

Valuing Experience

a practical guide to recruiting and retaining older workers

What they say:

"The experience and knowledge of older workers is too important a resource to ignore - all the time, not just when skills are scarce".

Phil O' Reilly , Chief Executive
Business NZ

"Understanding the work issues that older workers face is fundamental to creating better work that is attractive to a valuable part of the workforce".

Richard Wagstaff, Vice-President
NZ Council of Trade Unions

"It is critical that all employers understand changing workforce dynamics and respond positively to them to maximise good employment outcomes".

Peter Townsend, Chief Executive
Canterbury Employers' Chamber of Commerce

"The guide is important to help employers enhance the potential of older workers and it will help mature job-seekers overcome the current barriers to getting decent work".

Dr Judy McGregor, Equal Employment Opportunities Commissioner
Human Rights Commission

"Income in later life is important for a comfortable and secure retirement. Working longer if you want to is part of preparing financially for a good retirement".

Diana Crossan, Retirement Commissioner

"Recent EEO Trust research shows that older workers are highly valued by employers for their reliability, work ethic, experience, expertise, stability and loyalty. This guide provides inspiration and practical ideas to employers wishing to add value to their business by recruiting and retaining older people".

Dr Philippa Reed, Chief Executive
EEO Trust

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Introduction

If you ask employers if they employ older workers, increasing numbers of them will cite an example of a 65-year-old woman they employed last year who has become an important member of their team, or the valued 69-year-old man who is still working for them. These are typically individual success stories; stories that are visible because they are exceptions.

What is still rare are the employers who take a deliberate and proactive approach to recruiting and retaining older workers, employers who accept older workers as a normal and valuable part of their workforce.

This guide, developed by Top Drawer Consultants, is for employers who want to actively tap into the full labour market, including older workers; for employers who want to ensure their older workers can fully participate and contribute; and for employers who want to retain all valuable employees, regardless of their age.

The guide is based on the experience of New Zealand employers. We would like to thank the Southern Cross Medical Care Society, Fulton Hogan, New Zealand Post and Ministry of Social Development who chose to participate in a year-long project to identify and address issues related to older workers that were specific to their organisations. We would also like to thank a wider group of employers who were willing to share their thinking and experience about issues of recruiting and retaining older workers. These companies include CentrePort, ACC, ANZ National, New Zealand Racing Board, Genesis Energy, O-I New Zealand, Department of Internal Affairs, Lyttelton Port of Christchurch, Department of Conservation, Orion and New Zealand Customs Service. This guide reflects their thinking and their questions, their successes and their challenges, and particularly the lessons they learnt.

Part A – Overview

Who are our older workers?

Employers define ‘older’ in a range of ways. The most typical definition is ‘55 years and over’. However, this varies in different sectors. In sectors where there are heavy physical demands, it is more likely that they are thinking of workers aged 50 and over. In high-earning professions, where significant numbers of people are choosing to step away from their full-time jobs in their fifties, fifty also is seen as a benchmark for categorising older workers. Some organisations think about ‘older’ as people in the last five to ten years of their paid employment. Others do not think about age, rather length of service.

Organisations find it useful to define ‘older’ in a way that is relevant to them to help them monitor their workforce and carry out workforce planning. Apart from that, the definition will not necessarily be very important.

What proportion of the workforce are older workers?

The overall profile of New Zealand’s population is ageing due to declining fertility, ageing of the baby-boom generation and an increase in average life expectancy. This ageing is also reflected in our workforce, of whom half are over the age of 40. This is projected to lift to 42 by 2012, and then remain about this level. Currently people aged 50–64 comprise almost a quarter of the total workforce.

Labour shortages that are already being experienced by significant numbers of employers are expected to become more widespread as baby-boomers retire and other countries with similar issues compete for New Zealand workers. Employers who have largely ignored the potential of older workers in the past, will need to quickly learn how to tap into this section of the labour market for the future.

Why are people working longer?

As our population ages, people are working longer – some by choice and some by necessity.

- **People are living longer, healthier lives**
Increasing numbers of people have sufficient health and fitness to give them a real choice about continuing to work. This has been helped by technological changes that mean in many jobs the physical demands have lessened.
- **People need money to support themselves**
With the prospect of living longer, and wanting to live these years actively, people also need to earn sufficient money to support themselves and possibly other family members. Changes in education and health costs mean that saving for retirement may have been postponed or need to be done concurrently with, for example, supporting children through study, or supporting elderly relatives needing institutional care.

- People want the stimulation and company that can be found in the workforce. Even if there is no financial imperative to continue to work, many older workers do not want to give up the stimulation, company and sense of contribution they have found in paid work.

Characteristics of older workers

Older workers are as varied in their aspirations, abilities and availability as any other group of workers. One of the themes that will echo throughout this guide is the need to take care to not make assumptions about older workers because of their age.

The variations among older workers mean that they are unlikely to respond in a uniform way to initiatives, options or strategies that employers use to attract and retain older workers.

Should we call them ‘older workers’?

Many people are sensitive about their age. Having their age highlighted in the workplace, or being referred to as ‘older’ is the last thing they want. Some employers have used terms such as ‘mature’, ‘ageing’ or ‘life-experienced’ to soften the age implications. ACC decided to just talk about ‘plus 40’ and let people self-select as to whether the initiatives they were talking about were relevant to them.

The term ‘older workers’ is useful for analysis, policy making or general discussion of the issue. Care should be taken, however, in applying it to individuals, or asking people to identify with the label.

Why are employers increasingly thinking about this issue?

Although some organisations are encouraged to think about older workers through the course of their workforce planning, for many there are other triggers.

- Senior managers or HR managers realising that this is an issue for them personally
- People finding themselves going to lots of retirement morning teas.
- A group of key staff retiring at a similar time
- Individual older workers trying to work full-time when their health is making it difficult
- When work gets harder or customers are lost because a valued staff member has retired.

Companies that go from thought to action, however, identify clear benefits for their organisation. The companies we spoke with had a range of reasons for actively seeking to recruit and retain older workers. Their reasons were specific to their individual situations. These were influenced by the nature of their work and customers, the sector they operate in, their geographical location and ownership structures, their past employment practices and organisational history. Although

most of them believed it was also a socially responsible thing to be doing, for none was this the prime reason. Motivations were:

- Coping with skill shortages

These were typically employers which had already encountered difficulties in employing people for specific roles or for specific locations and believed they could no longer ignore a potential skill source.

- Retaining skills and knowledge

This was one of the most common motivations. They wanted to keep the employees they had already invested in, particularly those who had demonstrated their loyalty to the employer and who could do the job well. This was a general concern for most employers, but for some it was an issue for specific roles, teams or occupational groups.

- Managing succession

These companies want to plan for, and as far as possible, manage the succession in key roles. To help them do this, they have found it useful to stretch the process of people retiring from the workplace at the same time as they take deliberate steps to ensure knowledge transfer and develop the skills and confidence of employees who may step into the roles.

- Encouraging full contribution

These employers were clear that they needed to get the best from their employees, regardless of their age. They acknowledged that the 'one-size-fits-all' approach they have sometimes used in the past does not always work well for their older employees.

- Preventing physical or emotional burnout

These employers typically value the contribution and loyalty of their older workers and want to retain them. However, they are aware of the risk to their employees and to the company if they expect them to work in a way that is either detrimental to their health or beyond their fitness levels. It forces the company and the employees to rethink the way they work.

- Understanding and meeting the needs of customers

Some had a strong preference for having older workers well represented in their teams. The New Zealand Racing Board has learnt to value the patience and rapport that older workers in its Call Centre have with their older customers.

- Strengthening and stabilising teams and workforce

CentrePort has found that the influence of informal leaders in their workforce, typically older employees, has been invaluable for steadying teams or helping younger workers get back on track.

- Ensuring continuity and sustained results

In work where it takes a long time to develop expertise and to implement programmes, it can be very damaging to lose critical employees for any reason. Employers such as the Department of Conservation have found that being flexible about how older employees work can allow them to continue to tap into their expertise.

- **Maintaining key relationships**

Professional firms have long known that when key personnel retire they are vulnerable to losing clients. The issue of maintaining relationships with customers, suppliers and partnership organisations is relevant to many other organisations as well. Having older employees continuing to work for the organisation, albeit in a different way, can help maintain these key relationships.

- **Maintaining credibility**

Having older workers who are known for their depth of experience, wisdom and ability to problem solve can help maintain the organisation's credibility with customers, employees and other stakeholders.

Organisations which are clear as to why they want to recruit and retain older workers are much more likely to be successful in doing so.

How old should your workforce be?

There is no 'correct' answer to this. It will depend on which of the benefits listed above are relevant to your organisation. Some organisations such as ACC are deliberately working to match the age profile of the workforce in their geographical locations to ensure they tap into available talent. Other organisations may find that the age profile of the sector they work in or the key occupational groups that they employ are of more relevance to them. For others, the nature of their work or client base might suggest that they would benefit from a higher proportion of older employees. Almost all, however, benefit from having a broad mix of ages amongst their employees.

Key principles for effectively recruiting and retaining older employees

Although companies had different motivations for and responses to recruiting and retaining older workers, the successful organisations all followed some similar principles. These organisations:

- Treat people as individuals – one size rarely fits all
- Deliberately consider the needs of older employees and make sure that policies and practices work as well for them as for younger employees
- Involve older workers in decisions that will impact on them
- Provide a space for safe conversations and problem solving about people's situations and aspirations
- Equip managers and supervisors to initiate and participate in these conversations
- Use multi-faceted communication strategies, but whenever possible include face-to-face communication as a communication strategy
- Develop a culture that values age and experience
- Prevent problems rather than respond when they occur.

Part B – Deliberately positioning your organisation to employ older workers effectively

The organisations which have had the most success in working with older workers to meet their company's needs have followed a very deliberate approach.

