INTERNATIONAL STUDY: WORKFORCE REJUVENATION AND RETENTION
UNITED STATES, CANADA, UNITED KINGDOM, IRELAND

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2001 CHURCHILL FELLOW

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This study has been an exceptional opportunity to investigate international policy, research, programs and best practice in the area of workforce rejuvenation and retention.

I would like to express my gratitude to the Winston Churchill Memorial Trust for providing me with this valuable professional and personal learning opportunity to immerse myself in an area of professional interest which is important to both public and private sector organisations in Western Australia and nationally.

I would also like to express my sincere appreciation to the Vincent Fairfax Family Foundation for sponsoring this fellowship with a dedicated trust in the area of age related issues.

I wish to acknowledge the many organisations and agency personnel I met throughout the Fellowship who were extremely generous with their time and expertise. It was their depth and breadth of knowledge and professional practice which made this such a unique and rewarding learning experience.

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EXECUTIVE SUMMARY

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Current economies at state, national and global levels are confronted and challenged by an ageing workforce. This is a trend which has both economic and social consequences. The extent and magnitude of this challenge calls for a commitment to address this issue and related areas at the national and state level through policy, research and informed practice. However, most importantly it is through an integrated approach through government and organisational strategic planning and management which links areas of health, employment, education, training, social protection and equal opportunity, that issues in this area can be effectively addressed to meet short, medium and long term imperatives.

Approaches which facilitate the development and implementation of integrated strategies on age and employment, that strengthen and provide a framework for organisations and agencies to capitalise on the knowledge, expertise, experience and capacity of mature employees while achieving organisational goals and objectives, requires preventative and active approaches to address a changing economy and labour market.

The aim of this Fellowship was to examine policies, planning, innovative programs and research to address the area of workforce rejuvenation and retention within the context of an ageing workforce in public and private sector organisations. Particular areas focused on included professional learning and training, recruitment, workplace reform and productivity, organisational health, leadership and attitudinal change.

Visiting the United States, Canada, the United Kingdom and Ireland over ten weeks enabled me to meet with experts and practitioners who are working with these issues first hand and seeing the results that effective policy, site based research and innovative organisational practice can make to achieve organisational goals and objectives, enhance business outcomes and make a positive impact for mature employees and the wider organisational workforce.

The key focus of the recommendations as a result of this study, is the development of an integrated and coordinated age management strategy in favour of participation, performance and productivity of an ageing workforce. This ranges from state based policy, research and development initiatives and organisational support mechanisms that inform, influence and support the work of organisations and businesses to respond to the challenges of an ageing workforce. For organisations this means:

- establishing policies and instituting practice which meet organisational outcomes through measures which enhance the capacity of an older workforce
- eliminating age barriers in policy and organisational practice
- addressing attitudinal issues and stereotypes surrounding mature employees
- establishing an organisational environment/culture where workforce capability is strengthened through relevant professional learning and training and effective workplace flexibility and reform initiatives.
INTRODUCTION

Having worked in the Western Australian Department of Education in a range of roles, most recently as Manager of Strategic Human Resources, the focus of my work relates to supporting the work of the Department through the delivery of effective human resource management and development, providing relevant and responsive policies, programs and initiatives that cater for the diverse needs of schools and the Department’s workforce. This includes strategic workforce planning and development initiatives to ensure that the Department of Education has a workforce which is equipped with highly skilled employees who have the capacity to meet the diverse needs of students in schools.

One of the critical workforce planning issues emerging over recent years relates to the age profile of the workforce, both in education and the wider public and private sectors in Western Australia and nationally. This is signalled in the Western Australian Government’s *The Ageing Workforce Discussion Paper*, November 1999, the Department of Education’s *The Age Profile*, February 2000 and *Review of Ageing Trends*, April 2002. Information from these sources shows that this trend will increase over the next 5-10 years. In other Australian states similar workforce age profiles have emerged, with organisations looking for ways to address this phenomenon to ensure that their workforce capability is able to meet and progress organisational aims and objectives: both now and in the future.

Issues in relation to the nation’s ageing population have also been detailed in the *National Strategy for an Ageing Australia Report*, April 1999, which identified increasing concern about the economic impact of our ageing population. Over the next 10 years, it is estimated that 45 –64 year olds will be responsible for 65% of the growth in Australia’s labour force. The ‘baby boomers’, people born between 1946 and 1960, reached retirement age in 2001. By 2010 all baby boomers will be over 50 years of age. This will have a significant impact on the labour market, potentially giving rise to shortages across a range of occupations, including teaching.

