CENTRE FOR
AGEING
BETTER

Becoming an age-friendly employer
Evidence report

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About the Centre for Ageing Better

The Centre for Ageing Better is a charity, funded by an endowment from the Big Lottery Fund, working to create a society where everyone enjoys a good later life. We want more people to be in fulfilling work, in good health, living in safe, accessible homes and connected communities. By focusing on those approaching later life and at risk of missing out, we will create lasting change in society. We are bold and innovative in our approach to improving later lives. We work in partnership with a diverse range of organisations. As a part of the What Works network, we are grounded in evidence.

Acknowledgements

1. Introduction

1.1 Why being an age-friendly employer matters

Populations across the developed world are ageing while core social institutions (such as schools and colleges, workplaces, and hospitals) are ill designed to serve the population age profiles that are now emerging. Concerns have been widely voiced that the state pension system risks collapse and older people will increasingly face economic hardship as pensions become less generous and savings behaviour remains inadequate. As the 'baby-boomer generation' approaches the end of their working lives, employers face the loss of skills and experience, with implications for national economic performance. In an age management guide for employers (CIPD, 2012:2) the need to accommodate older workers is set out starkly by drawing attention to the impending skills gap: "it is predicted that UK employers will need to fill an estimated 13.5 million job vacancies in the next ten years but only 7 million young people will leave school and college over this period… Increasingly, employers will have to rely on older workers to fill these vacancies".

Against this backdrop, working longer is seen as a key solution. While older worker employment rates have grown since the mid-90s, it remains the case that by state pension age participation rates have dropped below 50% for both men and women (Smeaton, 2012; DWP, 2014), and employment among 55-64 year olds in the UK is below many other OECD countries (PWC, 2017). In response, the promotion of extended working lives remains a policy priority, accompanied by a steadily increasing state pension age and abolition of compulsory retirement (DWP 2014a; DWP 2014b). Extending and supporting longer working lives is consistent with the globally-adopted active ageing agenda, with employment being the first domain of the Active Ageing Index (Zaidi and Stanton, 2015) that is used to measure countries' progress around healthy and productive ageing. In response to the skills deficit challenge, the then Business Champion for Older Workers urged the Government to retain, retrain and recruit older workers (Altmann, 2015), an expression that has become a mantra of policy discussion around age-friendly workplaces.

Working longer does raise several challenges, particularly in sectors where work involves physical labour, low autonomy/routine jobs or shift working. Health and caring factors also become increasingly salient. Alongside supporting people to work for longer, policy must also focus on job quality to ensure working does not become a burden or risk to health and wellbeing later in life. While employers may recognise the need to promote opportunities for older workers, there is limited evidence of what works to bring about age-friendly employer practices.

1.2 About this study

This study has been commissioned by the Centre for Ageing Better as one of a range of projects designed to promote fulfilling work in later life. The report is intended to complement the Centre for Ageing Better's work with employers, and partnership with Business in the Community's Age at Work Campaign, to support employers to take action to make a positive difference to their older employees. Focusing on the theme of age-friendly workplaces, this report explores three topics in particular:

- **Reducing age bias in recruitment (chapter 2)**

- **Promoting good quality flexible work (chapter 3)**

- **Maximising the benefits of age diversity at work (chapter 4)**

Ageing Better recognises that these are important topics in promoting age-friendly workplaces, but are not the only factors. They have in part been chosen because there is a lack of good existing practical guidance available to employers on these three topics in relation to the ageing workforce. These topics have been selected on the basis of consultation with employers, the Business in the Community network, academics, and other stakeholders active in the areas of age and work.

Greater employment participation at older ages since the turn of the century is largely a retention phenomenon: older people are simply working a little longer with the same employer (Smeaton, 2015). The impetus to recruit has not increased to the same extent (Kidd et al, 2012; McNair et al, 2005). Age discrimination can still act as an obstacle to recruitment (Phillipson et al, 2016) with over a quarter of men and women of all ages (26%) reporting that they have experienced ageism (Abrams et al, 2009). Employers and recruiters therefore need evidence-based approaches to help **reduce age bias in recruitment**. For people in (or re-entering) work, **promoting good quality flexible work** is highly valued by older workers and can support people to remain in or re-join the labour market. As older and younger workers increasingly work alongside each other, it is incumbent upon employers to recognise the opportunities, challenges and added value that can be brought by **maximising the benefits of age diversity at work**.

This study used a multi-methods approach including: a rapid evidence review; primary research with employers, intermediaries, and experts; secondary analysis of quantitative data; and an omnibus survey. It was also supported by processes designed to test interim findings and engage with employers' ongoing concerns including an employer summit and two policy roundtables. Full details can be found in Appendix 1: Methodology.

This study explores employers' strategic engagement with ageing workforce issues, assessing age-friendly policy and practice. The aim is to clarify why these three topics are important for employers and the extent to which they affect older workers. This report

outlines, where relevant, evidence on promising approaches, setting out a range of practices that promote age-friendly workplaces.

1.3 Concepts of age, generation, and career stage

In reviewing the literature on workplace age diversity, a wide variety of approaches to the conceptualisation and measurement of diversity were encountered. Some studies focused on age while others differentiated employees according to their generation, with reference to Veterans (born 1939-1947), baby boomers (1948-1963), Generation X (1964-1978) and Millennials (1980-2000). Career stage is a more useful construct when considering how best to meet the needs of and manage employees. In the past, age might have mapped onto career stage in a predictable way but with longer working lives potentially necessitating changing jobs and retraining more often, this link is likely to have loosened. Older workers may find themselves at an early stage of a new career having changed jobs or, increasingly commonly, having started an apprenticeship, with implications for job attitudes which studies have shown vary with career stage (Super, 1984; Flaherty and Pappas, 2002; Kooij et al, 2013).

Age differences

The work orientations, priorities, goals and support needs of different groups may well differ but some researchers have suggested that "chronological age" is an insufficient distinction of such differences in a work setting (Sterns and Doverspike,1989; Lange et al, 2006). Kooij et al (2007), and, for example, differentiate between functional, psychosocial and organisational age:

- **Functional or performance-based age** varies widely between individuals depending on their cognitive abilities, physical health and work context requirements. Individuals age at different rates and the relevance of this ageing process depends on job context.

- **Psychosocial or subjective age**, which relates to how we perceive ourselves or how we look, feel and act which, in turn, are influenced by social perceptions of age and age norms which can shift according to occupation and company and are gender specific. Some occupations are age and gender 'typed' (Duncan 2003), with some positions reliant on superficial or physical attributes (Weller, 2008), as in the following example of a 66-year-old woman contemplating retirement, interviewed for a study of the work to retirement transition (Smeaton, 2016):

"You can't go on forever ... I think at the moment I look kind of okay when I've got make-up on ... but I think there comes a stage when you're not going to look right doing that [job] if you're wrinkly."

- **Organisational age**, including seniority level and age relative to others in the company, which can make people start to feel like an outsider, as exemplified in the following two

quotes from 59 and 61-year-old women planning to retire in the next 12 months (see Smeaton, 2016):

"I get a bit fed up sometimes, because I'm the eldest one there."

"I don't actually realise how old I am until we get more staff joining and I think to myself they're old enough to be my daughter, I can't believe it... when I listen to their chat, I've got to come down to their level... They will make fun of me, they call me Barbie's mother because I wear like pink lipstick and I dress very casual for my age... We joke about it most of the time, it's been fine but you do notice it".

Organisational age can also increase the likelihood of encountering a career plateau which may trigger detachment. Individuals with the same chronological age may therefore differ in terms of health, appearance, career stage, ability to perform work roles and work orientation.

Generational differences

Many studies of demographic change in the workplace have focused on generational diversity, claiming that having four generations working closely together presents new challenges for managers on the basis that each generation has divergent skills, attitudes, needs and expectations (CIPD, 2008). Generational commentary has become widespread in popular management journals (Lyons et al, 2015) but, as noted by Thomas et al (2014: 1576): "there is very little conclusive evidence to back up the popular appeal of distinct generational categories", as these do not adequately indicate diversity within generations and therefore "should play no part in the design and execution of workplace policies".

Parry and Urwin (2011: 92) are similarly critical of theory and empirical evidence relating to differences in work values between generations, concluding that studies have found "more areas of similarity than difference between generations". The growing body of research into generational differences has been criticised on five key grounds (Thomas et al, 2014; Giancola, 2006; Lyons et al, 2015):

- Privileging 'generation' over other aspects of identity downplays variation among particular age cohorts on the basis of class, gender, ethnicity and other forms of social identity.

- To claim that people born within 20 years of each other are likely to exhibit similar attitudes, values and work-related preferences is unconvincing as within-group differences are likely to outweigh differences between generations.

- The generational classification system risks reinforcing stereotypical judgements about different age groupings.

- The temporal clustering of generations can be debated.

- Experiences in formative years such as wars, technological developments and political events, which are thought to shape the outlook of generations, are likely to differ according to class, nationality, gender etc.

As part of the study, employers and expert informants were asked what language they used when considering the issues of age diversity in teams and workplaces. As discussed in section 2.1.2, the language around this issue referred more often to 'generations' than to mixed-aged teams, diversity or intergenerational relations, with employers repeatedly framing discussions in terms of Millennials, Generation X, Generation Y (the generation born in the 1980s and 1990s) and baby boomers. Media influence was acknowledged. Contributors to the study did note that the terminology of generations was an imperfect representation of interests that risked the reinforcement of stereotypes. In keeping with this approach, the report primarily uses the term 'age diversity' but also refers to generations when reporting the views and practices of specific employers and when presenting evidence from the literature which has used such terminology.