1. *Identifying what they wanted to achieve*
2. *Understanding what the specific issues are for their organisation*
3. *Getting leadership commitment to address the issue*
4. *Working in partnership with their employees and/or their union to explore the issue*
5. *Developing a practical response to the issue that was relevant to their organisation*
6. *Implementing that response*
7. *Checking the results, and when necessary adapting the response*
8. *As necessary, repeating steps 2 to 7 either to develop the response further or to spread it wider in the organisation.*

In some cases, such as ACC, this has been part of an organisation-wide strategy. In others it has been tightly focused on a specific part of the organisation, such as in New Zealand Post when it addressed issues for some Post Shop managers as a preliminary step to across-the-board changes in the organisation.

In all cases, however, organisations were clear that a deliberate and comprehensive approach was needed rather than just responding to the needs of individuals, or putting a band-aid on specific problems.

This section of the guide provides ideas for working through these steps.

Identifying what you want to achieve

Both international research and New Zealand experience clearly indicate that programmes that are explicitly linked to organisational objectives or needs are much more likely to be fully implemented and sustained. They have to help the organisation in some way.

You may find it useful to consider the list of what other companies were trying to achieve that was discussed in the previous section. Which of these goals are most applicable to your company? Which are most likely to get the support of leaders in your organisation? Which are most likely to encourage sustained action?

What do you want to achieve?

- *Cope with skill shortages*
- *Retain skills and knowledge*
- *Manage succession*
- *Encourage full contribution*
- *Prevent physical or emotional burnout*
- *Understand and meet the needs of customers*
- *Strengthen and stabilise teams and workforce*
- *Ensure continuity and sustained results*

- *Maintain key relationships*
- *Maintain credibility.*

These are discussed in more detail in Part A.

In some cases this will be about minimising risks for your organisation; in others, about maximising opportunities. Objectives related to minimising risks are often good for getting things started. Maximising opportunities is often about taking things further.

Understanding what the specific issues are for your organisation

Knowing who is in your organisation

Some of your most useful information will come from understanding the current age profile of your organisation and how it is likely to look in the future. Large employers are likely to have the resources to do more sophisticated workforce planning, but it will be useful for all organisations to answer the following questions.

1. *What is the current age profile of your workforce?*
 - *For the organisation as a whole?*
 - *For different parts of the organisation?*
 - *For different occupational groups in the organisation?*
 - *For men and for women in the organisation?*

It is useful for your profile to include age brackets, for example 40–49, 50–59, 60+, as well as average ages. If possible, compare it to earlier years, being careful as to the conclusions you draw if your organisation is small – even one or two people can change the picture significantly in smaller organisations.

2. *How does the age profile of your organisation compare and who is it most useful to compare your organisation to? Is it the:*
 - *Workforce as a whole?*
 - *Workforce in your region?*
 - *Age of people working in your sector?*
 - *Age of people in different occupations?*
3. *How many people are likely to retire in the next few years?*
 - *What is the typical retirement age in your organisation?*
 - *If people continue to retire at that age, how many are likely to be leaving the organisation in the next five years? The next ten years?*
 - *Are there any areas of the organisation, including teams and occupations, where a high number of people are likely to retire at a similar time?*
4. *Is the number of people who are likely to retire going to be the same as the number of people you are going to have to recruit?*
 - *What is the current staff turnover in your organisation?*
 - *Is this turnover going to be significantly increased by the numbers of people who are likely to retire within the next five years?*

- *Are there any areas of your organisation where you are experiencing difficulties in recruiting?*
 - *Do any of these areas have significant numbers of people who are likely to retire in the next ten years?*
 - *What are the most significant gaps that you are likely to have to fill due to retirement over the next few years? If it takes a long time to fully train or develop the expertise required by your staff, you may want to take this projection out further.*
5. *Are you actively tapping into the full labour market?*
- *What is the age range of the people who have been appointed to your organisation in the last 12 months?*
 - *What is the average age of the people who have been appointed to your organisation in the last 12 months? If known, how does this compare with the past?*
 - *What is the age range of people you have appointed in areas where recruitment is difficult?*
 - *If age is known, are you attracting applications from a wide range of ages?*
6. *Do your older workers stay?*
- *Leaving aside people who retire, are there any differences in the turnover of different age groups in your organisation? For example, are people aged between 30 and 39, any more likely or less likely to leave compared with people between 50 and 59?*

This information will help you identify what issues may be most important for your organisation and which need to be tackled first or you need to explore in more depth.

If you want to compare the profile of your organisation with that of your region, Appendix A: Getting Demographic Information will help you get started.

Some organisations find it useful to also examine the age profile of their customer base. Is this changing? Do they have employees with the knowledge and skills to work effectively with them?

How do older workers experience your organisation? What do your existing information sources tell you?

Before collecting any additional information, review any existing information that may enable you to answer this question. Possible sources, if they include analysis by age, are:

- Exit interviews
- Engagement or 'climate' surveys
- Review of organisational systems or practices, e.g. performance management
- Customer feedback
- Delegate or union feedback
- Record of complaints
- Promotion outcomes
- Uptake of benefits or options
- Participation in training.

Getting leadership commitment

It is difficult to start responding to issues relating to older workers if leaders do not understand the issues, see the benefits of addressing the issues and want to do something about them. Without leadership commitment it is almost impossible to sustain any response or initiatives. All of the participating companies were clear that this does not work if it is, or is perceived to be, an HR initiative or just someone's good idea.

Which leaders need to be convinced? This will depend on the scope of the issue and the response that is likely to be needed. In some cases it will be the whole senior management team, in others it may only be the managers in the relevant area.

Working in partnership with your employees and/or their union to explore the issue

It is important to fully understand the issue and your employees' experiences and expectations before responding. Organisations have found it useful to do this in conjunction with their employees and/or their union. Not only are they more likely to get accurate and useful information, but also support in implementing solutions. This may occur through active consultation or through the establishment of working groups that include representatives of HR, older workers and unions.

Using surveys to explore the issues in more depth

One technique for exploring the issues in more depth is to use a survey. Our thanks go to the Ministry of Social Development who developed a detailed survey, and to Fulton Hogan and New Zealand Post who pared it back to suit their employees. We have included Fulton Hogan's version at the end of this publication for you to adapt

for your organisation. This was used successfully with front-line roading and construction staff.

Based on the experience of the project participants and other companies, if you choose to use a survey it is important to:

- Make sure that the relevant decision makers want to know what their employees think before undertaking a survey
- Undertake a survey only when you know the organisation will have the capacity to respond to the results
- Carry out the survey in a way that is comfortable and appropriate for your employees and will encourage their participation
- Take time to thoroughly plan the communication and implementation of the survey
- Provide feedback on the results and what the company is planning to do about them.

Other strategies for exploring issues

Surveys are not the only possible strategy for understanding people's work aspirations and retirement intentions. Genesis Energy has found it useful to encourage managers to carry out retention interviews with staff on a regular basis. This gives them an opportunity to explore people's work aspirations and, where relevant, their retirement intentions. It enables them to be proactive about finding solutions that will work for the employee and the organisation to retain employees.

Other possible options include:

- Focus group interviews
- Forums and discussion groups of interested people
- Individual interviews of a representative sample of older employees
- Talking with a range of managers to ensure you understand the issue from their perspective.

Developing a practical response

There is no one way to develop a response to this issue. However, the organisations that have been most successful have found it useful to develop a cohesive multi-faceted approach. Some do it under the umbrella of a specific policy on older workers, others don't feel the need for a policy but develop a cohesive strategy for recruiting and retaining older workers. Some choose instead to systematically apply the 'lens' of age to their general policies to ensure they work for all employees.

The following explores some of the questions organisations had to consider in deciding which approach was most relevant to them.

How explicit do we want to be about focusing on older workers?

It is useful to focus attention on older workers to raise awareness of the issues and prompt action. However, your responses to the issue must be lawful. The Human Rights Act (1993) includes age as one of the grounds on which direct and indirect discrimination is unlawful. Since 1999 there has been no upper age limit for age discrimination, and hence compulsory retirement is unlawful. As well, you cannot replace discrimination against older workers with discrimination against younger workers.

As part of a multinational company, ANZ National work closely with their global parent on their talent-management practices. The Australian business has recently taken steps to provide workers over the age of 50 with an automatic right to increased flexibility. ANZ National has explored this programme's merits for local use and have adapted it alongside New Zealand legislation. ANZ National's approach to flexible work is not targeted at a specific age group – the focus is on providing all staff with options to discuss and agree flexible working arrangements, while ensuring business outcomes are met.

Nor do you want to disadvantage older workers with an explicit focus on their age. If the organisation is not genuine in valuing older workers, this could make them more vulnerable. Focusing on older workers is useful for analysis, policy making or discussing the issue generally, particularly in larger organisations. Take care, however, in applying the term to individuals, or asking people to identify with the label.

Many organisations find it useful to develop strategies that encompass the whole of people's working lives, whilst acknowledging that people's aspirations, needs and expectations will vary at different ages. This is their rationale for putting a specific focus on the needs of older workers, particularly when it is a group that has been neglected in the past. In focusing on older workers though, you will need to make it clear that this is not at the expense of other employees.

How proactive do we want to be?

Put simply, there are three different levels that organisations typically work on to address this issue.

1. Preventing discrimination

This is the most basic level. It requires organisations to ensure that none of their policies and practices either directly or indirectly discriminate against older workers. Although few organisations deliberately discriminate, some practices can unintentionally discriminate. There may not be a policy that says that older workers can't access training, but managers' attitudes and practices may result in only younger workers getting the opportunity. It may be that all employees are expected to undertake a regular assessment of their physical fitness and strength, but if aspects of the test have no relevance to the actual work, then older workers can be disadvantaged. A discrimination prevention strategy requires regular reviewing, and if necessary adjustment, management practices related to recruitment, selection, training, performance management and promotion.

2. Ensuring the full contribution of your current workforce

This requires ensuring that older workers can fully contribute to and participate in your workplace. It means that you have to go beyond a 'one-size-fits-all' approach to deliberately structure policies and practices so that they work just as well for older workers as they do for younger. The focus is on equal opportunities for employees, not necessarily treating everyone the same way.

