List of case studies – Managing an ageing workforce / extending working lives

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Theme(s)</th>
<th>Date(s) developed</th>
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<tr>
<td>ABM University Health Board</td>
<td>Meeting key skills shortages (midwives); awareness-raising; flexible retirement</td>
<td>2010</td>
<td>NHS Wales Awards 2010: Developing a Flexible and Sustainable Workforce <a href="http://www.wales.nhs.uk/sitesplus/829/page/48274">http://www.wales.nhs.uk/sitesplus/829/page/48274</a></td>
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<tr>
<td>Portsmouth NHS Trust</td>
<td>Removal of fixed retirement age; operating to a ‘well-being’ holistic model; flexible working; recruitment of older workers;</td>
<td>2011</td>
<td>Yet to be published but expected to be appearing via CIPD / NHS Employers channels (Autumn 2011).</td>
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<tr>
<td>Barnet College</td>
<td>Removal of fixed retirement age; retirement conversations and support to staff; knowledge retention</td>
<td>May/June 2011</td>
<td>Learning and Skills Improvement Service (LSIS): NB: full case studies due to be published on LSIS website by end August 2011.</td>
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<td>Stoke-on-Trent College</td>
<td>Removal of fixed retirement age; workforce and succession planning</td>
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<td>Wakefield College</td>
<td>Removal of fixed retirement age; retaining and developing talent; staff awareness-raising</td>
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<td>Epping Forest College</td>
<td>Removal of fixed retirement age; tackling skills shortages; recruitment from other industries</td>
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<td>Grantham College</td>
<td>Removal of fixed retirement age; capability performance management; line manager comms</td>
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<td>Queen Alexander College</td>
<td>Removal of fixed retirement age; flexible working</td>
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<td>McDonalds</td>
<td>Flexi-working (‘family &amp; friends’ contract); awareness and celebration campaigns; staff training and development; research with Lancaster University on links between business performance and age profile of employees</td>
<td>2011</td>
<td>EFA Award winner 2011 (Best Private Sector overall / Innovation) Research carried out by Centre for Performance-Led HR (CPHR) at Lancaster University</td>
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<tr>
<td>Office for National Statistics</td>
<td>Removal of fixed retirement age; positive retirement courses for staff; flexi-working for work-life balance (including caring responsibilities); health and well being support to staff</td>
<td>2011</td>
<td>EFA Award winner 2011 (Best Public Sector overall)</td>
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| Marks & Spencer   | Removal of fixed retirement; consistent performance management across all ages | 2011 (updated)    | DwP Age Positive: see copy of ‘Good practice case studies: Managing without a fixed retirement age’ document, Jan 2011  
This guide also includes a selection of other employer short case studies.  
[Note: M&S are currently developing further information on their employer experience for an updated case study – expected for Autumn 2011] |
| British Library   | Age Action Group established and comprehensive updates to policies       | 2007              | Employers Forum on Age case study                                                                                                           |
Case study extracts from other sectors

McDonalds – Hospitality sector

EVIDENCING FINANCIAL BENEFITS FROM AGE DIVERSITY

McDonald’s has delivered conclusive proof of the business case for employing older workers. In recent research, conducted by the Centre for Performance-Led HR (CPHR) at Lancaster University, data from between 300 - 400 McDonald’s restaurants was analysed.

Key metrics including complaints, guest count, sales, food cost, profitability and customer service feedback, along with results from the McDonalds annual employee survey, were considered.

Four key themes emerged:

➢ Effective engagement
➢ Fairness and respect
➢ Goal awareness; and
➢ Customer orientation

Links were established between increased levels of customer orientation and effective engagement.

Results were cross referenced with the age profile of the restaurants involved. This demonstrated a clear correlation between top performing restaurants and those with a broad and older age profile.

Anecdotal feedback about the higher quality of service, reduced employee turnover, positive guest comments and the calming, supportive and counselling role older employers provided to younger colleagues, supported these findings.