2. Reducing age bias in recruitment

Age discrimination can still act as an obstacle to recruitment, with over a quarter of men and women of all ages (26%) reporting that they have experienced ageism (Abrams et al, 2009). Employers and recruiters therefore need evidence-based approaches to help **reduce age bias in recruitment**.

Drawing on the rapid evidence review, omnibus survey, key informant and employer interviews, this chapter examines a range of issues relating to recruitment bias. The aim is to clarify why these issues are important for employers, the extent to which they affect older workers, and to explore employers' strategic engagement with recruitment bias issues.

- Section 2.1 outlines why reducing age-bias in recruitment matters in becoming an age-friendly employer. This sets out the academic context, the prevalence of the issue and then differentiates between the different recruitment stages (pre-interview, interview, post-interview) highlighting the extent to which age discrimination can affect each phase. Two sources of bias are then discussed – age-based stereotyping and 'job typing' whereby particular jobs are associated with individual characteristics (such as age and gender). The section ends with a discussion of age discrimination as an obstacle to employment and job change from the perspective of older individuals.

- Section 2.2 explores current employer perspectives, policy and practice in relation to age-discrimination. This section draws on the qualitative evidence to explore employers' current levels of awareness around age bias, including views and practices they have encountered in their workplaces.

- Section 2.3 presents examples of promising approaches in relation to each of the recruitment stages, taken from the academic literature, expert interviews and case studies from employers. The various 'good practice' initiatives discussed include: training, attitude shifting, use of diversity champions, age-targeted recruitment, and measures to de-bias applications, advertising, shortlisting and interviewing.

- Section 2.4 summarises findings from this chapter.

2.1 Why reducing age bias in recruitment matters

2.1.1 Context

The increase in employment rates of people over the age of 50 in the UK over recent decades has largely been the result of increased retention rates, the extending of working

life and delaying of retirement by many people. Issues still exist in the recruitment of older candidates and age discrimination in the labour market can impact recruitment, retention, redundancy and retirement policies and practices.

Several strategies have been adopted to recruit and retain suitable workers, including the acceptance of diversity, i.e. social groups that deviate from the benchmark of prime age 'fit white male' (Duncan, 2003). Diversity has thereby become a goal for many British employers, driven in part by labour shortages but also demographic change. The recruitment process, however, would still seem to be fraught with problems for older workers and while advances have been made there remains considerable scope to implement more robust systems to prevent age bias. Evidence from the Fuller Working Lives Business Strategy Group (DWP, 2017: 25), for example, finds that recruiters are still more likely to take on someone closer to their own age, resulting in the skills and experience of older workers being overlooked.

In the following subsections the different stages of the recruitment process are set out and sources of discriminatory practice elaborated. Age bias can hamper each of the recruitment stages and the entire process from start to finish is vulnerable to direct or indirect age discrimination.

2.1.2 Prevalence of age bias in recruitment

As discussed above, age discriminatory recruitment practices remain prevalent and evidence suggests that recruiters are still more likely to take on someone closer to their own age (DWP, 2017: 25; Mercer, 2015). Our omnibus survey asked a series of questions to ascertain whether employers had implemented equal opportunities and diversity policies that explicitly refer to age in relation to:

- Recruitment

- Progression and promotion

- Learning and development

Figure 2.1 shows that nearly all large employers have at least one of these policies in place (96%), while 70% of small and medium-sized enterprises (SMEs) and around half (46%) of micro firms have at least one of these policies. Just looking at large employers, age discrimination in recruitment policies are most common – found in nearly all (94%) workplaces. A slightly lower proportion (80-84%) of large employers have policies that explicitly mention age in relation to the other 3 areas. Notably fewer SMEs (57- 63%) have procedures across the four policy areas.

Figure 2.1: Percentage of employers with equal opportunities/ diversity policies and procedures that explicitly mention age in relation to the following

At first glance it is hard to reconcile the fairly high proportions of employers with formal equal opportunities policies relating to age and recruitment with the widespread incidence and experience of discrimination as detailed above. Gaps between policy and practice need to be acknowledged, however, as does the impact of implicit or subconscious bias on hiring outcomes, discussed further in section 5.3, which can be harder to eradicate by means of formal written policies. A recent report by the National Institute of Economic and Social Research (NIESR) also highlights the limitations of diversity policies (NIESR, 2017). The study observes that in the public sector equal opportunities policies and practices or age-specific recruitment practices are not associated with higher proportions of older workers while in private sector workplaces the presence of an equal opportunities policy that explicitly mentioned age was associated with a lower proportion of older workers (the report acknowledges, however, that workplaces employing fewer older workers may feel greater need to implement such policies).

2.1.3 The recruitment stages

The recruitment process can be broken down into several stages, each of which warrants assessment to ensure they are free from bias and discriminatory practice. Recruitment can be divided into the following phases:

Pre-Interview phase
- Advertising vacancies:
  - Internally and/or externally

- Use of age-positive images and wording
- Location of adverts and use of other channels
- Job descriptions and person specifications
- Selection processes:
    - Shortlisting, long-listing (many recruiters now use software programs to sort applications automatically).

Interview phase
- Assessment
    - Candidate testing (for example, typing speed, psychometric test, reasoning test, verbal/numerical)
- Interviewing
    - Use of group and/or individual interviews
    - Structured vs unstructured question approach
    - Scoring system

Post-interview phase
- Final selection
- Peer vs manager selection

Pre-interview Phase

There is a large body of research examining bias at the CV screening stage, although most is focused on gender and ethnicity. Approaches have included 'audit' and 'correspondence' techniques to gauge the prevalence of discrimination in hiring practices. Audit studies use actor applicants for real jobs, coached to act alike and then measure job offer outcomes. Correspondence studies create applicant profiles (on paper or electronically) and measure call-backs for job interviews. Field experiments based on correspondence testing almost always show age discrimination in hiring processes (e.g. Gringart and Helmes, 2001; Riach and Rich, 2010; Albert et al, 2011; Neumark et al, 2016).

In one field experiment investigating age discrimination, pairs of men aged 27 and 47, enquired about employment as waiters in towns across England, France, Germany and Spain (Riach, 2015). Statistically significant discrimination against the older waiter was found in all four countries. Several other studies have used correspondence techniques to monitor call-back outcomes to two matched job applications with different ages but comparable skills (Neumark et al, 2016; Stijn et al, 2015; Lahey, 2008). In their Belgian study, Stijn et al found that if the additional working years of the older candidate were in a different occupation, or they had a spell of unemployment, they were 64% less likely to be invited for interview than the younger candidate with the same skills but less experience. In addition to correspondence techniques, Bendick and Nunes (2012) propose several other approaches to detecting hiring bias. For example, scrutiny of an online CV database that allows analysis of 'real' job applications, by Eriksson and Lagerström (2012), found a significant disadvantage to older applicants when controlling for education and experience.

Business in the Community (2015) reported findings from a two year study by the Recruitment and Employment Confederation (REC, 2015) that applied to 1,836 jobs advertised over a two-year period using carefully tailored CVs; the study revealed that older applicants were 4.2 times less likely to be offered an interview, despite being construed to have more experience - a bias that was more pronounced for women than for men.

Bartos et al (2014) demonstrate that attention discrimination afflicts job applications from minority groups such that once a recruiter sees a minority name on a CV, they pay less attention to the contents of the application. Names can also be indicative of age. Attention discrimination processes are said to be driven by System 1 and System 2 cognitive functioning, which can lead to biased evaluations (see Stanovich and West, 2000). System 1 (intuitive thinking) tends to be effortless, fast, automatic, implicit, and can be emotional. System 2 reasoning is typically more considered, slower, conscious, and logical. Being busy, under time pressure, distracted or stressed is more likely to invoke System 1 thinking. In circumstances such as evaluating diverse job candidates, exclusive reliance on System 1 thinking is likely to increase the risk of biased evaluations and use of stereotypes. 'Blind hiring' processes are seen as one solution and evidence suggests that anonymising CVs are effective (Bertand and Duflo, 2016). In response to discrimination in the hiring practices of German firms, a large-scale randomised field experiment assessed the impact of anonymising job applications (Krause et al, 2012) - anonymised characteristics included: applicant's name and contact details, gender, nationality, date and place of birth, disability and marital status. The study concluded that anonymisation effectively reduced discrimination against minority groups.

Interview phase

The extent to which age stereotypes translate into age discrimination in the employment interview and subsequent biased outcomes remains unclear and further research is advised. Macan and Merritt (2011) examine the employment interview as a social exchange characterised by a variety of verbal and non-verbal interactions that may give rise to very subtle forms of interpersonal discrimination in addition to more formal, overt discrimination such as differential evaluations of applicants' interview performances.

In a literature review of the effects of applicant age on employment interview processes and outcomes, Morgeson et al (2008) found that age discrimination is prevalent in employment interviews. However, of 21 studies, 16 were conducted in laboratory settings and while these overwhelmingly concluded that age discrimination is prevalent, the laboratory studies were criticised for artificiality. The 5 studies conducted in the field found "far less consequential age discrimination in the employment interview" (Morgeson et al, 2008: 223).

Reviews of employment interview research have concluded that adding structure to the interview process can reduce bias and enhance the reliability of interviewer evaluations (see: Huffcutt, 2010; Huffcutt and Culbertson, 2010; Posthuma et al, 2002; Levashina et al, 2014) but it has been observed that maintaining high standardisation can be challenging

and once compromised biases may enter the interview process (McKay and Davis, 2008). Unstructured interviews have been found to be among the worst predictors of on-the-job performance and are fraught with bias and irrelevant information (Bohnet, 2016a).