As well as making sure that selection, performance management, training and promotion practices work for older workers, an environment should be created that values the experience and contribution of older workers and encourages them to participate. It may mean considering the way that work is organised or jobs are designed, designing wellness programmes to be inclusive of the needs of older workers and ensuring social activities are not all geared around your younger workforce.

3. Capitalising on opportunities

This is the most proactive level. Organisations which decide to deliberately improve their recruitment of older workers are operating at this level. This does not mean that they will only employ older workers, but that their recruitment processes are deliberately inclusive, and that their recruitment strategies include mechanisms that older workers are more likely to respond to.

Organisations that put in place phased retirement programmes alongside knowledge transfer processes are operating at this level. This is about finding win-win solutions for the older workers and the organisation, whilst creating opportunities for younger staff.

These levels are not distinct alternatives, but building blocks. You can't work effectively at the third level, without also doing the first and second. There is no point in trying to recruit older workers if they do not feel valued by the organisation and subsequently leave. There is no point in setting up a phased retirement programme, if you undermine the message by ignoring the input of older workers.

How do we want to position our response?

Again, organisations do this in different ways.

- **A stand-alone programme**

This has a deliberate focus on age. Sometimes on age generally, sometimes specifically focusing on older workers.

- **Part of a diversity strategy**

ACC started by developing a specific Age Management Strategy, integrating this with their Equal Employment Opportunities programme.

- **Part of a work-life balance strategy**

Many of the things that older workers are looking for in the workplace do fit comfortably under the work-life banner: flexibility in hours, job design and leave.

Care is needed, though, to not assume that the type of flexibility that is needed in this area will necessarily be the same as it is for people with, for example, young children.

- **Part of a general workforce management strategy**

In organisations where staff are not comfortable with a specific focus on age this can be useful. However, care will be needed to ensure that the needs of older workers do not get lost or overlooked. It requires a deliberate application of the age 'lens' to all policies and practices as well as to the monitoring of outcomes.

- **Part of a flexibility strategy**

The Ministry of Social Development is considering including older workers in the response they are making to the Employment Relations (Flexible Working Arrangements) Act. The Act requires employers to consider requests for flexible working arrangements for people who have caring responsibilities. This will apply to some older workers who may be caring for partners, elderly family members or grandchildren. The Ministry, however, is thinking about going wider than this and ensuring that all older workers, regardless of caring responsibilities, have the same opportunity.

In deciding which approach is most appropriate for your organisation, consider:

- Which will have the most credibility and acceptance?
- Which will provoke the most interest and action?
- Is there a synergy to be gained in linking the issues?
- What fits best with your organisation's commitments and priorities?

Do we need to do anything new?

Before developing any new responses, take a good look at what is currently in place. Your organisation may already have policies or provisions in place that simply need to be communicated better. There may already be examples of good practice in different areas of your organisation that just need to be spread wider.

Implementing that response

Good implementation of your response to older workers will require many of the same things as the good implementation of any initiative or strategy. The companies involved in this project, however, emphasised two things that they found to be particularly important in this situation.

Preparing HR

Having an HR team or key manager that understands the issues relating to older workers is seen as critical. They need to be able to constructively challenge negative stereotypes. They need to be able to encourage, equip and support managers and older workers to have safe conversations about the aspirations and needs of the older worker and the company. They need to be able to help them find practical solutions that work for the employee, the manager and the company.

Equipping managers

The most important factor in older workers' experience of your organisation is likely to be their manager or supervisor. Yet it is not always easy for managers and supervisors. They may not know what is possible; the needs of older workers may be beyond their personal experience. Some of the conversations that are needed may be difficult. Strengthening the awareness, knowledge and skills of managers to recognise and respond to issues for older workers is seen as critical.

Checking the results

As well as checking whether your organisation's response is effective, it will be important to keep an eye on what can be a changing picture and monitor the developing profile of your organisation. You will need to periodically check on the needs and expectations of your older workers, which will be influenced by what the organisation does, but also influenced by personal circumstances, social attitudes and trends, community services and facilities, and the overall economy. Your company's response will need to be a flexible one.

Part C – Key dimensions of recruiting and retaining older workers

What works as far as recruiting and retaining older workers? A useful starting point is what older workers tell us they want.

A 2007 UK survey of 1,000 older workers found that older workers are most interested in:

- Flexible working arrangements
- The opportunity to use existing skills and experience
- A worthwhile job
- More flexible leave arrangements
- Financial benefits that they value
- A participative and friendly culture.

There are some marked similarities in the responses of New Zealand workers as identified in the 2007 EEO Trust survey, where people identified the following, in order of importance:

- Quality part-time work and flexible working hours
- Ability to take extended leave and then return
- Ability to work from home
- Higher pay
- Challenging, interesting and varied work
- The chance to make a difference
- Having their experience needed and wanted
- Less stress.

The following section provides ideas and suggestions on how you as an employer may influence some of these. It focuses on the recruitment and selection of older workers, designing jobs that will work for older employees and ensuring the participation and contribution of older employees.

Recruitment and selection

Employers chose to work at three different levels in this area.

1. Removing unnecessary barriers
2. Making sure they are giving older workers a fair go
3. Actively tapping into that part of the labour market.

Currently most employers are working at the first two levels. Increasingly, though, they are starting to think about how they might move to the third.

Removing unnecessary barriers

This is basically about making sure your policies and practices are legal. Recruitment and selection is the area that the Human Rights Commission receives the most age discrimination complaints about. Employers are finding that they need

to take deliberate and ongoing steps to ensure that they are not putting in place unnecessary barriers to the appointment of older employees.

Unnecessary barriers can arise in different areas.

Job requirements

- Focus on the skills required rather than assuming where these skills may be found. If you need people to work effectively with young customers or clients, do not assume younger workers will be able to do this and older workers will not.
- Make sure that any physical requirements are directly relevant to the work.
- Focus on what needs to be achieved, rather than how it has been done in the past. Older workers may have learnt different but equally valid ways of doing things.

Recruitment messages

- Make sure that advertisements and job descriptions do not include explicit or implicit references to age. This may be in the wording or images. It can be useful to check out recruitment messages with a range of people of different ages to get their impressions on what kinds of people you seem to be looking for and what kinds of people you are trying to discourage. The message may not be what you intended.
- Make sure that people handling enquiries and applications talk about the role and the expectations in a way that does not discriminate against older workers. Explicitly state that the company will seriously consider all applications, regardless of age. It may be useful to have them rehearse how they might respond to queries to ensure that they are not unintentionally sending a negative message to older applicants.
- If you use recruitment consultants, be explicit that the company is interested in skills, not age. Be careful that you do not give them the impression that you are looking for people in any particular age bracket.

Selection panels

- Make sure all people involved in your selection process understand their legal obligations and how intentional and unintentional discrimination can occur.
- Prepare and check the questions that selection panels intend to use to ensure that they do not suggest that the company is not interested in older employees.
- Include a prompt in the decision-making process to check that the panel is focusing on skills to do the job and not age.

Giving older workers a fair go

This is about ensuring that the people involved in the recruitment and selection process are actively open to considering the employment of older workers.

Broaden your recruitment approach

- Make sure you advertise in places or ways that will also reach older employees. ACC has found it effective to advertise in community newspapers. Others have found it useful to use a network approach that includes asking their current older employees to talk to other people they know that might be suitable for the role.
- Make sure that any pictures you use in advertising or promotional materials also include older people.

- Be explicit in your recruitment messages that you are interested in whether people can do the job, not their age.

Consider older workers for different types of work

- Consider older workers for areas where you may have only employed students in the past, such as includes seasonal or part-time work.
- Consider older workers who may appear to be overqualified for the role. Genesis Energy has found that older workers who genuinely want to reduce their work demands and understand the potential frustrations that may occur, have ended up being valuable employees.

Actively tapping into the older labour market

Some employers find it useful to actively tap into the older part of the labour market. This may be a general policy, particularly when there are skill shortages. It may be for specific roles or in specific locations, or it may be to complement an existing team. Genesis Energy has found this a useful strategy for introducing maturity and experience into a young team.

Strategies for doing this include:

- Working in partnership with community organisations. This has been done more often internationally than in New Zealand, but interest is growing.
- Targeting specific media. Ask newspapers, magazine or websites about the demographics of their readership. Find those that match your needs.
- Checking that any recruitment consultants you use have strategies for tapping into this part of the labour market.
- Profile the achievements of older employees in local media.
- Ensuring that you include older employees in frontline roles within your organisation or in any publicity or promotional materials. If people see employees who they identify with, they are more likely to consider applying.
- If being able to work effectively with older clients or customers is an important part of the job, this should be stated in your job description and advertising.
- Actively promoting your company's openness to working in alternative ways.
- Refer to options in your recruitment materials such as medical insurance, superannuation contributions or the ability to negotiate additional leave that may appeal to older workers.

Designing work for older workers

Sometimes older workers can't work the way they may have been able to do when they were younger. Sometimes they simply no longer want to. This may be due to the personal costs of working that way, or because they are now in a position to make choices and they are doing so.

Ensuring that work is less taxing in the way it is organised and carried out will be good for older employees. Usually it will be good for others as well.

Physical demands

Some jobs are physical and always will be so, requiring strength, resilience and stamina. However, organisations are becoming increasingly smart about reducing or managing these physical demands so they reduce the risk of injury and physical burnout whilst being more likely to retain the experience they need. People are then able to keep on doing the job as they age without the personal costs.

Techniques used by these organisations include:

- Increased use of equipment
- More effective training on techniques for doing the work in a less physical way
- Increased safety measures
- Better pacing of work and use of breaks
- Planning work to spread the physical demands
- Giving workers longer periods to recuperate
- Using teams to carry out work so the load can be spread and the specific skills of individual team members better utilised
- Getting older workers to undertake more maintenance or planning work, where their experience and problem solving can be utilised with reduced physical demand
- Pairing older workers with younger workers, who can learn from the older worker's experience, whilst shouldering a greater burden of the physical demands.