Within this context, the capacity of organisations to strategically develop and manage an older workforce that is equipped to meet their diverse and complex needs, while enhancing the quality of employment for their employees, is a major issue. Organisations will need to become more astute and progressive in managing this cohort so that they can capitalise on the knowledge, skills, abilities and experience of older workers. Within the education context, this workforce planning issue is critical in relation to the current and future supply and demand of teachers and the capacity of education systems to strategically plan and manage the future development of education and adapt and create workforce profiles that achieve these aims.

Additionally, across other public and private sector agencies, the ageing workforce will have a critical impact in terms of delivering on business outcomes in a changing demographic environment and its influence and impact on client and customer needs, expectations and future business development.

The aim of this Fellowship was to examine policies, innovative programs and research focused on workforce rejuvenation and retention, specifically within the context of the ageing workforce. This ten week program involved travelling the United Stated, Canada, the United Kingdom and Ireland to examine issues within the context of themes such as workplace...
reform, workforce learning and development, attitudinal change, workforce productivity and organisational leadership. This included visiting a range of public, private sector organisations, universities and agencies who are noted for excellence and innovation in this field.
BACKGROUND

Global Perspective

By 2050, the number of older persons in the world will exceed the number of young for the first time in history. Population ageing is unprecedented, without parallel in history of humanity. It is a global, pervasive and irreversible phenomenon.

The increase of older age groups in national populations, in both absolute numbers and in relation to the working-age population, has a direct bearing on the intergenerational and intra-generational equality and solidarity that form the basis of society. With consideration to societal progress, population ageing has an impact on established structures, social norms and conventions, work life, organisational development, workplace productivity and subsequent prosperity of nations.

In response to population ageing and its impact on employment and the labour market, international efforts are focused on combating early retirement to encourage older workers to remain in the workforce and to create a work environment that maximises the potential of this group of employees and eliminates barriers in their employment.

European Context

With the establishment of the European Observatory on Ageing and Older People in 1990, several key policy and priority action areas for age and employment for older people were identified with a focus on combating age barriers in employment, especially discrimination against older workers in recruitment, promotion and training.

The 1993, a European Commission’s White Paper, *Growth, Competitiveness and Employment* set strategic goals for policies and actions focused on more flexible workforce and employment practices, increasing the inclusion of older workers and engendering greater social cohesion.

In 1994, a European project on combating age barriers in job recruitment and training, (involving seven European Union countries) was established with the focus on initiatives in favour of retention, reintegration and retraining of older workers. The project initiated the collection of data and information on successful practice within organisations.

In 1995, the European Union proclaimed *The Resolution on the Employment of Older Workers* promoting “the need to redouble efforts to adapt professional training and conditions of work to older workers’ needs”, “the necessity to take measures to prevent the exclusion of older workers from the labour market”, and ensuring that “older workers have sufficient financial resources”.

United States Context

The American government and employers acknowledge the serious economic implications of the ageing workforce on the American economy and anticipate a decrease in future living standards, a rise in the dependency ratio, low national saving due to the increasing cost of old-age entitlement programs and stagnation of taxes from wages and salaries.

A steadily decreasing number of new employees entering the labour market and a wider span between baby boomers and younger workers, necessitates increasing work opportunities and incentives for older workers to become/remain employed.
It is postulated that initiatives focused on discouraging discrimination of older workers in the job market and workplace, changing federal regulations inhibiting flexible work arrangements, changing employers’ attitudes and policies and removing obstacles preventing employment of older workers, such as pro-retirement pension plans, will be conducive to achieving this goal.

The Committee for Economic Development recommended a “pro-work” agenda for employers, policy makers and older workers with six areas to focus on through initiatives and policies. These include:

- getting the financial incentives right, namely Social Security and Medicare entitlements
- shifting stereotypes about older workers
- reorganising work-oriented learning among older workers
- rethinking the organisation of work
- support for older workers in new jobs through revised recruitment practices, flexible work arrangements and access to training
- ensuring a strong and flexible economic safety net.

Canadian Context

While a growing number of Canadian organisations are reducing the size of their workforce through voluntary or involuntary early redundancy incentives, conversely, the federal government concentrates its efforts on controlling and limiting “early exit” and providing incentives to expand employment of older workers beyond the age of 65.

Having acknowledged the ageing workforce of Canada to be the “strategic human resources challenge of the 1990s and beyond”, the Innovations Program of Human Resources Development Canada recognised the necessity to establish a relationship between age, health and productivity to inform policies in relation to older workers.