Interviews can also be 'blinded'. To prevent bias at the recruitment stage, Domestic and General conduct initial interviews over the phone; this ensures that selection is based on skills and experience (Smeaton et al, 2012). Evidence of the effectiveness of concealing candidate's identities is also presented in a Chartered Institute of Personnel and Development report (CIPD, 2016) that cites research by Goldin and Rouse (1997) - using a screen to hide candidates auditioning for an orchestra, female musicians increased their likelihood of being hired by nearly one third. Blind auditions were therefore recommended to improve the recruitment chances of women.

Post-interview phase

That bias can enter the post interview phase is evident from research such as Biernat and Fuegen's (2001) study, which found that women are more likely to be shortlisted for a job opening but less likely to ultimately receive a job offer. Different standards for and approaches to assessment of interview performance can lead to such outcomes. Macan and Merritt (2011) highlight several biasing processes that may enter the post-interview stage: shifting standards, status characteristics, and constructed criteria. Taking one example, the status characteristics model posits that to be perceived as equivalent, members of groups that interviewers have lower expectations of (e.g. women or older workers) must perform above and beyond the levels required for groups characterised by higher expectations.

Drawing from 120 interviews with employers and participant observation of a hiring committee, Rivera (2012) discovered strong processes of cultural matching - hiring is not simply a process of skills sorting but also one of cultural matching between applicants, evaluators, and firms. The study demonstrated the extent to which employers sought candidates who were competent but also culturally similar in terms of leisure pursuits, experiences, and self-presentation styles – considerations that often outweighed concerns about productivity. The study provides "the first empirical demonstration that shared culture—particularly in the form of lifestyle markers—matters for employer hiring." This form of self-replication contributes to the segregation of jobs whether by gender, age or other characteristics.

2.1.4 Stereotyping

Posthuma and Campion (2009) provide a review of 117 research articles and books that deal with age stereotypes in the workplace (see too: Abrams and Houston, 2006; DWP, 2015b). Their findings suggest that stereotypes about older workers still operate as barriers to their employment opportunities. They note the need to differentiate stereotypes (opinions) from prejudice (which is more affective, that is, related to feelings) and discrimination (which is more behavioural). Although many attitudes toward older workers are positive, most

stereotypes ascribe negative characteristics to older workers, with the following the most prevalent:

- Older workers have lower ability, are less motivated and are less productive than younger workers.

- Older workers are resistant to change, harder to train, less adaptable and less flexible.

- Older workers will have a lower ability to learn and therefore have less potential for development.

- Older workers will have shorter job tenure and therefore will provide fewer years in which the employer can reap the benefits of training investments.

- Older workers are more costly because they have higher wages, use benefits more, and are closer to retirement.

Fasbender and Wang (2017a) note that while there are numerous studies that investigate negative attitudes toward older workers, very few go on to demonstrate their direct link to hiring decisions. Exceptions include Lu et al (2011), who found that managers' positive attitudes toward older workers were related to their intention to hire older people, and a meta-analytical study that suggested that negative attitudes are a more powerful predictor of behavioural outcomes than positive attitudes (Meisner, 2012). Based on a structured online questionnaire and a vignette study using a sample of 102 decision-makers with hiring power across different industries, Fasbender and Wang (2017a) demonstrate that negative attitudes toward older job applicants do indeed lead to decisions not to hire. A recent meta-analysis on age and re-employment after job loss by Wanberg et al (2016) revealed that older people receive fewer offers, are less likely to obtain re-employment after job loss and take longer to find re-employment.

2.1.5 Job typing

Not all perceptions of older workers are negative - employers widely view older staff as loyal, more reliable and harder working than younger employees (McNair and Flynn, 2005). 'Job typing', however, can discriminate on the grounds of age and other characteristics; in other words some jobs are perceived as more suitable for particular age groups or are 'gender typed' (Duncan, 2003; Weller, 2008). In one study it was found that one-fifth of employers/HR managers believed some jobs in their establishment were more suitable for certain ages than others (Metcalf and Meadows, 2006). The reasons for preferring particular age groups included: skills and attributes required, reliability, customers' expectations, matching workforce to customer profile, time taken to train/be fully productive, the need for succession planning, job normally done by a certain age group and job not appropriate for someone older/younger (see too DWP, 2015a).

Age stereotypes have also been found to be particularly strong in industries such as finance, insurance, retail, and information technology/computing (Broadbridge, 2001; Lucas, 1995;

Perry and Finkelstein, 1999). Retailing is generally thought of as a 'young' industry, with hotel and catering jobs similarly associated with younger workers. McGoldrick and Arrowsmith (2001) have found that managers also gravitate toward younger workers when hiring in the finance and insurance industries. Age stereotypes are therefore exacerbated when 'job typing' arises and certain jobs and professions have strong age norms (Posthuma and Campion, 2009; Shore and Goldberg, 2005; Cleveland and Hollman, 1990; Cleveland and Shore, 1992).

Riach and Rich (2010) conducted an experiment to determine the incidence of age discrimination in recruitment with an interest in whether differences would be observed in different occupational settings. They applied for vacancies targeting: graduate chartered accountancy training, restaurant waiting jobs and assistant manager positions in female clothing stores. CVs were near identical apart from the age. The study found significant discrimination against the older applicants for the accountancy and waiter jobs, but a bias in favour of the older applicants in relation to the assistant manager vacancies.

In a 2012 study the Policy Exchange attempted to quantify the scale of discrimination towards older workers. Applying for over 1,200 personal assistant and bar jobs as both an older and younger worker, using CVs that were identical in every way apart from the date of birth, the 51-year-old applicant received fewer positive responses, being invited to interview less than half as often as the 25-year-old (Tinsley, 2012).

Drawing on the 2005 and 2010 Survey of Employers' Policies, Practices and Preferences relating to age (SEPPP), Age UK (2012) examined change over time to assess progress in organisational policies after the 2006 age discrimination legislation. They found that policies relating to recruitment saw the biggest positive change, although it was conceded that while overt age discrimination may have diminished, the extent of more subtle age discrimination is less readily ascertained. One example of progress is that in 2010 42% of employers asked for age during the recruitment process, down from over 70% in 2005. However, nearly a quarter of employers (23%) in 2010 still believed some jobs to be more suitable for certain ages than others, largely unchanged since 2005 and the introduction of age regulations.

An omnibus survey was used in this research to gauge the extent to which some jobs are seen as more suitable for younger rather than older workers. Findings are presented in Table 2.1; these suggest that age typing of jobs is quite widespread. Large organisations are the least likely to say that no jobs are more suitable for younger workers (37% compared with 55% of SMEs) and one third (35%) of large employers believe that most or some jobs are better suited to young employees. A similar proportion of micro and SMEs hold this view.

Table 2.1: Are there roles in your organisation that are more suitable for younger workers?

	Micro	SME	Large
Yes, most	9%	7%	8%
Yes, some	24%	21%	27%
Yes, very few	8%	16%	27%
No, none	57%	55%	37%

2.1.6 Employees' perspective

In a qualitative study of older workers returning to work after leaving full-time employment, Shacklock et al (2007) explored how organisations might help or hinder re-entry to the workforce later in life. They found that a lack of opportunities was perceived as critical in preventing work returns, with age also reported as an important factor in older people not being able to get another job. Summarising participants' frustrations Shacklock et al (2007: 160) observe that a range of age-related barriers were reported including a perception that they were over-qualified and "a lack of training of the hiring interviewers, the bias that can occur in an interview situation itself (such as lack of empathy and age differences between applicant and interviewer), an inability to provide recent references, and the process of hiring being perceived to be a farce". A key finding of the study was the lack of planning on the part of employers to consider older workers as a potential future pool of employees.

An Equality and Human Rights Commission study (Smeaton et al, 2009) similarly found that a perceived lack of opportunities constrained employment at older ages, whether looking to re-enter the labour market or change job to meet evolving needs or preferences. Based on a survey of 1,500 50-70-year-olds, around one quarter of men and women said they were dissatisfied with their occupation and would like to change jobs; when asked what were the key barriers they faced in changing job 20% indicated that their age was the biggest obstacle. Among the unemployed in the sample, around half were keen to find work. One of the most frequently cited factors that would help the unemployed get back into work relates to the demand side – 'if employers would recruit people my age' was mentioned by nearly three quarters (71%) of the unemployed. This perception that employers will not be interested in older job applicants can act as a powerful deterrent, preventing people from actively searching for work (the disillusioned) or from attempting to change jobs to better meet their preferences.

A Canadian qualitative study of older people's job hunting strategies found evidence that older applicants adopted several mitigation techniques including updating their skill-sets through training and volunteer work, adapting their CVs to remove reference to age, considering how they present themselves in an interview and adjusting their expectations of the level of work they might achieve (Berger, 2009). There is evidence that personal appearance and perceived levels of 'vitality' do affect employment outcomes (Karpinska, et

al, 2016). In a UK online poll, 23% of employed people aged 50 and over thought that their employer viewed older workers 'less favourably than younger workers', while 51% reported no perceived difference, and 8% felt that older workers were viewed more favourably (DWP, 2015). Similar processes of adaptation are also evident in response to perceived racial discrimination according to Kang et al (2016)'s work based on interviews and a résumé audit study in North America. They found that some ethnic minorities changed how they presented themselves by concealing or downplaying racial cues in job applications, a practice known as 'résumé whitening'; this included using a more 'white' or 'English' first name.