Genesis Energy has successfully used this last technique, pairing younger maintenance people with older engineers. They are clear though that both partners need to be able to contribute in a meaningful way. It has to be real work. This is important so that the younger people do not feel unfairly treated and the older people still know they are making a genuine contribution.

Physical environment

Even where work is not physically strenuous, it can still place physical demands on people. Working in noisy environments, sitting long hours at a computer, repetitive movements. Good ergonomic design will help prevent many problems that in the past have restricted older workers from continuing in specific roles. There is also an increasing array of technology, often at fairly minimal cost, for addressing difficulties associated with hearing, sight, mobility or computer usage. Better understanding of exercise and stretching also helps, along with encouragement from employers to incorporate this into the work day.

Workloads

Workloads and working hours can also discourage older workers, workers that employers want to keep and find hard to replace. This is not about keeping employees to maintain numbers. It is about finding ways that employees can stay and want to stay, whilst maintaining their energy, enthusiasm and interest. Approaches used by these employers include:

- Reviewing the work demands – how tasks need to be done, when they need to be done and even if they need to be done

- Using team work to spread the responsibility and allocate work to suit people's individual strengths
- Adjusting working hours to avoid peak travel times, and hence shorten people's working day
- Reorganising hours to give people greater recuperation time, such as nine-day fortnights
- Finding opportunities for people to work from home
- Providing people with greater choices in shifts and rosters so they are more likely to find a work pattern they can sustain
- Making greater use of part-time work and job sharing
- Bringing in additional workers to relieve pressure and to plan for succession.

Shifts and work patterns that have suited your employees in the past, may no longer be as satisfactory to them as they get older.

Stress and emotional pressures

Cumulative stress and emotional pressure can discourage some older workers from wanting to continue in roles where they have contributed successfully in the past. Those who have options may choose to do other things. Those who don't, may no longer be able to sustain their enthusiasm or performance. Either way, employers lose. Strategies used by employers to find mutually beneficial solutions for the company and the employee include:

- Providing opportunities to allow them step back from the pressures, either for a specified period of time or permanently. Examples include: undertaking key projects; relationship roles where the employee's experience is valued, but the pressure is not as great; or trouble shooting or quality control roles where their experience is utilised, but the day to day pressure is reduced.
- Utilising experienced workers in coaching, mentoring or development roles.

Such strategies as these have been used successfully by Orion to hold on to specialist engineering knowledge.

These strategies can be applied reactively when problems arise, but they are more likely to be effective and accepted when they are proactive – planned in advance and put in place early.

Structuring jobs for older workers

Once organisations can accept that there are other valid ways of working apart from the conventional 40-hour week, the alternatives are numerous. Sometimes organisations structure work in this way to meet the particular needs of a current or recent employee. At other times employers will use it as a deliberate strategy to meet the needs of a particular situation or to attract applicants from the wider labour market.

Possible options

- Part-time or job share

There are many variations of this. Part-time may involve reduced days, reduced hours or splitting customer bases or tasks. Sometimes there are greater costs associated with having work done by part-time or job-share employees. There can be costs in supplying safety gear, in providing furniture and equipment. These need to be put beside the potential savings from retaining staff and helping employees continue to perform. When CentrePort did the sums on the costs of introducing job sharing in frontline wharf roles they were clear that the benefits outweighed the costs.

- Reduced hours

This might involve shorter days or shorter weeks. Common patterns are five six-hour days, or four days a week.

- Part-year or seasonal work

This is a useful strategy for matching staffing levels to busy parts of the year, or times when other staff are more likely to want to take leave. Employers cited numerous examples of older workers who liked to work through the summer if they could take the winter months off to travel or visit family, those who wanted to be able to take ski season off, those who knew that there was certain parts of the year they found more difficult with their health when they preferred not to work. This may suit some older people who have retired, had the break they had long been anticipating, and are now ready to meet a new challenge.

- Extended leave

This is a variation on the previous option. People are employed in conventional arrangements but with the option of 'buying' additional annual leave, usually as a trade for salary. The difference with this is that people can then negotiate to take that leave at different times during the year, whilst maintaining a steady income level.

- Casual or relief

The organisations who work this option the most effectively actively work to build an ongoing relationship with the workers. They want them to feel part of the place, that they belong. It is a good option for people who have been permanent employees who know the job and organisation, want to retain some involvement, but no longer want to or need to work on a regular basis. CentrePort's casual pool is a mixture of retirees and young people looking for a way into a permanent role.

It can also be a good option for older workers who are new to the organisation but want to try out the work, or just work on an occasional basis.

Some companies find it useful to cement the relationship either through guaranteeing a minimum number of hours per week or per month, or combining it with part-time work.

- Project

Rather than employing people on a permanent basis, the employment is project by project. This is particularly suited to people with specialist skills, who also want the independence to choose when they work. Projects may involve working full-time for a

period, or a fixed number of hours spread over several months depending on the needs of the project.

- **Consultancy**

This typically suits the experienced, skilled employee who knows the company well. They come in on an occasional basis to provide advice or assistance. It is a good way to retain access to specialist knowledge that is not easily replaced.

Phased retirement programmes

Some employers have pulled together elements of the above to make up a programme specifically designed to help people in the transition to retirement. For example CentrePort has a policy allowing everyone who has worked for more than 30 to reduce to 24 hours a week while still receiving their full-time employer contribution to their super scheme plus a lump-sum payment upon retirement. They estimate that this will amount to an extra 19 weeks' pay. They are still eligible to work overtime if they have times when they want to earn extra money. Their strategy has been designed to retain people they may otherwise have lost.

Employers who want to implement these kinds of programmes need to consider:

- Who will be eligible?
- What are the possible arrangements that can be considered?
- How do people apply?
- What level of superannuation contribution is the company prepared to make? Full-time or pro-rata?
- How long can people work the alternative arrangement? Is it open ended or is it for a fixed period of time?

Making it work

Many employers we spoke with had occasional ad-hoc arrangements using some of these alternatives. Often they had been very successful in individual situations. However, they also spoke of the risks of this being left to the grace and favour of individual managers, with the associated risk of resentment by other employees. They warned of managers and staff not knowing what the possibilities are and what they might entail, with the possibility that some employees leave unnecessarily and others enter into unsatisfactory arrangements. They also recounted stories of managers entering into arrangements that were contractually difficult. A more systematic approach would be better. There are a number of steps it is useful for organisations to go through.

Putting in place Flexible Work options



Putting in place flexible work options

1. Seek the 'buy-in' of the relevant managers

What would help them? What would they find difficult? What would make it easier?

2. Enlist the support of the union

They will often know what employees are interested in and what difficulties many need to be resolved. If there need to be adjustments to contracts, it is better to have them involved early so they can work with you to find solutions.

3. Assess which options might be possible in your organisation

Find out what is currently done or has worked in the past. Identify any constraints on what may be possible, including contracts, work schedules and accommodation. Companies that are administered using a strict head-count system rather than using budgets or full-time-equivalents to determine staff levels may find it difficult to implement some of these options. Identify any options that are not going to be possible.

4. Decide what framework you want to operate from
Is this something that is to be offered to all employees; open to all employees but promoted more strongly to older workers; to specific areas of the organisation; or just to those employees who have reached a specified number of years of experience?
5. Find out what might interest your employees
Of the options that might be possible, check whether they would encourage employees to stay longer with your company. Be careful at this stage to be clear that you are investigating possibilities, not making promises.
6. Learn from experience
If managers and employees already have experience of implementing these options, talk with them about what worked, what was difficult and what is needed to make it successful. If the options are new to your organisation, you may want to trial them first in a few places so you can learn from this experience.
7. Put in place the administrative arrangements needed
The options may require some additional administration or different ways of handling them. Check out what is going to be needed and enlist the support of the people who will be involved in handling the administration. Don't forget that even though the benefits for the organisation may be considerable, you may be making their job harder.
8. Develop tools and processes that can be used by current employees to negotiate these options
You need employees to actively consider not only which option would suit them personally, but what the impact would be on their work and their customers, their colleagues and their manager. The more you can help employees to assess the possibilities, constraints and possible solutions prior to raising the issue with their manager, the easier it will be to negotiate a successful outcome.
9. Equip managers
Use the lessons learnt to equip managers to negotiate and implement these options successfully. This may include guidelines, case studies, coaching or training.
10. Promote the options to employees
This will be an ongoing process. Successful strategies for doing this include using stories of those who have used the options, including information about the options in career and/or life planning seminars and pamphlets that people can take home and discuss with the partners and families.
11. Keep the relationship strong
The success of arrangements where people are not employed on a permanent and regular basis, is dependent upon the company maintaining a relationship with the employee. They need to feel that they are still part of the place. This might be through including them in training or social events, even if this is not a time they are usually working; keeping them up to date with what is happening through newsletters, e-mail updates or inviting them to briefing sessions; involving them in celebrations and farewells; ensuring they have the opportunity to participate in any consultation processes.

12. Use the options to help you recruit

Many of these options may be attractive to people who had not considered working for your company before. Use them to your advantage.

Your organisation cannot guarantee that it can find a solution that will work for each employee, but it can guarantee to give it serious consideration and where possible find a solution that works for them and for the company.

New Zealand Post is currently working through this process with some of their Post Shop managers in the South Island. They are trialling a range of different arrangements so they can deliberately learn from this experience. In doing so, they are finding that the trials, or 'case studies' as they are calling them, are helping to provide evidence that different arrangements can work, as well as building the confidence of managers and employees. Where difficulties or questions have arisen in earlier trials, they are deliberately tested in subsequent trials. Every person participating in the trial is asked to keep a weekly journal of how it is going – what is working, what is difficult, and what documentation or tools would have helped make it easier. To date they have been pleasantly surprised at the results. It has been much easier than anticipated. Some of the interesting lessons they have learnt to date include:

- Interest levels have been high but not as many people as anticipated want to take up the options immediately. All are clear though, that they really value having options when they are ready. It has already encouraged at least one valuable employee to stay who was planning on leaving.
- Knowing that options will be available is helping employees plan.
- The administration of it has been much less difficult than anticipated. Very few new administrative processes or documentation have been identified as needed.
- "It has opened people's minds – we can do things differently."