Research findings call on society and employers to enhance the productive potential and work capacity of older workers rather than concentrate on past or present on-the-job performance of individuals as the measure of productivity. They focus on identifying and addressing changes that are required in the workplace, and in the nature and organisation of work itself, for work capacity to be enhanced, thereby maximising the productivity of older workers.

Based on this innovative research, Canadian organisations are developing corporate policies on recruitment, promotion, training and retirement based on workplace function rather than age. They maintain a focus on increasing the capacity of older workers by adapting work tasks, work conditions and work arrangements, and providing quality training and re-skilling opportunities to bridge the gap between work demands and capabilities.
STUDY PROGRAM

This ten week Fellowship involved visiting an eclectic mix of organisations which are globally recognised for their innovative programs, research and policy development in the area of workforce rejuvenation and retention, particularly within the context of an ageing workforce.

Listed in this section are the organisations and individuals visited and the specific areas of work they are involved in, within the context of this study’s theme. A comprehensive contact list appears at Appendix A.

WASHINGTON

*Urban Institute:* government policy issues – age and employment; research - social security and retirement issues, barriers to employment, innovative research methodology - economic, social and demographic trends; and evaluation of government programs.

*George Washington University:* research and development programs– adaptation to ageing; career development, transition and renewal; and workforce recognition.

*National Older Workers Career Centre (NOWCC):* innovative workforce rejuvenation programs within the public sector; organisational education and training; professional learning and development programs; policy development; recruitment, management and retention of mature employees.

*American Association of Retired Persons (AARP) Public Policy Institute:* research and policy development - health, economics, independent living, consumer protection; workplace advocacy; age discrimination and employment; and equity and diversity issues in employment.

NEW YORK

*United Nations:* population growth and age composition issues - impact on health and education; global policy development; economic, social and cultural rights of older people; and impact of population ageing in the workplace and community.

*New York City Department for the Ageing:* recruitment and retraining initiatives in public sector agencies; government policy development related to age and employment; cross-sectorial collaboration; and policy development and implementation.

*International Longevity Centre:* research, education and policy initiatives related to population ageing and the workforce incorporating: intergenerational relationships in the workplace, training and development, workplace productivity and effectiveness.

*Committee for Economic Development:* workplace barriers impacting on older employees; organisational productivity; training and development; and policy development and design.

CANADA

*Ontario College of Teachers:* education reform initiatives, recruitment and retention of teachers, workforce effectiveness, professional standards and legislation management.
University of Toronto
Institute for Human Development Life Course and Ageing: extensive research on issues impacting on an ageing workforce; organisational case studies relating to the public and private sector; and development, implementation and evaluation of initiatives.
Professor David Foot: author and economist. Economic impact of demographic change on the public and private sector; creating organisational excellence; workforce effectiveness; succession management; and corporate planning.

University of Guelph – Centre for Families, Work and Well Being: research and development related to equity and diversity, workplace flexibility, organisational health, intergenerational issues and technology in the workplace.

Public Service Commission: equity and diversity initiatives; and public sector policy development and organisational reform.

International Centre for Educational Change: knowledge management; innovative human resource policy development and informed practice; workplace diversity programs and innovations; and workplace centred research relating to organisational change.

IRELAND

European Foundation for the Improvement of Living and Working Conditions in relation to the nine European member nations. Research and development initiatives and policy development: combating age barriers in employment; age management in organisations; attitudinal and management change; workforce retention programs; impact of organisational culture on mature employees; barriers blocking implementation of good practice; job design; and workplace flexibility.

Watson Wyatt and Partners: management attitudinal issues relating to an ageing workforce; executive training and development; organisational health and well-being; and recruitment.

UNITED KINGDOM

University of Leicester, Centre for Labor Market Studies: workplace learning and high performance work practice; national skill formation systems; training and development research and best practice – international focus; workplace transformation – exploring new forms of work; corporate knowledge management; and organisational performance.

Baroness Greengross OBE: Former Director General, Age Concern and member of the Committee for Social Affairs, Education and Home Affairs: government policy related to age and employment; taskforce work related to ageing and age discrimination in employment.

Department for Education and Skills (DFEE): workforce planning and development initiatives; teacher supply, demand and recruitment; education policy development and implementation.