2.2 Current employer perspectives, policy, and practice

This section draws on our qualitative evidence to explore employers' current levels of awareness around age bias, including views and practices they have encountered in their workplaces.

Interviewees talked about two levels at which age bias and stereotypes operated in the recruitment process: implicit or subconscious bias, and explicit or conscious bias. The carers' organisation distinguished age bias in terms of two components: the assumptions that employers made in relation to older workers' softer skills - that is, their commitment, energy and ambition - and expectations around competency-based criteria,

"the sort of thing around 'Well, they didn't grow up with technology, they'll be less agile, they'll be less able to pick up, and work on some of our systems'."

Age biases around competency were sometimes accentuated in particular industries, for example the IT and technology sphere, when recruitment emphasis was placed upon 'recent' training rather than on the quality of applicants' skills. The Recruitment and Employment Confederation (REC) further explained that descriptions used in job advertisements like "an effervescent personality" or "a fresh approach", while not explicitly age-related, could be taken as a coded signal to older candidates about what recruiters were seeking, cause "immediate alarm bells" and potentially limit their applications: an effect that will impact upon the diversity of the list that recruitment agencies are subsequently able to put together. Another interviewee noted that the recruitment industry was itself a "young industry", which might have an implicit effect upon their practices.

Pearn Kandola, a business psychology consultancy, further elaborated on how this kind of job coding could privilege an age-defined workforce:

"People talk about, 'You have to have an appetite for this job, you have to have a hunger for this job,' and that is again words and language that's associated with

young people just starting out in their careers, rather than older people who have got lots to contribute."

They also raised the point that age bias might manifest in recruitment discussions around applicants' team fit, a process by which organisational culture reproduces itself, rather than one tapping into assessments of the benefits of mixed-aged teams. Pearn Kandola described working with employers who associated "cohesive teams" with background similarity, and gave the example of the perceived difficulties around age and fit for a company in the finance sector:

"a female manager in the session [training on unconscious bias] was quite open about the fact that she recently ran a recruitment campaign and actually the most capable person for the role didn't get the job because they were older, and because she was concerned about how they would fit in with the younger team, because the younger team likes to socialise together, have a good laugh in the office."

Other employer stereotypes that interviewees observed around older workers included being 'stuck in their ways', 'less flexible', 'less agile', 'less able to take on new challenges', 'not being physically able to handle stock', 'don't want to be trained', 'not being open to change', 'slow to learn something new' and 'less able to multi-task', all expectations that positioned older workers as static or lacking in some aspect of their capabilities. These kinds of perceptions do not require any grounding in evidence to provide a powerful influence on employers' recruitment behaviour, particularly when they are felt to be corroborated by peers. In more specific terms, the Local Government Association (LGA) interviewee observed that some employers cited concerns about pension claims as a rationale for not employing older workers. Several of the expert practitioners interviewed pointed to the effect of unconscious bias, that employers were "recruiting in their own mould", that is, that homiphily (the tendency for people to gravitate toward others who are like themselves) was informing recruitment decisions.

The interviewee from Pearn Kandola explained that a particularly detrimental effect of these kinds of employer biases about older workers was that they could culminate in older applicants being positioned as unfit to perform adequately in roles:

"there is a more insidious stereotype in there about associating age with lack of health: deteriorating health or deteriorating cognitive ability."

These kinds of implicit or explicit biases had the potential to interact with sectoral expectations around long working hours, such as in finance:

"there is a real assumption that you have to be go-getting, you have to be all these awful words, you have to be able to handle working at pace over long

periods without sustained breaks, and I think that's where we see a lot of the age discrimination against older employees come."
(Pearn Kandola interviewee)

Age Positive noted, however, that these stereotypes were not applied consistently. For example, the holders of powerful roles in business were often themselves older workers, in contrast to:

"a mindset, especially in some HR departments, that once somebody is in their mid-fifties they're a little bit over the hill."

Age then, interacts with other characteristics, such as class and gender, in the way recruitment bias operates.

The expert practitioners interviewed felt that employers' age biases and stereotypes were in large part unrecognised, or certainly not interrogated in the way that biases around gender and ethnicity more routinely are. Consequently, age bias was having a lasting impact upon older workers' experiences. This lack of awareness of age bias as an issue in recruitment poses a significant challenge, and hiring managers and line managers will be central in tackling recruitment bias. A lack of high quality monitoring data on age is one of the challenges in improving this at an organisational level. There was often the sense in our qualitative research that despite the legislative context around age, awareness had not reached the level of other protected characteristics in informing workplace practice: "people are less careful about it." The interviewee from Pearn Kandola explained:

"there is a sense that it's ok to make overt comments, or have explicit questions about whether somebody is going to be sufficiently committed, or sufficiently capable, or whether they are going to have the energy to do the role that's needed. There's just higher levels of acceptability around bias with older employees."

The interviewee from the Behavioural Insights Team (BIT) raised the point that certain kinds of recruitment biases were more challenging to tackle with interventions:

"I think conscious bias is harder to shift. If people have a strong view that they don't want someone of a certain age then I don't know how you're really going to change their opinion on that."

For example, the carers' organisation pointed to the difficulty that carers often had in getting past hiring managers' perceptions that they would be less committed employees.

2.3 Promising approaches

In the following sub-sections academic evidence of effective measures that employers can implement to de-bias the various stages of their recruitment process are discussed. Also presented are insights from the expert interviewees and case study examples from employers. The various initiatives discussed include: age targeted recruitment, measures to de-bias applications (in advertising, shortlisting and interviewing), training, and organisational awareness through use of diversity champions.

2.3.1 Age-targeted recruitment

Domestic and General (D&G) provide one example of a targeted recruitment campaign (cited in Smeaton et al, 2012). D&G proactively seek age diversity in the workplace and in their recruitment drives attempt to persuade people that call centre work is not just for the young – contrary to prevalent impressions. They have a Recruitment Champion for older workers, attend Recruitment Fairs and they encourage their older employees to act as ambassadors to help recruit other older workers. The company also has ongoing partnerships with Action for Employment and Working Links – employment agencies that provide support and career advice to those made redundant and the long-term unemployed (one-to-one coaching, vocational training and job-seeking advice). For unemployed older people this can involve IT training for up to two weeks. D&G also target specific media to attract a wide age range, for example using radio stations aimed at older listeners.

The evidence from our employer interviews suggest that large scale recruitment initiatives mainly target younger workers, but there were exceptions, such as Barclays' Bolder Apprenticeship programme and Home Instead Senior Care's age positive recruitment campaign.

Home Instead Senior Care have been running an age positive recruitment campaign in the UK around their social care provision. This was driven by the improved retention rates observed amongst older employees. Their recruitment model has targeted older workers around or shortly after retirement, picking up on these groups' greater desire to work flexibly but also to be involved in meaningful, socially-impactful work. Their advertising imagery has challenged stereotypes around age, care work and care workers, and they have built up case studies of older care workers, which are used in marketing materials and their website and emphasise work quality and organisational difference. Home Instead Senior Care have been conscious of both active and inactive jobseekers, adopting different recruitment techniques around these. For example, to reach inactive jobseekers they have taken an outreach approach, centring on providing meaningful work, and taking the campaign out into the community in a more intensive recruitment process. The organisation regards their approach as having business benefits in terms of the quality and longevity of the appointments they can make, for their reputation as an employer and in terms of client satisfaction.

In a rather different manifestation of age-targeted recruitment, Barclay's Bolder Apprenticeship programme now includes adult apprenticeships, which also draw on older workers who have retired early, faced redundancy or retired following a career break around caring. Barclays publicises its apprenticeship scheme by working with organisations like Jobcentres and specialist interest groups like disability SMEs and mental health SMEs, in addition to taking some of their current 'bolder apprentices' out into marketing events to "share their stories" with potential recruits. It is making this personal connection with peer groups that Barclays attributed to the success of the programme, and which is able to challenge stereotypes around age and career.

In terms of the different kinds of recruitment that are operating, REC pointed out that older people were one of the biggest growing groups among temporary workers, for example, within teaching or nursing. Consequently, recruitment practices around temporary work are likely to be effective in terms of interventions and good practice.

2.3.2 The application stage - de-biasing application forms

Given the difficulty of controlling unconscious bias and implicit attitudes, many recruiters now use software programs to sort applications automatically and produce long/ shortlists for interview. Applied (a recruitment platform (developed by the Behavioural Insights Team and Nesta) have developed a platform that focuses on making hiring fairer and smarter, and draws on behavioural science, designing out the influence of socio-economic characteristics on the selection process. Their approach uses work-sample based assessments, which are screened and scored blind to develop a more accurate proxy for job performance. They use experimental methods to test the robustness of their methods, and have found that half of those hired would not have reached appointment using previous screening techniques. While at present Applied's approach has focused on protected characteristics such as gender and ethnicity rather than age, a similar language-based approach would have strong potential to apply to designing out age-related recruitment bias.

Low tech methods to remove potential triggers for bias from CVs (such as names, ages, address) can also be used. Another approach is to increase accountability for CV screening - for example, Ford et al (2005) found that warning participants that they would need to explain and justify their screening decisions eliminated racial bias against applicants with 'Black-sounding' names.