The implications of increased salary and payroll costs associated with longer service and retention were then calculated and showed that a predicted 11% increase in wage costs was offset by increased sales.
Older workers – a practical example of recruitment and retention

Aim
➢ To be an employer of choice to attract, recruit and retain a high performing workforce, thereby increasing efficiency and enabling maximum return from tight resources

Approach
➢ Total wellbeing management for all employees to enhance quality of service delivery and good employee relations

Strategies
➢ Staff engagement and wellbeing group, which is composed of employees of all ages, which enables improvements in working life
➢ Flexible working options, including flexible retirement and role re-specification to reflect
➢ Performance management – rigorously enforced
➢ Sickness management

Results
➢ Retention and recruitment for skills and experience – 38% out of 700 employees are over 52; 20% of new recruits between April 2010 and April 2011 were over 52
➢ Older workers are motivated to learn and develop. 54 workers over age 64 participated in training over a six month period.
➢ The ‘older’ workforce did not take disproportionately more sick leave than those in younger age groups (despite the 52-55 age group being proportionally the second largest age group of all employees in the Trust)

Epping Forest FE College – Education sector

Epping Forest College recognises that the stereotypes and myths about older workers are misleading and can create barriers to their continued employment. Negative perceptions can also mask the qualities they bring to the workplace and the extent to which they are valued by colleagues, managers and customers. The college counters any negative perceptions by highlighting their positive attributes and contributions to the organisation. In particular, the college values its older staff for the quality of their work and their reliability.

“Some people think that workers have more sick leave, including long-term sick leave, high levels of absenteeism and are less reliable as they get older. In fact, we have found the opposite” (HR Director)
Changing expectations around older worker performance

Wakefield College has worked hard to counter inconsistencies in the performance management of older workers. The college found, for example, that staff approaching 65 were not performance managed as effectively as other age groups because it was expected that they would be leaving the college soon. Where negative perceptions were held by some line managers, these had a marked effect on older workers’ expectations and their performance. Such perceptions may have also contributed to their decision to leave the college on reaching the retirement age.

“Previously good employees (older workers) saw a dip in performance towards the end of their career. It was inexplicable the way competent staff appeared to be less competent within such a short period of time. The college now manages performance equally across the board and all staff are performance managed in a consistent way. Training and awareness-raising for managers helped to explain age issues and remove any unconscious bias, to ensure that staff are managed fairly.”

The college addressed the issue through its communications to line managers about succession planning and career planning. That was supported further by training for line managers and supervisors to raise their awareness and highlight issues relating to age and ageing in the workforce, challenging stereotypes and dispelling myths about older workers. This is currently reinforced with briefings and legal updates and the benefits are shown in the improved performance records of older workers who are now supported more effectively.

ONS – Employers Forum on Age Award winner 2011: Best Public Sector Overall

Currently 45% of the 3,900 ONS staff and 74% of 1,200 field staff are aged 50 and above. This figure has stayed relatively stable despite the recent period of spending cuts and limited recruitment. ONS values its older workforce. They implemented a no default retirement policy in advance of the legislation in 2010; offering a ‘positive retirement’ course to all staff above the age of 56.

ONS has an open flexi system, staff have flexibility to manage and balance their lives, including their caring responsibilities. ONS has people working over 150 different working patterns and is very positive about accommodating flexibility wherever possible.

In recognition of their ageing workforce they have paid attention to the health and wellbeing of staff, establishing a Health & Well-being group in October 2009. The group has set up free health checks, free flu vaccinations, gym facilities, delivered training and other health promotion activities. Their people engagement survey results showed that: 77% of ONS staff say they achieve a good balance between work and their private life; staff aged 65 and above scored this question 8% higher than other staff.

Judges’ comment: “The Office for National Statistics entry shows good examples of proactive policies that attract and retain older workers. They have excellent outcomes with high employee engagement and lots of activity to ensure they are taking care of their staff.”