Open University: research on workplace change, stress and organisational learning; leadership and management attitudinal issues relating to an ageing workforce

London Business School, Centre for Organisational Research: leadership development programs; research on innovative organisational practice, organisational cultural change; innovative human resource strategic development; and strategic succession management.
PROGRAM HIGHLIGHTS

All the organisations and individuals visited during this Fellowship study were involved in extensive and progressive work related to population and workforce ageing, with a focus on policy, research and the development and implementation of innovative programs and practice. The following are a sample of the unique ways in which individuals and organisations are addressing this issue.

**URBAN INSTITUTE – WASHINGTON: UNITED STATES**

The Institute is a non-profit, non-partisan policy research and educational organisation established to examine the social, economic and governance problems facing the nation. It provides information and analysis to public and private decision makers to help them address these challenges and strives to raise citizen understanding of these issues. The Institute’s research is conducted by nine major policy centres related to labour and social policy, education, health, income and benefits, justice, international activities, nonprofit and philanthropy, metropolitan housing and communities and population studies. Some key areas of work being undertaken by the Institute include:

- greater work participation by older people significantly impacting on the cost of age programs and aged care
- economic effects of demographic changes and its impact on society and organisational life
- government systems related to pensions and retirement, with a focus on an incentives approach
- research related to educational issues focused on teacher certification, recruitment, educational opportunities for immigrant students, achievement standards and the evaluation of national programs.

Some key initiatives related to recruitment, particularly within the context of high exit rates from beginning teachers include the Pathways To Teaching Careers Program, the Troops for Teachers and Teach for America Program. A six year evaluation of the Pathways to Teaching Careers Program, which recruits new teachers from the ranks of mature para-professionals and other non-traditional candidates such as Returned Peace Corp Volunteers to teach in the neediest of school districts, has been highly successful.

The uniqueness of the Urban Institute’s work is its focus on detailed and comprehensive investigation of social policy issues which make a critical impact on informing political decision-making, organisational reform and public policy debate through research papers and reports, public commentary and education. This includes developing educational materials for a range of organisational and public contexts and presentations to agencies. Their capacity to undertake innovative research methodology to analyse issues and trends to inform local and national directions, test public policies and proposals for effectiveness to address social and economic challenges, is a key success of their work.

**NATIONAL OLDER WORKERS CAREER CENTER (NOWCC): WASHINGTON, UNITED STATES.**

The aim of NOWCC is to expand employment and training opportunities and options for individuals aged 40+ years through job placement, education, research and advocacy. They
work in partnership with public and private sector organisations and agencies to develop workplace innovations and strategies to recruit, retrain and rejuvenate mature employees.

One highly successful long term nation-wide initiative for the employment of older workers is the Senior Environmental Employment (SEE) Program, run by the Environmental Protection Authority. The program places individuals aged 55+ years in a wide variety of full-time and part-time temporary support assignments in administrative and specialist scientific areas at federal, state and local environmental agencies. The program demonstrates that skilled and professional older employees play a valuable role in the organisation, in addition to acting as mentors to trainees to younger workers. Approximately 2,000 individuals participate in the program, contributing a wealth of expertise, knowledge and experience which has become a significant part of the profile of the EPA. This program has enabled the EPA to successfully achieve their business outcomes through highly efficient and effective human resource management practice, while providing a model for exemplary practice related to older employees.

NOWCC also provides education and training to assist employers in the recruitment and retention of mature workers and supports them to enhance their human resource practice in this area to maximise the expertise and potential of an older workforce. Evidence from the work undertaken by NOWCC demonstrates that if an organisation is informed, implements relevant programs and supports mature employees in the workplace, the gains are long term: improving workforce morale, productivity and employee learning and development, which are reflected in tangible benefits for the organisation and individuals.

**UNITED NATIONS**

The United Nations Population Division in the Department of Economic and Social Affairs, monitors and reports on demographic, economic and social aspects of population ageing at global, national, regional and sub-regional levels.

The processes employed in monitoring issues and trends and integrating population and development strategies, policies and programs on a large scale, demonstrated lateral and innovative ways of planning, program design, information management, reporting and translating information for a wide range of purposes and within diverse contexts.

Although the organisation’s work focuses heavily on the needs and perspectives of developing countries, the application of their work to the Australian and Western Australian contexts can inform how we strategically plan, manage and address population and workforce demographic priorities, both politically and organisationally.

A prominent role of the Population Division is studying population ageing, including estimating and projecting older populations and examining the determents and consequences of this trend in the coming decades. Key work undertaken in this context includes bringing information and issues to the international community to enable global, national and local solutions to be developed in partnership.