Helping people through transitions

Employers can help and encourage their employees to make sensible decisions and to plan for the future by providing:

- processes that encourage managers and employees to have conversations about the future on a regular basis so that solutions can be found that work for both the company and the employee
- access to health and workplace assessments so that employees can make informed and responsible choices about matching their health and fitness levels appropriately with work patterns
- life and retirement planning advice and information that helps people start preparing well before they need to retire.

Orion use an external company to provide a programme called 'Re-careering'. This is a development opportunity aimed at older workers "looking to redefine the meaning and place of work in their lives as they move into a new stage of their lives". Many companies that provide these kinds of options find it useful to extend the invitation to spouses and partners as well.

CentrePort has offered pre-retirement seminars for some time, but takeup was not high for operations people, who have little experience in going to seminars. They

have targeted some key people from the wharf to attend and think that their enthusiasm for the seminar will 'spread the word' that it is a useful thing to do.

Be careful in assuming what people will find useful. New Zealand Post started this project by assuming that the group of staff they were working with would want access to retirement and life-planning seminars. When they surveyed staff, however, they found that although people did have some interest in these things, it was far from their top priority. They were much more interested in having their work valued and having greater flexibility in the way they worked. New Zealand Post therefore decided to meet the needs of people who did want the retirement and life planning information by developing their intranet to provide links to useful sites, and instead focus on other priorities.

Effective supervisors and managers

Companies involved in this project were clear that their supervisors and managers were the greatest asset they had in recruiting and retaining older workers, and, at times, their biggest hindrance. Their good managers respond to the individual needs of all of their workers, including their older workers. Some managers, however, can be clumsy in managing older workers. They may try and treat them the same way as younger workers. A lack of confidence in managing older workers can come across as patronising or dictatorial which irritates older employees who may have been doing the job or been in the organisation much longer than their manager. Some managers may shy away from talking about difficult issues. Others may be overwhelmed or occasionally bullied by older workers.

What skills and knowledge to supervisors and managers need?

To work effectively with older workers, supervisors and managers need to:

- Understand and be sensitive to the aspirations and needs of older workers
- Be able to participate in safe and constructive dialogue about these aspirations and needs
- Be aware of how assumptions and stereotypes about age can get in the way, and have strategies for minimising the chance of this happening
- Be able to build cohesive teams
- Develop a culture of respect and professionalism
- Be aware of and open to flexible ways of working, and have practical strategies for implementing them.

Equipping supervisors and managers

Organisations can support managers in this situation by:

- Incorporating an awareness of difference, including age, into management and leadership training, and induction training for managers
- Providing them with tools to help them hold career discussions, consider requests for flexibility and effectively manage different working arrangements
- Providing them with individualised coaching
- Creating safe processes for employees to give managers feedback

- Providing them with examples and case studies about how different situations have been managed effectively
- Facilitating processes where they can talk with and learn from more experienced colleagues.

Genesis Energy is clear that the key to success is managers having open conversations with their employees. Their HR team has begun having quarterly meetings with each of their managers to support and coach them in managing their employees, specifically including their older workers.

ANZ National see leadership learning as one of the most important things they can do to support managers' performance and create high-performing teams, and have developed a mechanism for identifying and incorporating new talent management challenges into their learning. Multi-generational leadership challenges are coming up increasingly.

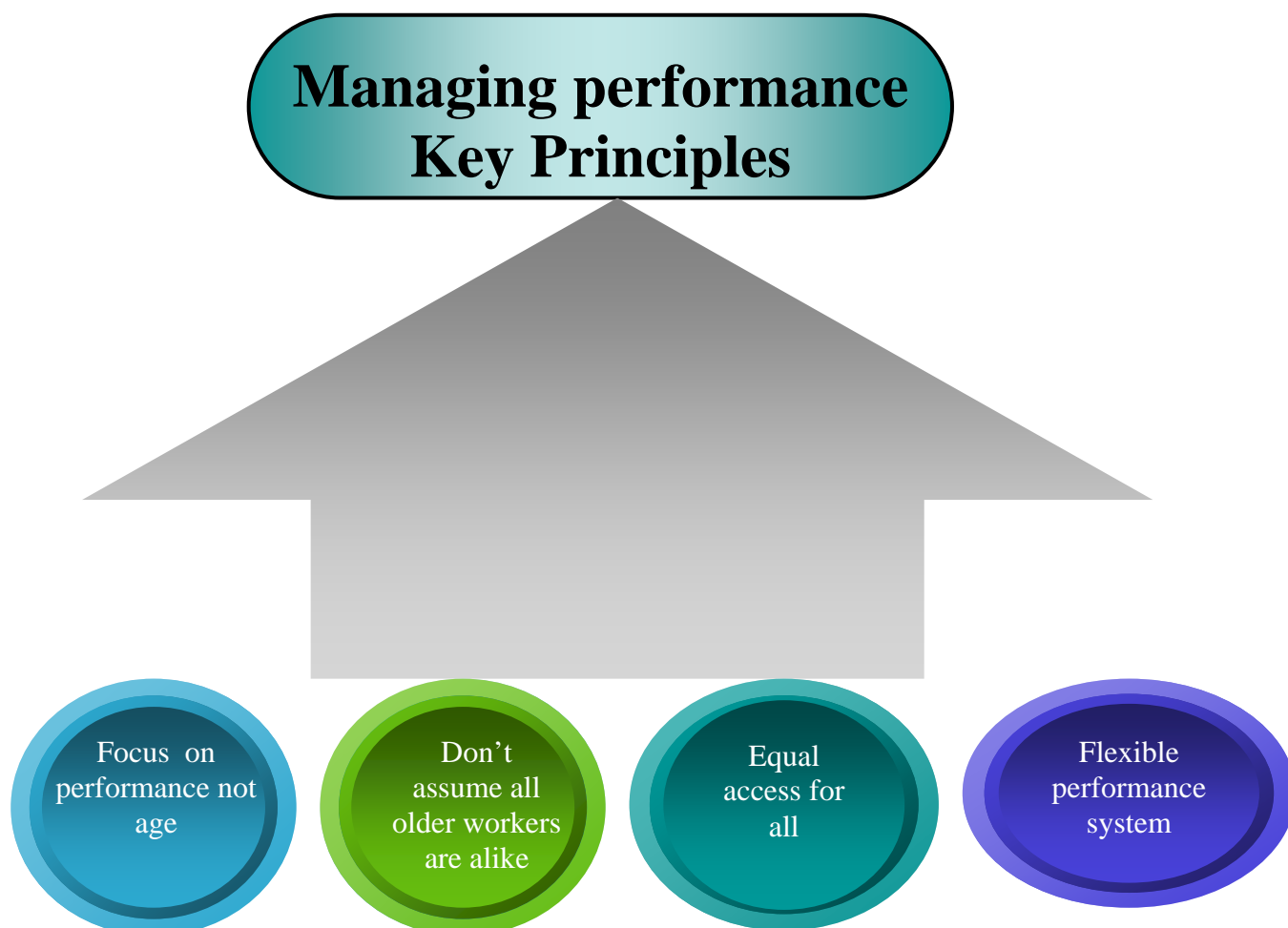
ACC has found it useful to reinforce the organisation's expectations of managers by including an overt emphasis on diversity management, such as what steps they have taken to recruit and retain older workers, within managers' performance guidelines.

Managing older employees – Advice for managers or supervisors

Do:	Avoid:
<ul style="list-style-type: none"> • Acknowledge the wealth of experience they bring – both work and life experience. • Consult older employees about decisions that affect them. • Listen carefully to their views. • Ask them to share the lessons they have learnt from their past experience – both what worked and what did not. • Involve them in finding solutions to today's problems or issues. • Give them credit for their suggestions. • Introduce changes as building on the past, not simply replacing it. • Involve older employees in planning for the future. • Treat them with dignity and respect. 	<ul style="list-style-type: none"> • Dismissing things as old-fashioned. • Inferring that the way things were done in the past was always wrong. • Inferring that because they are older they must be set in their ways and unable to change. • Inferring that because they are older they will not be interested or will find it difficult to learn new things. • Assuming that they will not be interested in new technology or new ways of doing things. • Assuming that because they are older they will not have any fresh ideas. • Not giving feedback because it may hurt their feelings or embarrass them.

Managing performance

Like all employees, older workers need to know what is expected of them, whether they are on the right track, and to have their contribution acknowledged and rewarded. The companies who have been successful in the performance management of their older workers apply some similar principles.



Key principles

Focus on performance, not age.

The issue is whether employees have the skills, knowledge and motivation to do the work, not how old they are.

Do not assume that all older workers will be alike.

There is as much variation in skills, productivity and aspirations amongst older workers, as there is between older workers and any other age group.

Ensure that people have equal access to opportunities, regardless of age

Older workers should have equal access to training and development, promotions and rewards as other workers.

All aspects of the performance management system need to be sufficiently flexible to cater for the diversity of employees

To get the best from all employees, systems need to be sensitive to variations in employees' confidence, personal circumstances, career aspirations, learning styles, and what will motivate them. Systems that are designed, intentionally or unintentionally, to meet the needs of the 'average' employee may be ineffective for many older workers.

What to watch for at each stage of the performance management cycle

Being clear about what is expected

Effective performance management relies on organisations and managers being clear with their employees about what is needed for the company and the employee to be successful. This may be spelt out through competencies, performance objectives or goals and targets. Whichever approach you use, to ensure these expectations are fair for older workers, check your systems for the following.

Any physical requirements are justified

When developing competencies, check that any competencies related to physical strength, fitness or speed are directly related to the requirements of the job. These will need to be monitored regularly as technology and work strategies change.

Do not assume that there will necessarily be only one way of achieving a particular outcome

Older workers may have developed alternative strategies for coping with tasks that require physical strength or endurance. Check rather than assume there is only one way of achieving something.