While awareness training and other diversity-related educational tools may have some value in combating bias and prejudice, their effectiveness is unclear. Therefore, in addition to attempts to de-bias mindsets, employers should also de-bias hiring procedures. According to Bohnet (2016b) "work-sample tests, structured interviews, and comparative evaluation are the right things to do... smarter design of our hiring practices and procedures may not free our minds from our shortcomings, but it can make our biases powerless, breaking the link between biased beliefs and discriminatory actions."

With diversity and inclusion moving up the corporate list of HR priorities, Deloitte have shifted their strategic approach (Deloitte 2017). Rather than simply relying on training programmes, which have not changed cultures quickly enough, henceforth they are focusing on the eradication of bias from systems and processes to embed diversity into their culture. In tandem, they note the need for organisations to measure diversity, and hold managers accountable for outcomes. They identify the availability of assessment tools from businesses such as HireVue, SuccessFactors and Entelo, which can assist in hiring practices, job descriptions and interview scoring patterns to identify bias.

2.3.3 The application stage - de-biasing advertising

The way in which job adverts are worded emerged in the expert interviews as critically important in terms of reproducing bias, presenting barriers, and impacting on who applied for positions. Wording was important in two main ways: in the way that jobs were structured, and whether they were presented as potentially flexible, but also in the kind of language used and their coded meanings around age.

Lessons on 'what works' in relation to effective job advertising have been gleaned from gender research. According to Mohr (2014) for example, job adverts will be more inclusive and attract a wider range of applicants if clear about the job's requirements - women tend to apply for posts if they meet 100% of the specified required qualifications while men will apply when they meet only 60% of those qualifications. Differentiating between essential and desirable skills will therefore influence who applies. Gaucher et al (2011) similarly observed the power of advert wording to influence applications – when a job advert included stereotypically masculine words (such as leader, competitive, dominant) women were less attracted to these jobs compared with the same job advert constructed to include stereotypically feminine words (such as support, understand, interpersonal).

In terms of job wording, age-related language in advertising has received little academic attention. However, BIT explained that in the same way as it was possible to develop dictionaries of words more commonly used by men and women for use in gender-neutral advertising, then a similar approach could be applied to age:

"I don't know if there's anything on, for example, words that are more relevant to older workers, words that would, basically you need to use, an employer having a differently-balanced applicant pool, a candidate pool."

REC also raised the importance of reflecting on the terminology that employers use in job descriptions, asking if it might implicitly put off certain groups of potential candidates from applying. They gave the examples of "a bubbling or effervescent personality, somebody who has a lot of energy and a fresh approach, new ways of thinking", terminology not in itself age-related but which may have inadvertent effects upon recruitment by implicitly signalling youth. The REC encouraged its members to consider carefully the nature of the job they were recruiting to and think through whether the terminology used in its job description

accurately reflected the skillset they were seeking. This approach is reiterated in REC's best practice guide, in which they have partnered with Age UK, which draws employers' attention to the language used in adverts and the effects that it might have upon jobseekers.

Pearn Kandola also discussed the coded use of language in job descriptions as something that an age critique could usefully be applied to, and gave examples like 'drive' and 'energy' as potentially off-putting to older workers. They also suggested that it was employers' responsibility to present themselves as age-neutral to candidates, so as not to give older candidates a psychological disadvantage:

"So how you make yourself look attractive to potential candidates [so] that they don't feel like they are walking into the interview already five points down your rating scale because they happen to have another decade on top of other applicants?"

As part of Applied's online platform for recruitment they have developed text analytic tools to improve the inclusivity of job descriptions. These have been designed primarily in terms of gender, but also on readability, an aspect likely to have age as well as socio-economic implications. Applied were keen to develop this aspect of their product around a more diverse workforce, seeing an evidence gap in,

"robust dictionaries of words for what does and doesn't work for different types of ethnicities, and what does and doesn't work for different types of ages."

For example, age-related jargon might exist or there may be "just words that don't resonate for different types of people." They had found this kind of approach, with its quantifiable actions, to be very appealing to and actionable for employers. BIT anticipated using experimental testing to explore the impact of using different words on who applies for positions, evidence likely to be useful in building a case for employer action around recruitment bias.

Barclays, in talking about their apprenticeship programmes, reflected on the challenge of addressing the social norms around presenting jobs in particular ways. They noted that apprenticeships were generally seen as relevant to a certain age group, and that such assumptions stopped a broader demographic from applying. Barclays was addressing this bias by working with organisations like Jobcentres and disability SMEs to tap into a broader applicant base, and actively promoting their Bolder Apprenticeship programme as "opportunities for everybody."

Not all recruitment is initiated through traditional advertising processes in print or online media, and several interviewees drew attention to the importance of taking a more outreach-based approach when targeting older workers. Home Instead Senior Care, a social care provider, had found that visual information as well as wording was an important

part of advertising. They had started to use images of "obviously retired people" in their online advertising as a way of flagging to potential recruits as well as customers that they were an age-inclusive organisation, having already identified older workers as a key group they wanted to attract as care workers. They additionally launched an 'Are you a Super Hero?' campaign, which was designed to counter stereotypes about care workers as being younger and probably female, and emphasised the emotional support that older candidates, both men and women, had to offer.

Home Instead Senior Care also found that traditional advertising formats were insufficient to convince older potential workers of their suitability, so were also taking a more community-based outreach based approach. This included pop-up stands in supermarkets, public education campaigns (such as spotting dementia signs), going to local clubs and giving talks, and even informal approaches: "those are our opportunities to talk to people about what it's like to work for Home Instead Senior Care." This recruitment campaign was labour intensive, but had strong impacts on the quality of applicants, and the interviewee stressed the importance of "really understanding the profile of the people that you're looking for," in getting this tactic right. They were also working on the 'volume-drivers' of recruitment, using media like Facebook, which had proved effective in directing people towards their website. For the future they anticipated becoming more proactive in networking with organisations with a low retirement age, such as the Royal College of Nursing, to encourage new career pathways developing, drawing on a valued skillset: "Well those people will be great caregivers, you know, probably over-qualified, but you do find that a lot of them carry on working as bank nurses."

2.3.4 Shortlisting

Where recruitment agencies are used to identify candidates, the shortlisting stage takes on particular importance. Pearn Kandola stressed that where employers enlisted agencies for this stage of the recruitment process, it was important that agencies were provided with the right kind of information with which to fulfil employers' needs. For example, agencies are often asked to provide a diverse portfolio of candidates, but age does not tend to feature as an explicit requirement, "So I don't think age awareness has really cropped up on the radar of many recruiters." This was a gap where action could be taken. The occupational psychologists also noted that homophily, sometimes referred to as 'cloning', emerged as an issue during the shortlisting stage, and that one counter to this was increasing the diversity of recruitment panels.

Some employers, particularly in the public sector, were already building in a level of blind screening to the shortlisting stage by separating demographic from skills information in applications, and not passing the former information on to shortlisting panels. For example, the health care website NHS Jobs extracts key demographic information before applications are seen by recruitment panels. Indeed, as a result, one of the interviewees from the NHS case study reflected that if recruitment bias was to happen it would be at the interview stage. Employers will correspondingly want to concentrate actions aimed at recruitment

bias at the stages in the recruitment process where they are currently most evident, something which is possible through the analysis of good quality recruitment data.

Applied's online platform offered employers innovation in tackling recruitment bias at the shortlisting stage. While notably it has been designed around aspects of diversity other than age, its theory might equally be applied to developing shortlisting processes that are free of age bias. Applicants are set a series of written tasks to complete, and a scoring system is applied to their responses; these are then screened blind with no identifying information attached to them – the kind of approach endorsed by the Chartered Institute of Personnel and Development (CIPD). Applied's system takes the approach of designing out bias, "by changing who sees what and when", extracting the socio-economic characteristics which the evidence base suggests impacts on decision-making and introduces bias.

While recruitment processes are generally shifting in this direction – for example, modern CVs and application forms rarely have dates of birth on them – this remains imperfect as standard application forms typically ask for information from which age calculations can be made, such as work experience or university graduation. Applied were passionate about shifting employers' thinking away from these kinds of proxies for suitability which are embedded in organisational recruitment culture and that employers regard as economically efficient: "I think there's inbuilt bias just in the brutal filtering methods that organisations currently use." This was an assessment shared by other expert interviewees, such as the carers' organisation, who had come across occasions when older applicants had been repeatedly rejected, but after adjusting their approach to concentrate on more recent work experience, had received interview invitations.

Applied's philosophy in developing its platform was that the best way of shifting attitudes is by providing employers with calculable evidence of bias, an approach which goes back to the business case for diversity discussed throughout this report. Applied use work sample based assessments to conduct the selection stage, typically three to five questions that reflect the responsibilities of the job being advertised. These questions are designed together with employers to ensure their close alignment with task performance and industry, but also to confirm that questions are unbiased. This process of reflection and redesign has raised employers' awareness of pre-existing bias in the recruitment process:

"it was only [by] picking apart each of those questions and using that, and pairing that with the demographic data that we had on candidates that we could help them to learn [that] this might not be a question that you will find useful in the future for these reasons."

2.3.5 Interviewing

The experts and employers that we interviewed were least focused on the interviewing stage of the recruitment process. While it was recognised that employers had in large part moved towards using structured interviews to assess shortlisted candidates, with

interviewers taking on agreed roles upon panels and adopting parity in the questions put to candidates, there remained pockets of practice where little had changed and interviews were unstructured or loosely-structured, with decision-making concentrated with individual interviewers with little accountability to document the process. Applied reflected on the much greater scope for bias within this kind of environment:

"awful things that can happen when people are left to their own devices just to have a fireside chat with no relationship whatsoever to whether you're going to be the best person for the job."

