provide increased productivity
- Seasonal work will assist during the peak seasons
- Golden hellos will retain certain valued individuals
- Career diversification will extend corporate knowledge and capacity
- Mature age networks are establishing recruitment agencies - mature age workers will be more mobile, if organisations do not invest or value them!

Outcomes

A range of organisations have now established ‘Best Employers of over 50s’ both in the UK and US. This is a growing industry, with AARP now posting job and work opportunities for their members. AARP offers a wide range of services to all of their members, is a major industry in itself and advices companies on how to review their strategies for retaining their mature age workers.

Employment forum on Age is a not-for profit organisation in the UK whose role is to promote and expand the opportunities for the over 50s within the work force. They are lobbying government to increase and improve conditions for mature age workers. They are promoting strategies for re-engaging mature age workers and career diversifications.

Universities are concerned and well aware of ageism within their own industry, and the need to change the services they have available. They are keenly pursuing alternatives to the formal academic transfer of knowledge and skills. They are aware that flexibility and mobility across campuses will be their future.

Private organisations are finding it hard to recruit staff - and the focus is on mature age workers for their commitment, work ethics and staying power. Companies frequently endorsed their findings that their mature workers are more productive than the younger counterparts.
The under funding and poor investments of pensions funds have realised a major deficit which will not support individuals retiring on their planned date. UK has established 65 as the default retirement age.

Organisations in the future will need to review their own strategies and incentive schemes to better accommodate the ageing work force. Our work force is ageing and will continue to do so. Consumerism is on the increase, and employees want to retain a standard of living that they have established. They are after flexibility, acknowledgement of their worth and to play a key role in their organisation. If an organisation does not invest in their mature-ageing work force - their competitors will!

20 recommendations for organisations and their work force planning

1. HR strategies must be revised to better reflect needs of mature-age workers. Terms and conditions, contractual benchmarks as well as improved incentives will need to be included. Individuals should have an individual workplace and career plan - to increase the return on investment of any training, professional development in remuneration. Improved communication and consultation processes will need to be introduced.

2. Councils must review their Corporate Plan annually and will have to include and identify ‘management of cultural change as part of their corporate objectives. This will consider the changing dynamics of the work force and the attitudinal changes which will have to be better managed if organisations are to achieve maximum return on their return within labour force. It is believed that if there is no corporate commitment to this strategy - increased time will be spent on conflict management and resolution, crisis management and decreased productivity.

3. Review and establish Position Descriptions which specifically sets down targets, time frames and standards of behaviour with outcomes. This will enable the mature worker to be fully responsible for their own performance, whilst engaging and using the corporate experience they have acquired.

4. Improve training and development access, so as to encourage career diversification, increased organisation change and management of change. Traditional
5. Training is seen as a skills acquisition, but needs to be extended to attitudinal change, increased knowledge and responsibility to co-workers, regardless of age and experience. Harmony in the work force will be a major challenge in the future.

6. Individual Career and Progression Plans. If as we suspect, individual plan to stay in the work force longer, progression plans will enable the employer to increase shared responsibility of commitment, loyalty and outputs. To maximise the value of the corporate knowledge, our systems will have to reflect changing skills, knowledge and attributes as well as attitudinal change to the intergenerational work force.

7. Increased range of incentives to retain present work force will have to be incorporated in to the remuneration and support systems. Whilst it is acknowledge that any organisation has a bottom line for decision-making processes - acknowledgement of their greatest resource (people) should enable them to place a cost. This will assist when determining future directions and whether retention will be of added-value or a deficit in business terms.

8. Provide leadership opportunities for mature-age workers. Most employees interviewed identified that promotion and leadership opportunities were not available to them. They believed their organisation had already identified a ‘use-by’ date for them. Whilst they did not all wish to be part of the Executive Management Board, there was a belief that small projects or team leadership could be carried out by the mature-age worker - using their experience as the guiding tool.

9. Engage mature age employees as coaches/mentors/support workers for younger employees. There is a shortage of teachers and trainers. The introduction of Training Packages to provide formal recognition and qualifications has not been as success as it should have been - partly, because of the shortage of workplace assessors. Individuals who have extensive corporate knowledge and skills could be the most effective trainers and assessors, if given the appropriate training and investment. This in turn, would prove to be less costly than external consultants on a piece-rate.