The competencies or outcomes cover all key aspects of the job

Older workers are often valuable in organisations or teams because the mentoring, coaching or on-the-job training they provide to other colleagues. If this is a contribution that is needed and valued in your organisation, ensure that it is included in the competency or outcomes framework that your organisation uses.

If relevant, include the skills or competencies required to work effectively with older customers

If older people are a significant part of your customer base, then you will need to ensure that you have sufficient staff with the skills, knowledge and attitudes to understand their needs and work with them effectively. If these requirements are not made explicit, it is more difficult to manage staff performance in this area.

Not all older workers will be good at this. Nor can you assume that younger staff will not. It is more likely, however, that older workers will have these skills, knowledge or attributes.

Negotiating fair and realistic performance expectations

The process of negotiating performance expectations with individuals and/or teams is critical in ensuring there is an agreed understanding of what is expected. The issues for older employees are not very different than those for younger employees, but some issues are more likely to arise for older workers. As well, what may be issues for some older workers, will not necessarily be issues for all of that group.

This may be new for some staff

Active performance management where employees are expected to have a role in negotiating appropriate performance expectations may be new for some older staff.

A common response is “If I have never done it in the past, then what is the point of doing it now?” Strategies for getting their commitment to the performance-management system include:

- Including older staff who have credibility with their colleagues in any project teams involved in designing or reviewing the performance-management system.
- Consulting all staff, including older staff, when designing or reviewing the performance-management system.
- Providing all staff, including older staff, with training on the performance-management system and their role in it.
- Emphasising that the system applies to all staff, not just selected groups.
- Explaining the benefits of the system for employees.
- Giving staff the opportunity to openly discuss their concerns before implementing the system.

Negotiating performance expectations may be intimidating for staff who have not done it before. Strategies for supporting employees who are unfamiliar or uncomfortable with the process include:

- Train managers well in recognising people’s discomfort and what they can do to minimise it.
- Provide employees with training.
- Get a more experienced or confident employee to coach them through the process
- Allow them to bring whanau or support people to the discussion
- Let them negotiate their expectations jointly with a colleague.

Some organisations have found it important to not use the terminology often associated with performance management. Instead they encouraged their managers to just have conversations with their older employees about what they wanted to do in the next few years and what they would need to enjoy work.

Older workers may want to “down-shift”

These workers may want to:

- adjust their time commitments, e.g. work part-time or reduced hours
- reduce the work pressure, e.g. work in less stressful areas or reduce their targets
- change the nature of the work they are doing, e.g. do less travelling, do less physical work and more coaching and training.

This may be to cater for other interests or obligations, e.g. family or community responsibilities, for health reasons or as a bridge to retirement.

Care is needed in raising these issues to ensure that it is a meaningful discussion, and that employees do not interpret it as an indirect or direct threat to their employment. If they do, their response may be to take a complaint of age discrimination.

Do:

- Ask open questions, e.g. what are your career goals for the next period of time? Ask these questions of all employees, not just older workers.
- Encourage them to come up with possible options, e.g. what might be the best way of achieving this?
- Encourage them to identify any potential difficulties this would cause for them, the organisation and their colleagues, e.g. what impact would this have on the rest of the team?
- Consult others who might be affected by the options they want to pursue, before making any decisions.

Many employers find it useful to give all staff access to information or seminars on preparing for retirement. Do not assume that only older workers will want this information. This encourages employees to reflect on their own needs and plan ahead. If they plan ahead and are happy to let their employer know how their plans may impact on their employment objectives, it makes it easier for the employer to also plan.

Assessing performance

People often consciously or unconsciously make assumptions about older workers. Care is needed to focus on actual performance and not be influenced by assumptions or stereotypes related to age. When assessing the performance of older workers, particular care is needed to avoid assuming that older workers will:

- lose memory and mental functioning as they get older
- be resistant to change
- not be able to relate to younger people
- not be interested in career progression
- not be interested in learning new skills or trying new ideas.

Organisations can minimise the risk of these assumptions and stereotypes about age affecting judgements about performance by:

- ensuring that clear performance objectives are negotiated that are related to the task, not people's age
- using forms, guidelines and information packs that make it clear that all staff are expected to think about their career aspirations and their training and development needs
- providing managers with training that alerts them to these assumptions and stereotypes, and encourages them to reflect on their own practices
- equipping all staff, including older staff, to be active partners in the performance-management process.

Addressing deteriorating or poor performance

If older workers are not performing, this needs to be addressed as it does for any poor-performing employee. This is important for the organisation, for other colleagues and for the employee. It is usually easier to respond to performance issues earlier rather than later.

Address the cause

Poor performance can be caused by organisational or individual issues.

- **Physical environment**

For older workers, look in particular for physical environmental issues such as lighting, noise, unnecessary lifting or inefficient work-flows. Solutions may be as simple as putting in brighter lighting, changing the work-flow patterns or providing trolleys or lifting equipment. These measures are likely to improve the health and safety of all employees.

- **Workplace culture**

Be alert to cultural issues such as older workers being excluded from teams or being bullied. These issues may need to be addressed by appropriate team building, by managers confronting inappropriate behaviours or by general training and awareness. Consult the older worker on what might best fix the situation before choosing a course of action. Some 'solutions' might make the problem worse by putting undue emphasis or focus on the employee's age.

- **Employee's personal circumstances**

The employee's personal circumstances – for example, family demands, health issues or financial difficulties – may be affecting their performance. Ensure that employees can access any support programmes that the organisation provides such as Employee Assistance Programmes (EAP) or chaplaincy services. Employees may need some additional flexibility of hours or adjustment to the work. If adjustments are made to hours or work ensure that:

- the solutions work for the organisation and the individual
- others who might be affected by the adjustment are consulted before arrangements are completed
- appropriate time frames are put in place for reviewing or terminating the arrangement.

- **Out-of-date skills**

The employee's skills may have become out of date or obsolete. This may require the provision of training or assistance in retraining for a different role. Do not assume that employees will not be interested in further development. Possible solutions include:

- retraining to sharpen existing skills or teach new skills
- encouraging employees to become active in professional organisations
- encouraging employees to take courses to keep up with new developments
- encouraging older employees to consider their career options and develop career contingency plans
- holding career planning workshops

- Employee's physical strength or health

In some cases they may no longer be physically able to carry out the tasks that they are responsible for. Continuing to try to do so may be putting the employee's health at risk, and possibly the safety of others.

This may require adjusting the hours or work as discussed earlier, in the section on structuring work for older workers. Discussion of these issues is easier when the employee recognises the problem themselves. Employers can help them do this through providing access to medical and workplace assessments. This is discussed in the later section on health and wellness.

- Employee's attitude

The problem may be the employee's personal attitude. In particular, watch for boredom, coasting or loss of interest. Possible solutions may include:

- being explicit about what is expected of the employee
- reassuring the employee of the importance of their contribution
- adjusting the mix of their work responsibilities
- job rotation
- involving them in coaching or mentoring other employees
- involving them in special projects.

It may be useful to talk through with the employee what their future career plans are, and if appropriate work with them to build a constructive path to get them there, whether it be to shift into another role, into another way of working, or make a transition to retirement.

- Career plateauing

This can occur when employees quit trying or let up when there is little probability of promotion. Possible strategies for keeping employees engaged are:

- giving them projects that use their special skills
- using performance conversations to alert employees of problems on the job
- providing alternative career paths
- providing opportunities for training and development
- setting up a system of calling for expressions of interest when significant projects are being planned, so people can signal their interest in being involved.

- Career burnout

Career burnout is caused by emotional and physical exhaustion. It is commonly found in jobs with intense pressure and limited support systems.

Look for excessive absenteeism, uncharacteristic poor attitude, disregard for the quality of work, and complaints about work overload.

When burnout is diagnosed early, managers can take steps to prevent it derailing careers. Some options are:

- job redesign
- special temporary assignments
- reassignments as mentors or trainers
- stress-management training
- sabbatical leave.

When a solution can't be found

There will be times when a mutually acceptable solution cannot be found.

Employers may need to 'exit' employees who are physically unfit to perform their duties if:

- the level of physical fitness is a genuine requirement of the job;
- performing the duties without the required level of fitness could risk harm to the employee or others and it is not reasonable to take this risk.

The employer must ensure that they could not reasonably take other measures to reduce the risk. Some employers at this stage chose to make individual arrangements with these employees to ease the transition.

Where employers find it most difficult, is when a longstanding employee is finding it difficult to perform yet needs to continue to earn. Employers want the employee to retain their dignity. They want other employees to see them treating older workers with respect. But the employment relationship cannot continue, at least in the same way.

Once the situation has arisen, there is no avoiding the hard conversations that are required. Increasingly employers are trying to be proactive so they are less likely to have to have these conversations. They are doing this by putting in place:

- a range of ways that employees can work, so people are more likely to find something that works for them and the company
- processes that encourage managers and employees to have conversations about the future on a regular basis so that steps can be taken early to avoid or minimise difficulties
- access to health and workplace assessments so that employees can make informed and responsible choices
- life and retirement planning advice and information that helps people start preparing well before they need to retire.

Training and development

Effective training and development is important for all workers, but it is particularly important for older workers so they can keep their skills up to date, build or maintain their confidence and continue to be engaged. This will also benefit the organisation.

Ensuring access for older workers

Older workers need to have equal access to training and development opportunities to maintain skills, careers and productivity.

It is useful for employers to monitor who gets training and development in their organisation. International studies indicate that older workers do not receive the same level of training as younger workers. Feedback from employers and employees suggest that it may be similar in New Zealand. There are two possible causes for this.

1. Older workers do not have access to training and development opportunities

Given the age discrimination provisions in the Human Rights Act, there would be few organisations in New Zealand that have explicit rules or policies excluding older workers. However, access can be limited in more subtle ways.