Where homophily and personal preference was allowed to prevail unchecked in this way, diversity of thought in subsequent teams is one consequent loss. Applied's advice has been that candidates' answers to questions are graded by each interview panel member, allowing their performance to be systematically and accurately compared, minimising the subjective assessments that panels tend to make about candidates, particularly at the end of interviews. Applied were currently in the process of building a portal that would enable employers to score interview questions in the same way as they would application screening questions. They also reflected on employers' role in making interviewees feel equally comfortable in the interview environment, and not drawing attention to differences. Organisational training around interview protocol is one way in which these issues could be addressed.

2.3.6 Training

Training is a cross-cutting issue that applies equally to managing age-diverse teams, integrating flexible working arrangements and de-biasing recruitment processes. Evidence, discussed below, emphasises the importance, when designing training programmes, of careful consideration of the aims of training (what are the intended outcomes?) and the need to focus more on behaviour change than attitude change. Presenting training opportunities as voluntary rather than mandatory is advised, as is the use of face-to-face, interactive programmes rather than online courses.

While the focus of the current study is 'age', studies investigating other protected groups also provide valuable insights, particularly given the smaller literature around age. Kalev et al (2006) using data from 708 American private sector establishments, including the history of their personnel and diversity programmes, examined workforce diversification by race, ethnicity and gender. Seven diversity programmes were analysed, these included training and establishing responsible parties to achieve agreed diversity goals. By 2002, affirmative action plans were used in 63% of the workplaces, followed by training in 39%, diversity committees in 19%, networking programmes (for women and minorities) in 19%, diversity evaluations for managers in 19%, diversity staff in 11%, and mentoring programmes (for women and minorities) in 11%. Kalev et al (2006) found that diversity training has just one, negative, statistically significant effect – a 7% decline in the odds for black women in management. Kalev et al suggest this is not an unexpected finding given evidence from

previous laboratory studies that have shown adverse reactions to training (for example, Bendick et al 1998; Nelson et al 1996). As noted by Dobin and Kalev (2016: 54), when forced to train, people will often resist: "force-feeding can activate bias rather than stamp it out". In discussing why training may not be effective, Bohnet (2016a: 53) notes that training may make differences (whether age, gender or race) "more salient", effectively emphasising dissimilarities. Other studies have also shown, in relation to age, that making implicit biases explicit, that is, promoting awareness of the stereotypical views and biases we hold, is not effective in eradicating bias or enabling people to suppress those views. Kulik et al (2000), for example, conducted a study of age bias – participants watched a diversity training video, which encouraged suppression of negative attitudes toward older people, but when subsequently asked to evaluate older job applicants they exhibited more negative views than prior to the training.

Before dismissing the potential of training to achieve change it is worth noting that diversity training can take a variety of aims, methods, approach and content and other studies have found more favourable effects. Kalinoski et al (2013), for example, conducted a meta-analysis of 65 studies (N=8465) to provide guidance for HR managers seeking to implement diversity training. They differentiated affective-based (attitudes and biases), cognitive-based (knowledge of organisation's diversity goals and strategy), and skill-based (change in behaviour) outcomes. Diversity training was found to have larger effects on cognitive-based and skill-based outcomes relative to affective-based outcomes but, overall, the study concluded that diversity training can have beneficial effects, especially if the training used active (e.g. exercises) rather than passive (e.g. lecture, video) forms of instruction and if the training was based on a face to face rather than computer-based format. Kalinoski et al (2013) emphasise that diversity training alone is unlikely to achieve more diverse workplaces or greater diversity within specific occupational groups. Training is not expected to increase diversity directly as hiring rates and staffing goals are distal outcomes of diversity training, which require the implementation, in tandem, of many diversity-related practices such as affirmative action plans, diversity-tolerant cultures and diversity management executives. Training can only be expected to lever more proximal outcomes (attitudes, knowledge, and skills), which over the longer term are hoped to impact 'downstream effects' such as staffing (see too Kulik and Roberson, 2008a and 2008b).

Dobbin and Kalev (2016) differentiate mandatory and voluntary training, warning against mandatory diversity training designed to reduce bias on the job and when hiring. They observe that re-education and imposition of new rules are weak motivators for behaviour change. Using data from 829 large and medium sized US firms, the introduction of mandatory diversity training was found to be associated, five years later, with no improvement in the proportion of white women, black men, and Hispanics in management. By contrast, the introduction of voluntary training led to notably better impacts, raising the representation of minorities.

Informed by a behavioural economics perspective, Bohnet (2016a) highlights how difficult

it is to de-bias minds, with few demonstrably effective interventions, and recommends therefore that diversity training focused on raising awareness is replaced by training people in "more reasoned judgement strategies". In other words, changing behaviour should be the goal rather than changing minds.

Attitude-shifting initiatives, including training, were evident among some of the case study employers. Unconscious bias training was a practical and immediate way for organisations to start shifting organisational thinking around recruitment, and to take a long term approach to tackling bias outside of the recruitment system. The LGA observed significant activity in this area, with local authorities making use of their unconscious bias training for councillors and local government managers. This encouraged organisations to be thinking about recruitment in terms of talent, rather than life stage, and the LGA felt that a seismic shift was occurring: "I think it's actually, unconscious bias is a lot higher up in people's minds now in organisations." So too within the NHS, training around bias had become a routine part of recruitment practice:

"Certainly bias – conscious and unconscious – is something that is discussed as part of, certainly our training programme for recruitment."
employer representative from NHS Working Longer Group

However, there was variation in the degree to which unconscious bias training has been accepted across the labour market, with REC noting some divergent attitudes among its members, ranging from those who put all recruitment staff through it, to others were more sceptical of its value:

"there's different schools of thought about that: there's perhaps a growing body of research that's saying that actually does this help to cement bias by going through the training and by being made award of your bias, does that help or not?"

2.3.7 Diversity champions

In a study of gender and ethnic minorities, Kalev et al (2006) (see study description above) observe the following effects of implementing affirmative action programmes, diversity managers or committees:

- Affirmative action plans – the odds of appointment for white women rise by 9% and the odds for black men rise by 4% over a five year period.

- Diversity committees and taskforces – the odds for white women rise by 19%, black women rise by 27% and black men increases by 12%.

- Diversity managers – the odds for white women rise by 11%, black women rise by 13%, and black men by 14%.

Based on these findings it is concluded that remedies that establish responsible parties are most effective in securing change and promoting diversity (including affirmative action plans, diversity committees and diversity staff positions). Appointing a manager or committee with responsibility for change, whether in relation to gender, race or age diversity, is therefore likely to be more effective than diversity training (as set out above) which aims to alter attitudes and stereotypes.

Further support for the assignment of diversity goals to specific individuals or teams comes from a more recent study (Dobbin and Kalev, 2016) which used data from 829 large and medium sized US firms, combined with interviews with 'hundreds' of line managers and executives. The study concluded that engaging managers to solve specific identified problems is more effective than traditional diversity training programmes, as is exposing managers to people from different groups and encouraging social accountability for change. Interventions such as targeted recruitment, mentoring programmes, self-managed teams and task forces are therefore described as more effective in promoting diversity in businesses.

Corporate diversity task forces promote accountability, engage members and increase contact among the diverse groups who participate; Bertrand and Duflo (2016) report that intergroup contact effectively reduces prejudice among a broad range of minority groups including older people. Dobbin and Kalev (2016) quantify their effectiveness indicating that, on average, companies that use diversity task forces increase the representation of white women and each of the minority groups examined (Black, Hispanic and Asian men and women) between 9-30% over a five year period. Diversity managers exhibit similar gains – increasing underrepresented groups by 7-18% (except Hispanic men).

In the aforementioned studies, the representation of women and different racial groups in managerial occupations are the focus but age diversity goals in a broader range of occupations could also benefit from the suggested emphasis on diversity mangers, taskforces and champions, which effectively promote engagement and buy-in.

2.4 In Summary

Fairly high proportions of employers have formal equal opportunities policies relating to age and recruitment, yet the incidence of discrimination remains widespread. This discrepancy is explained in part by gaps between policy and practice, but also due to the challenges associated with eradicating implicit or subconscious bias by means of formal written policies.

Expert practitioners suggest that employers' age biases and stereotypes are largely unrecognised and not interrogated in the way that biases around gender and ethnicity are.

There is evidence of progress in relation to overcoming age-bias in the recruitment application stage. Employer and expert interviews revealed that employers are increasingly de-biasing the job application stage with careful use of language in job adverts, more carefully considering location of job adverts and removing data fields such as age from application forms.

The interview stage, however, remains largely unchanged, often still loosely-structured and with decision-making concentrated in individuals with little accountability for outcomes. Unstructured interviews are poor predictors of on-the-job performance and are fraught with bias.

Measures identified as effective in undermining age bias in recruitment include raising organisational awareness and capabilities across organisations through training and use of diversity champions. Training can be more effective if focused on behaviour change rather than attitude change, presented as voluntary rather than mandatory and undertaken face-to-face. **Use of diversity champions** can be effective when it is rolled out either via managers or a taskforce with delegated responsibility to achieve specific equality goals.

3. Promoting good quality flexible work

Good quality flexible work is highly valued by older workers and can support people to remain in or re-join the labour market. Full access to flexible working arrangements can help older workers fulfil their potential at work. However, older workers in the UK feel that access to flexible working arrangements is limited (Marvell and Cox, 2016).