The impressive way in which information is analysed and integrated to signal the impact on economic growth (savings, investment and consumption, labour markets, pensions and taxation) and in the social arena (health and health care, family composition and living issues, housing and immigration) is valuable and translatable across organisations and within
individual organisations, and demonstrates how this type of work can inform local, state, national and global contexts and needs.

In addition, the Second World Assembly on Ageing in Madrid for 2002 brought to the forefront the scope of issues associated with population ageing in the twenty-first century, the major differences between developed and developing countries and the wide range of contextual policy and program solutions that need to be developed to effectively progress these.

INTERNATIONAL LONGEVITY CENTRE

The Centre is a private, nonpartisan international centre devoted to policy, research and education on the ageing of populations. It’s a multinational research and education consortium addressing longevity and population ageing in positive and productive ways, highlighting older people’s productivity and contributions to their families and society as a whole. The Centre works autonomously and collaboratively to study how greater life expectancy and increased proportions of older people impact on nations around the world.

Their work is highly integrated and crosses multiples disciplines including demography, sociology, economics, humanities, ethics, medicine and public health. It results in the development of research and educational programs in relation to health, work and family. This includes raising awareness among public and private sector leaders, the media and the public about the impact of longevity and population ageing on individuals and society. Their work demonstrates that issues need to be addressed in a holistic way: in contexts of family and community life, work life, health and quality of life, demonstrating the impact not only on workforce issues, but on the future health care and well being of individuals.

Research and program areas of the Centre include:

- the economics of ageing
- the employment and productive activity of older persons
- the impact of population ageing and longevity in key locations of the global economy
- the Health Life Program focusing on advancing health through research, education and policy initiatives
- a communications and education program
- a partnerships program focusing on collaborative work with organisations, nationally and internationally
- intergenerational issues and awareness.

PROFESSOR DAVID FOOT: AUTHOR, “BOOM BUST & ECHO”

I had the unique opportunity of meeting with Professor David Foot: author and demographics expert, whose extensive experience researching and working with organisations in Canada and internationally afforded a unique insight into the impact of demographics on the community, government and business. Highly challenging and most insightful was how the changing demographics, especially the ageing of the massive ‘baby boomer’ generation and the entry of their children into the market and workplace, will redefine society’s needs and how this issue is managed within the context of business planning, career planning, corporate organisation, housing, education, human resource management and community development. Professor Foot’s perspective enabled me to integrate many of the areas of this study linking research, policy and practical organisational work and ways in which these can be applied within diverse contexts. Utilising a wide range
of approaches, with a strong focus on addressing the improvement of business outcomes through effective workforce profiling, management and development, is a key strategy employed by organisations. His economic perspective highlighted the value for organisations addressing the ageing workforce trend in proactive and innovative ways, demonstrating that through coordinated and integrated strategies, organisationally and nationally, organisations and society can capitalise on this continuing trend, thus resulting in better organisational and business outcomes and an enriched workplace and society.

CENTRE FOR FAMILIES, WORK AND WELL BEING - UNIVERSITY OF GUELPH: TORONTO, CANADA

Situated at the University of Guelph, the Centre is an innovative and interdisciplinary research centre which links research activities with community needs and priorities. Its focus is on the well being of individuals and families in the context of changing work patterns, family roles and community services.

The range of activities undertaken by the Centre includes:

- research on the life stages of work and how to translate learning to new situations, by collaborative work with public and private sector organisations
- the workplace Health Pilot: incorporating a diagnostic tool designed to improve work environments through an on-line survey to measure employee stress, perceptions about workload and health demands. This information is used to inform interventions and changes for workers and workplaces
- provision of facts sheets and information packages to local community businesses and organisations relating to issues impacting on work and family and workforce demographic changes, and how solutions can be integrated to meet both family and workplace needs.

EUROPEAN FOUNDATION FOR THE IMPROVEMENT OF LIVING AND WORKING CONDITIONS: DUBLIN: IRELAND

The European Foundation (EU) carries out research and development projects to provide data and analysis for informing and supporting the formulation of EU policy on living and working conditions. It provides findings, knowledge and offers advice from comparative research managed in a European perspective and monitors and reports on a range of initiatives in the nine member countries.