- Only younger workers get picked or recommended for training and development
- Managers assume that older workers will not be interested in training and development and hence do not provide them with the relevant information or encourage them to participate
- Training opportunities are limited so the emphasis is placed on people at early stages of their career
- There are assumptions that older workers will find it more difficult to learn, so it is not worth the organisation investing in their training and development.

The experience of some organisations overseas that have targeted their recruitment at older workers, is that older workers give them a greater return on their training investment than younger workers. Tesco, the UK retail chain found that the retention rate of older staff who completed training programmes significantly exceeded that of younger staff.

2. Older workers do not take up the opportunities that are provided

- They may lack the confidence to take up opportunities
- The way that training and development is delivered may be off-putting for them
- The timing and location of the training may be difficult for them due to their personal circumstances
- They have been given the impression that younger employees are more deserving.
- They have been doing the job for a long time and do not feel the training being provided adds anything new.

If employers want to involve older workers in training and development opportunities, it is important that they understand anything that is discouraging their participation.

Encouraging participation

Companies use a range of strategies

- Having an explicit expectation that all employees will undertake relevant training and development. In some cases this is part of their employment agreement, in others it is part of their performance management or career-development programme.
- Actively demonstrating that training and development is valued. If there is a direct correlation to performing the job better, it may be useful to tie it explicitly to remuneration.
- Assessing how well managers encourage training and development for their staff within the manager's performance assessment.
- Ensuring that training and development is delivered in a way that works for older workers.
- Encouraging and supporting individual older workers to take up the opportunity, particularly if they have not had recent experience in a training situation.

Ensuring training and development is effective for older workers

Design

Care will be needed to ensure that the training and development strategies used by the organisation match the learning styles of the individual worker. Studies suggest that some older workers will need longer to learn new skills, but that they tend to grasp and use these skills more fully in the long run.

Studies also suggest that older workers are more likely to respond to:

- self-paced learning
- on-the-job coaching
- pragmatic application-orientated training.

This matches the experience of New Zealand employers. ACC has found that on-the-job training that is grounded in reality works particularly well. Genesis Energy found that engineers who needed to update skills and knowledge for new technology responded best when they were given the opportunity to learn at their own pace.

Care is needed to not buy into stereotypes about older workers. Genesis Energy knows that there is a myth that older workers are not as quick with technology "but that is not our experience".

Learning environment*

Learning environments that are effective for older workers are likely to also benefit all employees. It is useful to:

- Provide audio and visual learning materials designed to compensate for any hearing or sight loss older persons might have. This is especially important when using slide or taped presentations, videotapes, films or flipcharts
- Use large, bold, dark print on flipcharts
- Reduce glare
- Keep a consistently high level of light on the screen when showing films, videos or slides

- Post training materials at eye level (for those wearing bifocals)
- Be sure that there is no distracting background noise.

Training techniques*

- Relate new learning to trainees' past experiences
- Help each trainee to transfer and translate current skills to the new skills being learned
- Stress the relevance and application of training issues
- Allow for participation and interaction among learners by using problem solving, case studies, role playing, and practice sessions
- Eliminate time-pressured situations. Encourage self-pacing. Allow trainees extra time to practise alone
- Use handouts, memory aids.

Training delivery*

Organisations need to select trainers and presenters who can work effectively with diverse audiences, who can understand and respond to the needs of both older and younger workers. Effective trainers will be able to adapt their material and delivery to different audiences.

Trainers and presenters will find it useful to:

- Use good diction
- Speak clearly at a lower range and a natural rate of speech
- If there are hearing-impaired persons, seat them up front where they can see the speaker's face
- Provide encouragement, assurances, and reinforcement often.

ACC has found that the selection of the trainer or facilitator particularly important. They have found trainers who operate with a facilitative style that supports and encourages without being patronising, are more likely to be effective.

* These are adapted from advice given by the American Association of Retired People

Motivation and rewards

All employees will perform better if they feel their work is valued, including older workers. To effectively motivate older workers, it is likely you will need to ensure they have meaningful opportunities to participate and a combination of formal and informal recognition and rewards. The recognition and rewards that are most effective match people's needs, interests and preferred styles. This section explores some of the participation, recognition and reward strategies that have been found to usually work for older workers. Care is needed, however, to not assume that all older workers will be the same.

Do not assume that the motivation of older workers is just an issue for the older workers. Organisations have learnt to their cost that when their older workers are disenchanted, this will typically affect all other employees. One employer commented that the first indication they had of a morale problem with older workers was an increase in the turnover of their younger staff. The younger employees were looking at the older and saying 'if this is what happens to you when you work here, I don't want to stay'.

Creating a culture that values age and experience

If people do not genuinely feel that age and experience are valued in the organisation, then whatever else you do to motivate or reward performance is likely to be undermined. It is useful for organisations to ask themselves the following questions:

- What is the age range of our managers?
- What is the age range of our new recruits?
- Who is appointed to key project groups?
- Who is advice sought from?
- Who does the interesting jobs?
- Who is promoted?
- Who is profiled in our newsletters or publicity?
- Who speaks for our organisation?
- Who are seen as the 'heroes' or 'stars' of our organisation?
- Who attends our social events?

If older people are not regularly included in your answers, your organisation may unintentionally be sending a message that it does not value older workers. This may be reinforced by the humour, language and images that are used. It may be being fostered by the type of events that occur.

Managing change

Older workers are sometimes perceived as resistant to change. This is likely to be the case for some individuals, but often it is the way change is managed that alienates older workers.

Too often when changes are being introduced they come with an explicit or implicit message that what was done before was wrong, old fashioned or out of date. For workers who may have developed or implemented the earlier approaches, this is often demotivating. If instead, changes or developments are presented as building on past experience, taking things to the next stage, or responding to changed circumstances, the contributions of long-serving employees can be acknowledged and their experience used to help shape the future.

Leaders who want to inspire enthusiasm for the future and new ways of doing things need to ensure that their messages will resonate with older workers as well as younger workers. The messages may need to be different. One employer reflecting on an unsuccessful change process realised that whilst their younger employees responded to messages of being up-to-date with technology, increased efficiency and being a sector leader, their older workers seemed to become more resistant. It was only on investigating this later, they realised that what motivated their older workers was different. They were open to using new technology, but only if they could see how it would improve the service to their customers. In itself, new technology did not excite them. Leaders and change managers may find it useful to use focus groups or reference groups of older workers to ask for suggestions, to check what would convince them about the need for change and to test ideas and communications.

Recognition of contribution

Recognition of their contribution is very important for many older workers. They want to feel that what they have done has made a difference, that it has been useful and that it has been noticed. This recognition is particularly important in motivating people who have been in the role for a long time, or whose career has plateaued, whether by choice or otherwise.

Strategies that employers have found to work well include:

- Informal thanks from their manager and leaders of the organisation
- Deliberately passing on positive feedback from customers
- Acknowledging the contribution of individuals when projects or accomplishments are being discussed or written about
- Letters of recognition and thanks at crucial milestones or the completion of key tasks or projects
- Profiling people in staff newsletters or websites
- Ceremonies to mark people's contribution, whether in a low-key manner over a staff morning tea, or more formal celebratory occasions.

CentrePort decided one way that they could acknowledge the contribution of long-term employees was when they were revamping the staff cafeteria, to put a display of photographs of the company's history and some of the key people who had contributed.

Rewards

Rewarding teams

As organisations put increasing emphasis on teams, rewards, in particular informal rewards such as events or outings, are sometimes given to the team as a whole. If the team includes older workers, care is needed that the selected reward is appropriate for them as well as for other team members. Some physical or social activities may isolate the older worker and act as a demotivator. Make sure that all staff will be comfortable with an event or outing that is suggested as a reward.

Rewarding individuals

Effectively acknowledging the good performance of older workers requires managers treating all of their staff as individuals, and remembering that their needs will vary. In determining what reward or recognition strategies are likely to be effective for older workers, managers need to consider the following:

- Their family responsibilities

Older workers may be responsible for family members such as grandchildren or elderly parents or partners, and may value increased flexibility in their working hours or the ability to take time off for particular events such “grandparents’ day” at school.

- Financial situation

For some older staff, bonuses or salary increases will be important as they save for retirement. Others may place greater value on having additional leave for travel or other interests.

- Interests

If organisations use rewards such as vouchers or gifts to recognise good performance, make sure that the ones given to older workers are relevant to their interests and needs. Ideally, managers will know their staff well enough to know that they are particularly interested in music or gardening, for instance. If not, have the manager explain to the staff member that they have noticed and appreciated their contribution recently and would like to acknowledge it in some way. Have them give the employee some appropriate choices to select the acknowledgement that would be most useful or appealing to them.

The nature and the value of the gift does have some significance, but the real impact comes from the experience it provides and the tangible evidence for the employee and their colleagues, family and friends that their work has been recognised and valued.

Genesis Energy’s approach has been to develop a menu approach to possible rewards. They have found that their older workers are more likely to choose financial rewards or those that more family focused – a weekend away, a meal out with their partner – rather than developmental rewards that are more commonly selected by younger employees.

Health and wellness

A strategy that employers are increasingly using to recruit and retain older workers is a comprehensive health and wellness programme. Their aim is to equip people to make informed and healthy choices. These programmes need to be targeted at all employees, but deliberately inclusive of older employees.

Medical checks

Some employers are providing access to medical checks for their employees. Medical services might be selected and paid for by the employer, with employee's results being sent to the employee's own doctor for follow-up as needed. These can be useful in helping employees assess what they need to do to maintain their health and fitness as well as if and when they may need to adjust their work patterns.

O-I New Zealand is an organisation which has found this useful, although they caution that it can take time for employees to build trust in the process being for their benefit rather than used to restrict or terminate their employment.

Gymnasiums and fitness programmes

These can be useful for older employees as well as other employees. To ensure they work for all it is important in the design of the gymnasium or fitness programme to ensure that deliberate consideration is given to the needs of older workers. At least some of the programme or equipment available needs to be relevant to them.