Drawing on the rapid evidence review, expert and employer interviews, this chapter focuses on flexible work as a key component of age-friendly workplaces.

- Section 3.1 contextualises flexible work, examining its prevalence in the UK labour market and relationship with older workers, the various drivers for older workers seeking flexible working arrangements, the business benefits for employers in implementing flexible work, and recent government policy and legislation in relation to flexible working trends.

- Section 3.2 draws upon both sets of qualitative interviews to examine employers' engagement with flexible work in terms of current awareness and practice, and obstacles around setting up flexible working arrangements in organisations.

- Section 3.3 then looks at how the evidence base can be put into practice, drawing upon both the literature and the primary research to provide examples of promising approaches around flexible working, considered in terms of flexible hiring, a range of flexible working options, developing managers' knowledge and capability around flexible work, and job sustainability.

- Section 3.4 summarising key issues for employers to address in taking on flexible work good practice attuned to older workers' needs.

3.1 Why good quality flexible work matters

3.1.1 Context

In the context of global competition, skills shortages, an increasingly 24/7 society, and demographic change, many organisations have been adapting their methods of working and working time regimes. Facing cost and quality competition, organisations depend on the skills, commitment and initiative of their workforce. Therefore, to attract, nurture and retain staff with these qualities, companies increasingly offer ways of working that meet the various needs of their workforce. These pressures will be accentuated in sectors

experiencing raised levels of early retirement, where flexible working arrangements can provide a key retention tool (Koc-Menard, 2009; Ng and Law, 2014). A recent review of barriers and facilitators of women's extended working in Europe identified flexible working arrangements as the most important retention intervention currently in operation (Edge et al, 2017). The Taylor Review (2017) also identified older workers as one of the key groups in the UK workforce (together with women, carers, and people with disabilities – all categories that may overlap with older workers) to value and benefit from flexible working practices.

Flexible working, however, covers a diverse range of working practices ranging from homeworking to compressed hours, and, of relevance for older workers, tapered retirement practices. In 2015 the Labour Force Survey (LFS) asked about eight different kind of flexible working practices (flexible working hours, annualised hours contracts, term time working, job share, nine day fortnight, four and a half day week, zero hours contacts, and on-call working). However, this is by no means exhaustive; Young (2017) recently estimated that there were over 700 possible combinations of flexible working. Flexible working arrangements may be distinguished in terms of three key aspects of their organisation: time variations (for example, part-time working arrangements or term-time working), place variations (such as remote working) and format variations (including job shares and informal flexible working arrangements). The category of part-time working presents its own challenges in discussing flexible work. For example, part-time jobs may be designed for employers' convenience, and not reflect older workers' needs. Part-time flexible work of the type that older workers would benefit from would reflect employers having allowed employees to request these working arrangements, an important nuance that data collection processes have struggled to address. This is part of the challenge that makes it very difficult to obtain high quality data on flexible working. It is also critical to distinguish the drivers of flexible work, so for example, zero-hours contracts or agile working arrangements initiated by employers offer a very different formulation of flexible working from those informed by workforce demand, and the former are not the focus of enquiry in this report into age-friendly workplaces. A key issue in flexible work negotiations is the mutual balance that is achieved between workers and managers in the design and practice of transformed working arrangements.

3.1.2 The benefits to business of flexible working

There is a large set of literature looking at the organisational benefits of flexible working, tending to be largely concentrated in the grey rather than the academic literature. The business benefits of flexible work that have been analysed include increased productivity, increased worker goodwill, reputation-building, improved retention and enhanced opportunities for workforce planning (including recruitment drives and skills transfer), enhanced productivity and thereby competiveness (Clarke and Holdsworth, 2017; Knell and Savage, 2001; Kossek and Thompson, 2016; Richman et al, 2008; Rousseu, 2005; Savage, 2000; Woodland et al, 2003). The caveat around this is that it is well-managed flexible working arrangements that most incur these benefits – less supported ones can increase stress for employees and inconsistently-applied flexible work policy can lead to

employee perceptions of unfairness (Clarke and Holdsworth, 2017). Indeed, Pitt-Catsouphes and Matz-Costa (2008), using lifecourse observations across 22 companies (N=49,209), found that flexibility fit was most strongly linked to employee engagement for people aged 45 and over; individualised flexible working arrangements thus provide a key tool in the retention of older workers. Conversely, Matthijs Bal and De Lange (2015), in a cross-national study, found that flexibility HR management enhanced older workers' job performance. The authors drew upon selection, optimisation and compensation theory (Baltes, 1997) to explain this finding, arguing that older workers utilised flexible work to counter health-related losses and enable them to maintain performance. In a review of evidence examining the business benefits of flexible working, Smeaton and Ray (2014) concluded that, overall, flexible working arrangements are beneficial for productivity, a reduction in absences and improved rates of retention. A strategic 'bundling' approach (that is, where multiple flexible arrangements are available) was found to exhibit stronger positive outcomes.

By contrast, there is evidence that a lack of labour market flexibility, observable in jobs not being advertised as flexible, can have a stagnating effect upon the supply and demand of labour, with older workers remaining in positions from which they might otherwise have progressed because they fear not being able to secure carefully-negotiated flexible working arrangements elsewhere. For example, research by the Timewise Foundation (2013) found that two-thirds of those working part-time felt 'trapped' in low quality positions because they were not confident that they would be able to secure or negotiate flexible working arrangements that better fitted their skill sets. Holmes et al's (2007) survey of employees' changing workforce needs flagged the different choices that people would have made in their careers had various flexible working arrangements been open to them. Work that is objectively defined by employers as flexible, does not necessarily reflect older workers' changing needs. As a result of 'trapped' workers, employers may find themselves unable to attract desired talent in recruitment drives where advertised positions do not provide an indication of flexibility that could open up the market of applicants, suggesting value in keeping the format of working arrangements under review. The availability of flexible working arrangements can have positive effects on employers' labour supply in several ways:

- retaining staff in post for longer and promoting their skills development

- ensuring that recruitment drives attract the broadest possible talent pool to positions

- incentivising early exiting older workers to re-enter the labour market

3.1.3 Government policy and flexible working

UK legislation around flexible working was introduced with the 2002 Employment Act, giving parents of young or disabled children the right to request more flexible working arrangements from their employers. In formalised terms, flexible working became more accessible for older workers to request in 2007, when an extension of the right included carers, and again in 2014 when the right to request flexible work became a universal right (ACAS, 2014; DWP, 2014). The right to request legislation provides a guidance framework,

but is less prescriptive in specific policy terms, and subsequently ACAS published a Code of Practice for employers (2014). In addition to this, the Care Act 2014 is relevant to flexible working, since it provides for carers to receive formal assessments, which consider how caring impacts upon carers' broader lives, including their paid work. This might then become a route into raising flexible work for older workers with care responsibilities.

It is still relatively early days in assessing how much of the theoretical right to request flexible working is translating into changed working practices for older workers. Factors complicating analysis of the legislation's impact include the wide degree of informal flexible working practices that exist within many workplaces, which may never be translated into formal requests and remain relatively invisible, as well as a lack of compulsion for organisations to collect data around the formal requests they receive (Parry, 2017). Together these factors make it challenging to establish an evidence baseline around older workers' flexible working arrangements. Notwithstanding these technical complications, however, and combined with demographic factors and policy changes around pensions and retirement, it seems likely that the legislative change will see the formalised demand for flexible working from older workers increase in the future, although this might not necessarily translate into an increase in flexible working arrangements.

3.1.4 The prevalence of flexible work

Several calculation difficulties characterise estimations of the prevalence of flexible work in the UK labour market and have led to variation in its reporting. While the CIPD (2012a) optimistically reported that 96% of employers offered flexible working arrangements, the Women and Equalities Committee (2016) suggest a more conservative estimate of only 6.2% of jobs offering flexible working, a figure developed through the Timewise Index[1]. The Index represents jobs that are – in principle – flexible at appointment, which is not necessarily the same as those taken up as flexible, or those in which flexibility is negotiated at a later date, circumstances that present their own obstacles for employees (see section 4.2.2)[2]. The availability of flexible work in the labour market also needs to be compared to employee demand in order to provide a meaningful picture; Stewart and Bivand recently estimated a

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1 The Timewise Flexible Jobs Index (2017) estimates the availability of flexible positions using an analysis of 6 million job advertisements of approximately 300 UK job boards over a four-month period each year; it imposes some quality restrictions on the positions it counts as flexible (such as setting a minimum salary). Using a broad definition of flexibility as working patterns outside a static 9-5 model, in 2017 it estimated the flexible jobs market at 9.8% (up from 6.2% in 2015).

2 Some of these extensive estimation differences around flexible work may be explained by sampling differences, in that the CIPD survey draws on its membership (and measures employers rather than the number of jobs), as well as definitional differences between flexible work being offered in principal, and this translating into flexible arrangements being successfully negotiated and implemented. The 96% cited by CIPD then does not reflect flexibility operating in practice, and so too definitions of flexibility are subjective and thus employers may be reporting on different arrangements in answering the question. So while the CIPD survey remains one of the larger scale survey sources of data available on flexible work (based on 1000 employers and 2000 employees), comparing it to alternative sources illustrates some of the complexities of flexible working.

shortfall with 6.2% availability compared to 47% demand among workers (2016).