Over the past five years, significant and progressive work has been undertaken in relation to combating age barriers in employment, focusing on good practice in age management and successful and transferable initiatives relating to establishing new workplace policies towards age and employment. These include:

- extensive research related to combating age barriers in employment, within the European context, with a current study looking at ten years of working conditions in the European Union
- age management in organisations and successful practice related to: job recruitment and exit; training, development and promotion; flexible work practice; ergonomics and job design; and changing attitudes towards ageing workers
- research identifying barriers which impede implementation of effective practice and the impact of organisational culture, particularly within areas of leadership and management
- extensive case studies identifying innovative practice in relation to organisational management, collaborative work with employees, sensitive and flexible implementation and organisational support
- good practice designed to prevent the occurrence of age discrimination, unemployment and age management problems.
SUMMARY OF MAIN ISSUES AND LEARNINGS

The issues related to age and employment are multi-dimensional, complex and link with all elements of work and society. The ways in which organisations and governments address this will determine and demonstrate a country’s prosperity and how that prosperity sustains economic, social and cultural growth. Furthermore, future competitiveness in the private sector and efficiency in the public sector will rest on the performance and productivity of the ageing workforce.

The focus for age management and adjustment to workforce ageing needs to be organisation led where a commitment to enhancing practice in the employment of older workers occurs and active public policies in response to workforce ageing are undertaken by government, which in turn supports organisations, and organisations which in turn support individuals.

This responsibility for action rests with government, organisations and ageing workers themselves, where age management is both an individual and a collective responsibility. It requires active measures and integrated strategies in favour of the participation, performance and assessment of the ageing workforce and how organisations can harness and maximise the capabilities of this workforce group and invest in their development to meet and creatively progress emerging organisational needs.

Organisations which have been highly successful at addressing issues in this area have made it a priority to ensure that workforce activities are part of both a strategic and managed approach which address short, medium and long term needs of the organisation and the individuals who form its workforce. Some key factors identified in international research and best practice organisational models which have supported organisations in dealing with issues related to an ageing workforce have included the following:

- A good understanding of an organisation’s workforce profile and its impact and implications in the short, medium and long term, in the context of strategic business goals and objectives. This enables targeted policy and initiatives to be developed, substantiated by data and research, and congruent with the strategic mandate of the organisation.
- An integrated approach to age management which is linked to the organisation’s wider strategic workforce planning and development program, where age management is addressed through a planned strategy incorporating effective human resource management practice through innovative policy, active leadership and a strategic direction which informs and supports.
- A willingness to assess human resource policy and practice to identify issues and possible barriers in areas such as recruitment, training and development, workplace reform planning and processes, flexibility, incentives, career development and occupational health and safety.
- Age management awareness to address the myths and stereotypes that have developed around mature employees. Access to information which counters stereotypes, demonstrates the added value of a mature workforce and how to maximise the potential of this group of employees, enables a shift from bias to informed committed action.
- An authentic commitment across leadership and management to develop and implement relevant and tailored strategies which suit both organisational/business and employee needs.
- An organisational philosophy of learning and development, with commensurate action which values and rewards this ethos.
Research
The critical role of research in relation to the issue of workforce ageing ranged from assessing the impact of demographics on populations, communities and workplaces to case studies of successful and innovative organisational practice which has been detailed and evaluated.

The research perspective explored through this Fellowship comprised of examining how specific agencies focus on:

- conducting research to inform local and national policy development, both government and organisational
- application of research and information to inform, educate, raise awareness and influence decision-making
- using information in the development and implementation of better practice in age management
- applying information and research to organisational contexts.

However, using research to inform organisational development and activity was less widespread than expected, largely due to research being undertaken across a wide range of disciplines, agencies, universities and individuals without mechanisms which identify, integrate and communicate the wealth of findings. Being able to experience the range and diversity of research across a range of disciplines and organisational contexts highlighted the considerable value and contribution that research can make to educate, inform, influence and progress knowledge and understanding in this field.

Policy
This Fellowship has enabled me to examine a wide range of policy issues and approaches, at global, national, local and organisational levels, both in relation to workforce ageing issues and how these are dealt with within a policy context. The progressive work of public policy institutes and agencies which review and evaluate government and organisational policy, research policy approaches and processes and assess the impact of policies on populations and organisations, has demonstrated the critical impact that sound policy and process decisions can have economically and organisationally, and on groups and individuals.

In addition, public policy processes have the capacity to influence the work of organisations, establishing the external context within which they can develop their own relevant approaches to age management.