It is also useful to monitor uptake of these services. Are older employees using these? If not, what might be discouraging them? Possibilities include:

- Perception that this geared at younger employees
- People who run the programmes not understanding or being sensitive to the needs of older employees
- A culture that makes older workers feel unwelcome
- Lack of information or support for adapting programmes safely for individual health and fitness levels.

Comprehensive health and wellness programmes

Southern Cross is half way through a three-year project to assess the impact of wellness programmes on the participation, tenure and retention, absenteeism and employee satisfaction and engagement of their employees. As part of this project on older workers, they have analysed their results to date to examine the experience of older workers participating in the programme.

The programme covers fitness and sports, nutrition and weight management and personal wellbeing. It provides access to a range of health and wellbeing providers on site during work hours, with subsidies and paid time to participate. This includes seminars, sports, weight loss, smoking cessation, doctor's visits and more. It also

incorporates a rewards programme. All permanent staff can receive rewards for taking part in the programme determined by their participation levels.

Their results to date show:

- A high level of participation by older employees, particularly when the programme was broadened out a little more in the second year in response to evaluations and feedback on the first year's programme
- All participants aged 50 – 59 believed that the programme is an influencing factor in their retention at Southern Cross. This did not come through in the same way for employees aged over 60.
- All participants aged over 50 report that their job satisfaction was increased through feeling fit and being involved.

Of all ages, the older workers participated the most in the seminars. The subjects included: stretching, posture and breathing; motivation; nutrition; stress and heart disease; diabetes; and cancer. They also participated to high levels in the 10,000 steps programmes, flu jabs, health expos, health checks and GP visits. Younger workers were more involved in touch rugby, netball, Round the Bays and marathon events.

Accident prevention and absenteeism

One of the most important things employers can do to retain older workers is to have a good health and safety programme. Accident rates and absenteeism are areas where there are sometimes negative stereotypes about the experience of older workers. The experience of employers involved in this project did not match these negative stereotypes.

Genesis Energy found that there is no significant difference in the accident rate between their older and younger workers. They found, however, that older workers may have different types of accidents and their safety awareness differs. In their experience, older workers are better at using safety equipment such as eye protection and gloves and have fewer injury accidents than younger workers. The older workers are more likely to have degenerative issues such as hearing and arthritis.

Many of the employers we talked with found that their older workers took less sick leave than their younger employees, particularly when the one or two exceptions that distorted the picture were taken out of their analysis.

It is useful for organisations to monitor both accident rates and absenteeism, so that if differences do emerge they can be explored and responded to.

Conclusion

Older workers are a valuable resource for employers. Demographic changes, skill shortages, changing markets, the need for increased productivity and the growing demands of just doing business, means that it is becoming even more important to retain the skills, knowledge and experience of your current older employees as well as making sure you don't overlook the potential of older workers when you are recruiting.

It is not just about having older people represented in your workforce. It also means making sure you get the best from them, that they want to stay and that they are enthusiastic about contributing. That requires a deliberate consideration of the needs, aspirations and expectations of older workers, with an ability to recognise and treat all staff as individuals. Inevitably the benefits of doing this for older workers flow on to benefit all other employees as well.

If your organisation has typically designed jobs, work and employment relationships in conventional or traditional ways, this may require additional thought, planning and problem solving. The organisations that are already well down this path, though, are clear about the benefits it is bringing them.

Appendix A: Getting demographic information

1. Information about your area

[2006 Census Quickstats About A Place \(PDF, 279KB\)](#)

QuickStats provide quick overviews of the places in which you live and other places in which you may have an interest. It includes data on age and sex.

2. Projections

a. Regions

<http://www.stats.govt.nz/products-and-services/hot-off-the-press/subnational-population-projections/subnational-population-projections-2006-base-hotp.htm?page=para002Master>

Under the medium series projections, 12 of New Zealand's 16 regional council areas will be home to more people in 2031 than in 2006. Ten will experience population growth throughout the entire projection period. The populations of Hawke's Bay and Manawatu-Wanganui are projected to increase between 2006 and 2026 and then decrease for the remainder of the projection period. The Gisborne region is projected to increase between 2006 and 2021 and then decrease, so that its population in 2031 will be similar to that in 2006. The population of Taranaki is projected to increase between 2006 and 2016 before decreasing. The West Coast and Southland are also projected to have fewer residents in 2031 than in 2006.

The low projection for each region results in seven of New Zealand's 16 regions having more people in 2031 than in 2006. With the high projections, all 16 of New Zealand's regions will be home to more people in 2031 than in 2006.

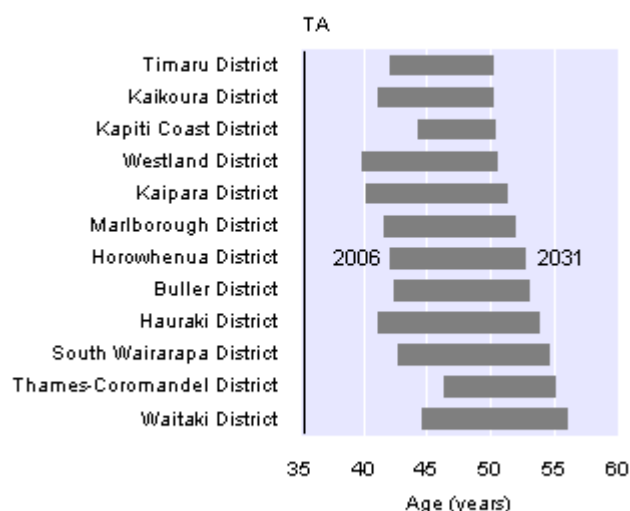
b. Ageing population

The population of all territorial authority areas is expected to be older in future. However, there will be considerable variation between areas, largely because of each area's current population age structure and different fertility and migration patterns. At the national level, the median age (half the population is younger, and half older, than this age) is projected to increase from 36 years in 2006 to 41 years in 2031. At the subnational level in 2006, the median age ranged from 31 years in Manukau and Hamilton cities to 46 years in Thames-Coromandel District. By 2031, the median age is projected to range from 35 years in Manukau City to 56 years in Waitaki District (medium series). A median age of 50 years or older is projected for 12 territorial authority areas in 2031.

The oldest median ages are generally in areas experiencing low fertility and/or a net outflow of young adults (aged 15–29 years) and a net inflow of people aged 35–74 years. The youngest median ages are generally in areas experiencing high fertility and/or a net inflow of young adults (such as cities with major tertiary education facilities).

Oldest Median Age in 2031⁽¹⁾

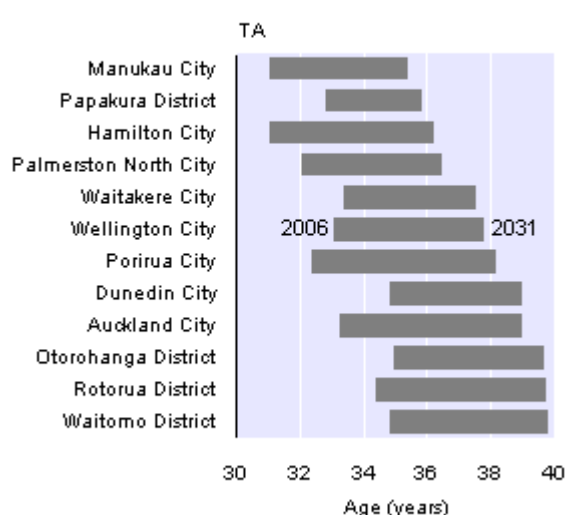
Territorial authority areas



(1) Medium series projections.

Youngest Median Age in 2031⁽¹⁾

Territorial authority areas



(1) Medium series projections.

Work, Life and Retirement Questionnaire

Fulton Hogan wants to take a proactive approach to providing a work environment that attracts and retains staff – especially for staff who may be beginning to think about their retirement years.

This survey asks you about the things that you consider when thinking about leaving paid work and also about the things that could attract older workers to stay with Fulton Hogan.

It will take around ten minutes to complete and is completely confidential. Please do not put your name on it.

Thank you for taking the time to complete the survey. When you have completed it please forward to Tony McCabe at Corporate Office in the attached envelope.

The results if the survey will help Fulton Hogan prepare policies and procedures to support older workers.

Planning for the Future

How much *thought* have you given to when you might leave paid work?

- A lot of thought
- Some thought
- No thought yet

How much general *planning* for leaving paid work have you done?

- A lot of planning
- Some planning
- No planning at this stage

How much planning for *financial independence* after leaving paid work have you done?

- A lot of planning
- Some planning
- No planning at this stage

At approximately what age do you think you might leave paid employment?

Under 50 50 - 54 55 - 60 60 - 65 65 - 70 70+

- I have not decided
- I do not intend to leave paid work

As you move towards leaving paid work do you think you will:

- Gradually move towards leaving paid work
(e.g. change of hours, change of duties)
- Stop paid work completely
- I do not intend to leave paid work
- Don't know / Undecided

Before you leave paid work completely do you think you will:

- | | |
|----------------------------|--------------------------|
| Be working at Fulton Hogan | <input type="checkbox"/> |
| Be working elsewhere | <input type="checkbox"/> |
| Don't know | <input type="checkbox"/> |

Deciding When to Leave Paid Work

Are the following factors important in your decision about when/if you leave paid work?

	Yes	No	Not Sure
Financial security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Responsibilities for whanau/elderly/children/ disabled/ill care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pursuit of leisure activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pursuit of an alternative lifestyle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Specific health issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General health issues associated with getting older	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of flexible work options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeking a different work/life balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When I can't do the job anymore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other reason (please specify) _____			

Moving to Retirement

Would any of the factors influence your decision about when, or if you retire?

	Yes	No	Not Sure
Flexible work conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A change in the type of work I do	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More access to training opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved health provisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting financial advice/information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other (please specify) _____

Background information

This information is for statistical purposes only. You will not be identified.

What is your gender? Male Female

How old are you now?

How long have you worked for Fulton Hogan

Which of the categories **BEST** describes your job?

Operations / Field Staff

Administration

Foreman / Leading Hand

Manager

Other

Many thanks for completing this questionnaire