

**Managing the workplace without mandatory retirement case study:
suggested answers.**

1. Do you agree with the statement that ‘the most significant contributions of an individual often are made at the beginning of his or her career’?

This is likely to be a stereotypical assumption since there seems to be no evidence to support this statement. There is a vast body of academic literature that investigates the link between age and performance in the workplace in general. The findings from these studies are mixed and the evidence is inconclusive. (Waldam and Aviolo, 1986; McEvoy and Cascio, 1989). Furthermore, ‘gerontological science demonstrates that individuals must be assessed as individuals and not assumed to possess the average properties of their age group’ (Grimley Evans 2003: 16). Medical evidence shows that some physical functions decline with age however, some cognitive functions can improve with age like for example ‘control of use of language or the ability to process complex problems in insecure situations’ (Ilmarinen, 2001:548).

2. What advice would you give to University X in order to develop a more ‘robust’ approach to performance management?

Several line managers working in the HE sector reported that sometimes there is a tendency to turn a blind eye to poor performance in the run up to retirement. However, they believe that in future, if staff are going to work longer, performance issues will need to be tackled fairly and consistently at whatever stage of an employee’s career (Manfredi, 2008). When reviewing approaches to performance management, employers may consider the following points:

- Provide training for those who assess staff performance to tackle age stereotypes, like the one discussed above. It is important to avoid age bias in the way the performance of older workers is monitored and managed, as this may lead to claims of age discrimination.
- Identify clear performance indicators and how performance is assessed (e.g research outputs; students feedback; regular staff appraisal); make sure that managers and employees have a shared view about performance expectations (these will differ depending on the content of the job), at different stages of an employee’s career.
- Support staff through training and other initiatives to enable them to enhance their performance.

Provide training and support for those who assess staff performance to ensure in so far as possible consistency of approach, since managers tend to appraise by different standards (Torrington et al, 2002).

3. What are the main issues raised by the Dean of the Faculty of Combined Sciences and, in your view, how could they be addressed?

Research undertaken in the sector highlighted that several academic managers are concerned that if older colleagues do not retire this may lead to a reduction in the turnover of academic staff which, in turn, could lead to a reduction in job and career opportunities for younger academics (Manfredi, 2008; Manfredi and Vickers 2009). Research undertaken in the US suggests that academics in research-oriented institutions are more likely to continue to work past traditional retirement ages than those working in teaching-oriented institutions (Sugar et al, 2005).

Flexible retirement provisions could help to address this issue as they would enable older staff to continue to work while at the same time freeing up resources and career opportunities for younger staff. It is also worth considering the example of US institutions (within the US) that have established so called Emeriti/Retirees Centres. One of the best documented experiences is that of UC Berkley retirement Centre that offers the opportunity to retired academics, as well as to other staff, to retain their affiliation with their institution by continuing to offer their expertise to teaching, research or to other activities that support their university's mission (Glazer et. al, 2005).

4. What steps do you think could be taken to reduce uncertainty about staff's retirement plans and facilitate effective workforce planning?

There can never be absolute certainty about staff's plans since younger employees may decide to leave and take up a new job somewhere else at anytime. As staff approach retirement age they may be less inclined to change job and there can be more certainty as to what their plans are likely to be. Research indicates that often line managers are reluctant about discussing retirement plans with their staff for fear of sounding 'intrusive' or being misinterpreted (Manfredi, 2008). Evidence from the experience in the US universities suggests that often employees, particularly academics, tend to plan very late for their retirement or, as they get older, they are more likely to wish to continue to work.

It is important to promote a culture where career plans, including retirement, are openly discussed. But equally it is important that HEIs are pro-active in providing their staff with information about pensions, opportunities to change or reduce their working patterns and flexible retirement. This will enable them to make informed choices about their retirement plans and encourage open discussion with their employer.

5. Can you suggest ways in which University X could better capitalise on the skills and experience of older employees?

Older workers could act as mentors to younger or new colleagues. This would enable organizations to capitalize on their expertise and facilitate the flow of knowledge between different generations of employees. Intergenerational working teams can also facilitate the flow of knowledge between older and younger employee. Secondments may be used to deploy older workers on specific tasks or projects where they would be able to contribute their expertise.

6. What advice would you give to the Director of Campus Management Services to support extended working lives for manual staff?

In order to support older workers Occupational Services may take a more pro-active role to promote well being in the workplace (see the HEFCE funded project www.wellbeing.ac.uk). A useful approach known as work-ability that was developed in Finland in the late 1990s by the Finnish Institute of Occupational Health. This can be broadly defined as 'the development of human capital to meet the demands from the labour market' (Ministry of Social Affairs and Health 2002: 24). As part of this approach various interventions have been identified to maintain work ability and prevent early retirement through ill health, and these include:

- The use of a work ability index based on a self-assessment questionnaire
- The development, through training, of management capability to deal with work ability
- Workplace programmes to promote exercise and physical well being
- Improvement of the workplace environment
- Training programmes for older workers to ensure that they keep up to date particularly with new technology.

Ilmarinen, who has developed the work-ability approach, commented that 'we have been blaming the wrong source – the human beings – saying 'you are poor' although really it's the job that is poor' (Moving the Finnish Line at Work, BBC News 2004).

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