Some brief examples of the types of activities occurring in relation to policy development include:

- the creation of national and local employment policies which encourage the development of private sector policies and programs which support the expansion of innovative tax policies to encourage job growth and creation
- showcasing policy and best practice employee initiatives that promote the value of age diversity in the workplace and business, recognising the value of positive characteristics of mature workers
- business investment in staff education and training on the value of a more experienced mature workforce, how to eliminate ageism in the workplace and how to recruit, manage and retain mature workers, whilst increasing workforce capability
- offering incentives to organisations wishing to hire, retain, train and develop older workers
- reviewing superannuation policies to enable employees to access phased retirement without penalties.

Employers

Good practice in age management needs to be organisation-led in terms of creating conditions in which employees can manage their own careers and ageing, and where the organisation can capitalise on the knowledge, skills, abilities and expertise of mature employees to improve organisational/business outcomes, whilst concurrently recognising and valuing this workforce cohort. The following are a small sample of the range of strategies in age management which have been successfully researched, trialed and implemented overseas. It is important to note that these strategies were implemented in an integrated way, based on addressing issues of organisational environment, culture, leadership and management.

- Development of age awareness policies at all organisational levels, initially on a trial basis in areas such as recruitment, training, equity and diversity and other aspects of employment.
- Introduction of age awareness training, particularly for line managers, which addresses stereotypes and attitudes associated with age and research related to ageing and performance.
- Involvement of mature workers themselves in discussions/forums relating to professional learning and development, career development and progression and policy issues.
- Investigating areas of ergonomics and job design as preventative measures to support mature employees in the workplace. This also includes issues related to working conditions, workload, task organisation, combining young and older workers, age related health issues and its impact on work responsibilities.
- Supporting individuals or groups of staff who want to develop initiatives to combat age barriers, such as encouraging horizontal moves in careers rather than vertical ones, employee developed initiatives to address business needs, which also include opportunities which mature workers can access.
- Assessing training and development needs of mature employees and tailoring training opportunities to their learning styles, in addition to creating learning environments that challenge and support individuals.
- Enhancing flexibility through:
  - the use of mature experienced people or retirees from the organisation on special projects or off-line work programs such as mentoring or part-time consultancy, or introducing job rotation to expand skills and enhance motivation
  - offering greater flexibility in hours of work or the timing and nature of retirement which may be an attractive feature to retain or recruit workers
  - the importance of family-friendly policies which support diverse family responsibilities and quality of life priorities.
- Changes in work organisation aimed at increasing productivity and building employee commitment and motivation. Strategies include: innovative job design or work re-organisation to maximise the knowledge, skills and expertise of mature workers, as well as short term work placements to develop new skills.
- Addressing intergenerational workforce issues which can provide benefits for both younger and older employees.
• Building understandings related to age-related changes for older individuals and their relationship to work and productive potential and facilitating innovative approaches to achieve successful and effective retention.

**Employees**

If employers’ responsibility relates to creating conditions in which individuals can manage their own careers and ageing, then employees have a parallel responsibility to take advantage of that opportunity to improve their own employment prospects and manage their own ageing and careers with support and encouragement from their employer.

*Some examples of effective ways in which individuals can support themselves in the workplace includes:*

• assessing their own training needs
• communicating training needs to managers
• taking advantage of training, development and learning opportunities
• using the wealth of knowledge skills and abilities they possess by undertaking different roles in the workplace, such as acting as mentors to young people, volunteering to participate in, or initiate, new projects or work which may benefit the organisation
• adjusting to horizontal career moves rather than vertical shifts (and the change in seniority-related wage increments that this will entail).

What has been evident throughout this study program is that although outstanding work and research has been undertaken, the capacity or perhaps willingness, for organisations to implement programs to address older employees has been contrastingly less than the wealth of research available. Some of the possible reasons for this includes:

• viewing this workforce planning imperative as one that can be addressed at a later date, when a critical stage had been reached and a reactive approach to issues is the only option
• the capacity of organisation to address this issue without an overarching age management strategy or plan which links to the strategic direction of the organisation and continues through to workplace practice. Piecemeal strategies and approaches have been found to have minimal impact for individuals, often demonstrating a lack of commitment to their professional well-being
• the cultural environment of the community and workplace, where the stereotypes and biases are not countered with education, awareness and information on the reality of mature workers
• a lack of willingness to embark on addressing these issues, confident that leadership, resourcing and support is an integral part of an organisation’s long term commitment.
DISSEMINATION OF FELLOWSHIP INFORMATION

The findings of my Churchill Fellowship will be disseminated on a national, state and organisational level through the following avenues:

- Making the study’s findings available to organisations through visits and dissemination of information and offering to participate in relevant forums to share information.
- Seeking relevant forums to present information first hand. The first of these will occur at two sessions of The 6th Global Conference on Ageing, held in Perth in October 2002.
- Within the Education Department, in my role as Manager, Strategic Human Resources, I have the opportunity to apply the information and learnings I have obtained to human resource policy and project initiatives.
CONCLUSION

This report briefly outlined some of the information and issues I have been exposed to while investigating the area of workforce rejuvenation and retention within an ageing workforce context: how it impacts on organisations; actions that can be taken to address the emerging issues at government, organisational and individual levels and how organisations can seize opportunities to capitalise on this large profile group to progress and enhance organisational goals and objectives.