10. Enable mature age workers to manage induction programs for new staff. One of the key challenges of the future will be communications within the intergeneration, improved understanding of each others roles and respect for each other as a person. If the induction program was led by an experienced mature-age worker, opportunities are then created for managing conflict in the future and improve relationships within the generations, at work.

11. Loyalty cards are available to all staff. As the number of services being accessed by staff increases, any discounting or support is seen as a major financial incentive - and reflects interest in staff as individual consumers.

12. Subsidies and incentives to assist with professional memberships. Corporate assistance towards health/fitness/leisure membership clubs would reflect investment in staff health and well being.
13. Involve experienced workers in establishing Corporate Plans. Business Plans or Corporate plans must reflect the directions of the organisation and priorities of the Board members. More often than not whilst community consultation processes are engaged, the involvement of staff and more experienced workers are not sought. In discussions with staff, a frustration exists whereby they have suggestions/innovations for improvements which are not listened to by the company.

14. Build on the experience of mature age workers - people will remain the greatest asset of any company. Any investment in that asset will prove its returns both in productivity, efficiency and commitment.

15. Improve communication strategies between different generations. As our work force diversifies and encompasses intergenerational involvement and performance any strategies or processes that encourages shared learning, information and responsibilities will result in a better understood work force, with the promotion of recognition of the value of each member of staff.

16. Intergenerational training is made available. Engagement of facilitators that provide interactive and engaging learning processes will result in shared information and respect of individual skills, knowledge and attributes. Organisations will need to improve the balance of the work force - training and development will be one vehicle, if accessed effectively.

17. Increase access to of flexible working hours, and working from home. As the range of work varies and information technology and telecommunications increases, a nature process would be to cut down on travel time and risk, and enable workers to have a home-base.

18. Improve consultation processes of mature age workers. Whilst organisations have Performance Appraisals in place, many workers see no value in this process. If employees were to be encouraged to mutually agree performance targets and outcomes, they could be encouraged to accept greater responsibility regarding their role and corporate performance targets.

19. Cultural change and shift required within organisations to maximise and improve upon their greatest asset - their people. The work force is changing, corporate expectations and outcomes are diversifying, to recognise the cultural shifts required will better enable the organisation to plan their work force.

20. Planning and investing in the work force, will lessen the chance of organisations losing their greatest asset - their people. If organisations do not invest in their work force, their competitors will.
Conclusion
It has been an honour and privilege to undertake this Winston Churchill Fellowship Award. I have been given the opportunity to (a) observe overseas practices (b) travel extensively and meet new organisations and people (c) establish international networks (d) acquire corporate materials and policies (e) increase my knowledge about ageism in the work force and (f) establish new relationships and friendships. I intend to continue my studies and research in this area, working towards implementing strategies for Australian workers to access opportunities and an extension to their working life, in the best possible manner.

The majority of organisations and individuals that I met with confirm the need for employers to reconsider their emphasis on the dollar (or pound) and make better use of the staff that work for them. Absenteeism, sickness and accidents are all a major cost to employers. Increased loyalty commitment and opportunities for their staff will, I believe, provide a greater return than most organisations realise.

Further results, reports and outcomes will be identified and disseminated within my present position through the following channels:

- The observations, meetings and interviews will be recorded into a comprehensive report for submission to Winston Churchill Trust by December 2005
- Recommendations and article to be posted on to the Local Government website by January 2006
- Outcomes and recommendations to be presented to the North Queensland and South East Queensland Training Consultative Committees (representing over 35 councils)
- Recommendations and findings to be shared with Queensland University of Technology (for consideration of further research and investment to assisting Local Government Councils in the future)
• Outcomes and recommendations to be reported back to Minister for Local Government at next Women in Local Government Steering Group

• Strategies and model to be prepared for dissemination to HR and Training Officers within councils by March 2006

• Responses and acknowledgement to be sent to all companies and individuals interviewed - with regular communications/networking to share innovations

• Discussion paper for the Local Government Skills Council and Enabling Queensland by June 2006

• Discussion paper for sister associations within Australia, to be present in March 2006

Please do not hesitate to contact me if you require further information or are interested in linking in to the networks I have established as a result of this Fellowship.

I will work to promote and encourage others to apply for this prestigious award - which is a great opportunity to promote leadership within Australia.

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