The capacity of organisations to use the wealth of research, develop relevant policy, institute successful practice and create programs and strategies which enhance workforce capability, create challenges for both the economy and society, on the one hand, and for mature individuals on the other.

Fundamental changes are needed in the climate of public policies, the culture of work organisations and in the attitudes of individuals that form part of the ageing workforce to ensure a skilled and adaptable workforce is positioned to meet the needs of increasingly complex and changing workplaces, while simultaneously addressing individual career and life needs. This interconnectedness of life and work is more prevalent within the ageing worker cohort, with organisations needing to become more enterprising about how to effectively manage and provide a work environment in which employees are valued for their experience and expertise, and in which the second part of their professional career is as stimulating, rewarding and challenging as the first.

Clearly, the highly successful work and experiences of organisations visited demonstrates that successful practice in the employment of older employees consists of: combating age barriers; establishing policies that address government, organisational and individual needs; and providing an environment in which each individual is able to achieve his or her own professional potential without being disadvantaged by their age. International work and programs have shown that when this type of practice is embedded in the workplace, business outcomes are achieved, organisational culture is enhanced and individual and workforce productivity is strengthened.

The impact of longevity and population ageing, not only in the workplace, but on individuals and society, is the challenge government and organisations need to effectively address to ensure economic advantages are capitalised on and society’s and the individual’s needs are fulfilled.
RECOMMENDATIONS

The following recommendations are based on the experiences of visiting key people and agencies involved in policy, research and innovative organisational practice in the area of workforce rejuvenation and retention. In suggesting recommendations in this context, it is important to note that workforce ageing is part of the wider complex issue of ageing in our society and links with disciplines such as health, economics, education and training, social protection and equal opportunity.

Although this Fellowship afforded extensive information in a wide range of areas related to this study’s theme, recommendations in this report have been made specifically in relation to workplace/employment issues. In addition, to respond appropriately to the challenges posed by an ageing workforce, it is important to recognise the wide-ranging organisational contexts employees work in and the diversity of responsibilities they undertake. Therefore actions undertaken in relation to policy formulation and development of initiatives will require organisational tailoring to effectively meet workplace and individual needs.

1. Development and communication of an integrated age management strategy by governments, national and state, which includes the design of policies, plans and initiatives related to dealing with an ageing workforce in response to identified opportunities and challenges. This includes taking a ‘whole of working life’ approach within the concept of ‘age neutrality’ while also addressing ‘age-specific’ employment issues to be remedied.

2. A consultative forum initiative is undertaken to:
   - integrate information and investigate issues affecting organisations/agencies in relation to the impact of an ageing workforce
   - conduct consultation in relation to existing policies and practices with regard to placement and use of the potential and expertise of older employees in different areas of economy and society
   - coordinate research efforts to inform business and public sector initiatives on issues with regard to mature employees
   - strengthen inter-sectorial and national partnerships to encourage and facilitate sharing of information, research and innovative practice in this area
   - establish policy review processes to eliminate artificial and discriminatory barriers to the employment of older workers and monitor the application of principles of flexible employment and age diversity in employment policies and practices.

3. A code/charter of good practice in the management of an older workforce be developed to support organisations and promote the benefits of workforce diversity.

4. Develop an employer awareness strategy aimed at providing information about the benefits of a mature workforce, ways organisations and businesses can capitalise on their mature workforce profile and ways in which myths and stereotypes can be addressed.

5. Ongoing research is undertaken to identify and highlight effective and innovative practice in the management of mature employees in the workplace and how barriers can be addressed.
6. To hold forums on ageing and employment designed to obtain the views of employers, employees, stakeholders in the labour market and social partners to inform ongoing work in this area.

7. Initiatives favouring retention, reintegration and retraining of older workers be supported through government and organisational incentives and support programs.
### Appendix A

#### Fellowship Contact List

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