There is also a significant difference in the availability of flexible work across different sectors. For example, 20% of health and social care positions are currently advertised as flexible, compared to just 2% of engineering jobs (Stewart and Bivand, 2016), so workers' access to flexible work is uneven. McNair et al (2012) additionally observed that retail and charitable sectors have relatively higher levels of flexible working. The authors attributed sectoral differences in part to industries' divergent responses to an ageing population. This issue is also linked to occupational differences in gender and organisation, with women more likely to work in the lower-paid, part-time positions commonly characterising flexible working (Smeaton and Vegeris, 2009). Johnson's report for the Government Office for Science (2015) on evolving work needs also pointed to some key differences in the availability of flexible working arrangements across the labour market. It highlighted, for example, that flexible working arrangements can be more complicated to organise in small businesses, an issue that is significant since older workers are somewhat more likely to be employed in small and medium-sized enterprises (SMEs) than in large organisations (Forth et al, 2006).

Labour Force Survey (LFS) data from the summer of 2016 can be used to consider the prevalence of flexible working over working lives. Breaking down key measurements of flexible working by gender (Figures 3.1 and 3.2) the proportions using different types of flexibility are similar across the life course. In Figures 3.1 and 3.2, the sample size for nine-day fortnight (compressed working), four-and-a-half day week, and job-share is less than 25, so has not been included in this analysis. One key difference is the drop in use of annualised hours (see ACAS, 2013 for explanation) among both men and women after the age of 65; by contrast their employment on zero-hours contracts increases in the older age group. Women also make much greater use of term-time flexible working arrangements at all ages, a pattern that is likely to be linked to historically gendered caring patterns in the UK. Otherwise, use of flexitime, annualised hours, term-time contracts, zero-hours contracts, or at least one flexible working arrangement show little variation over the life course.

Figure 3.1: Men's use of flexible working arrangements by age group as percentage of workforce

Legend: At least one flex* · Zero hours · Term-time · Annualised hours · Flexitime
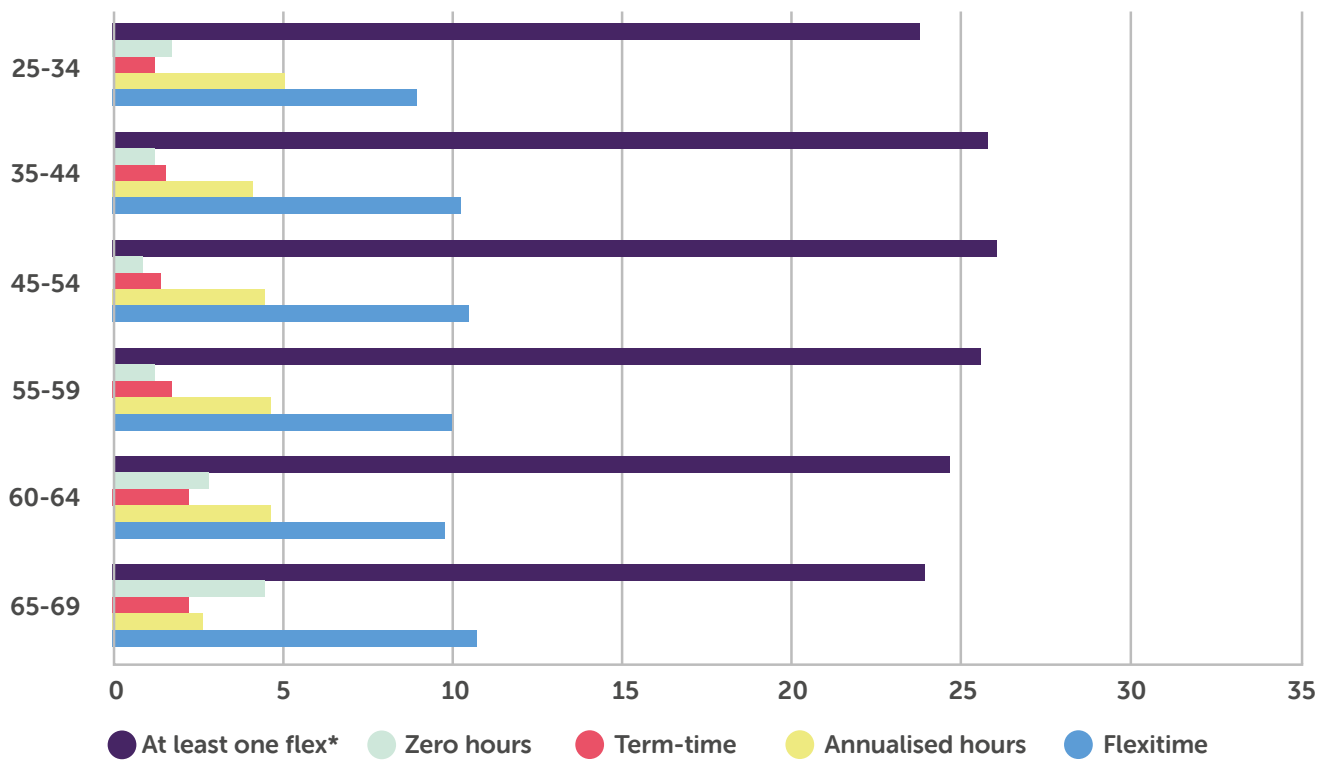
Figure 3.2: Women's use of flexible working arrangements by age group as percentage of workforce

Legend: At least one flex* · Zero hours · Term-time · Annualised hours · Flexitime
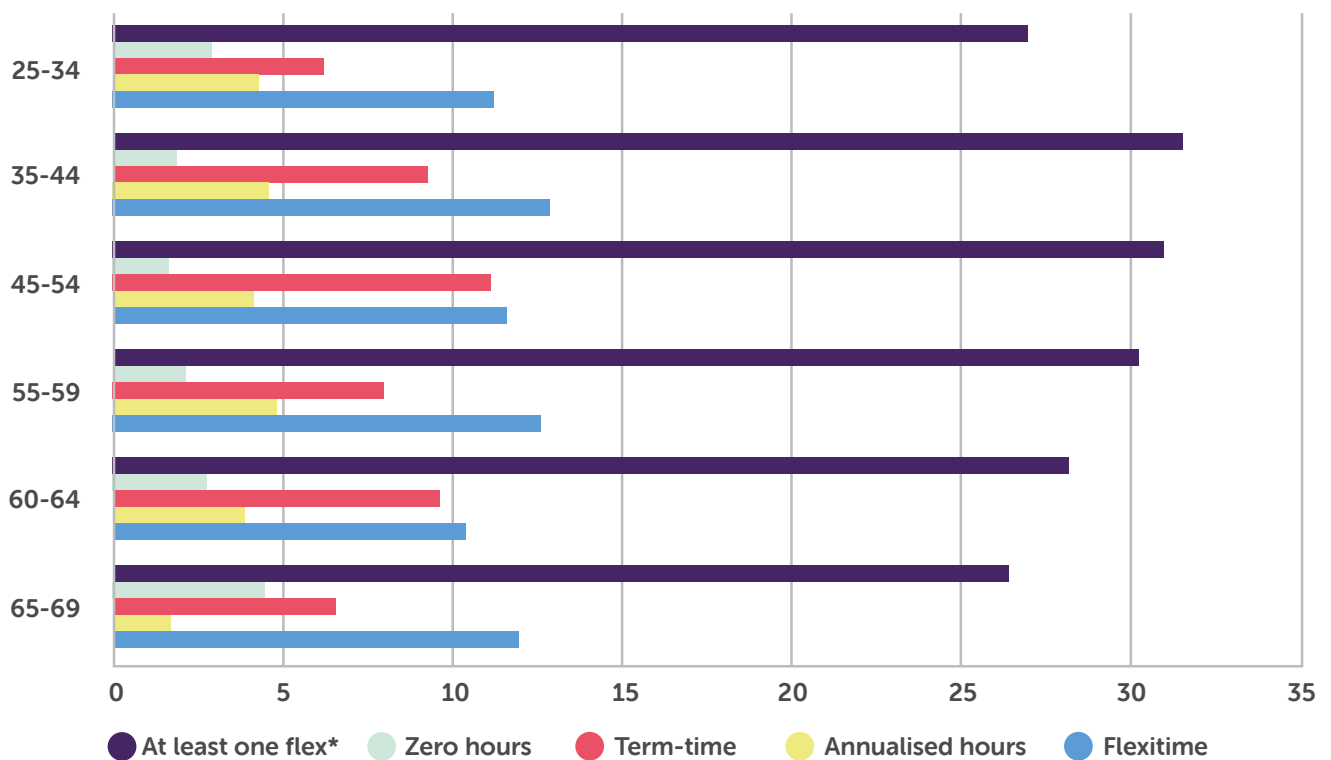
Looking at part-time working alone (Figure 3.3 below), women were more likely to work part-time than men at all ages (in 95% of cases, the self-definition of part-time working is less than 30 hours per week). However, the gap between men and women's part-time working narrows over the life course: while at 25-34-years-old, women are four times more likely to work part-time than men, just before retirement (age 60-64-years-old), this narrows to nearly three times more likely, and aged 65 and over women are twice as likely to work part-time as men. In part, this reflects a historically gendered pattern of economic activity around family formation and caring (Crompton, 1997). Homeworking is also an important factor in this narrowing of gendered patterns of part-time working, with Age UK analysis of LFS data indicating that over the age of 60, men were more likely than women to work from home (Age UK, 2012). In fact, they noted that when homeworking was excluded from flexible work definitions, flexible working actually declined with age, following a peak in people's forties and fifties (Age UK, 2012). Homeworking then has a notable significance for older workers, and particularly so for older men.

Figure 3.3: Men and women's incidence of part-time working by age group
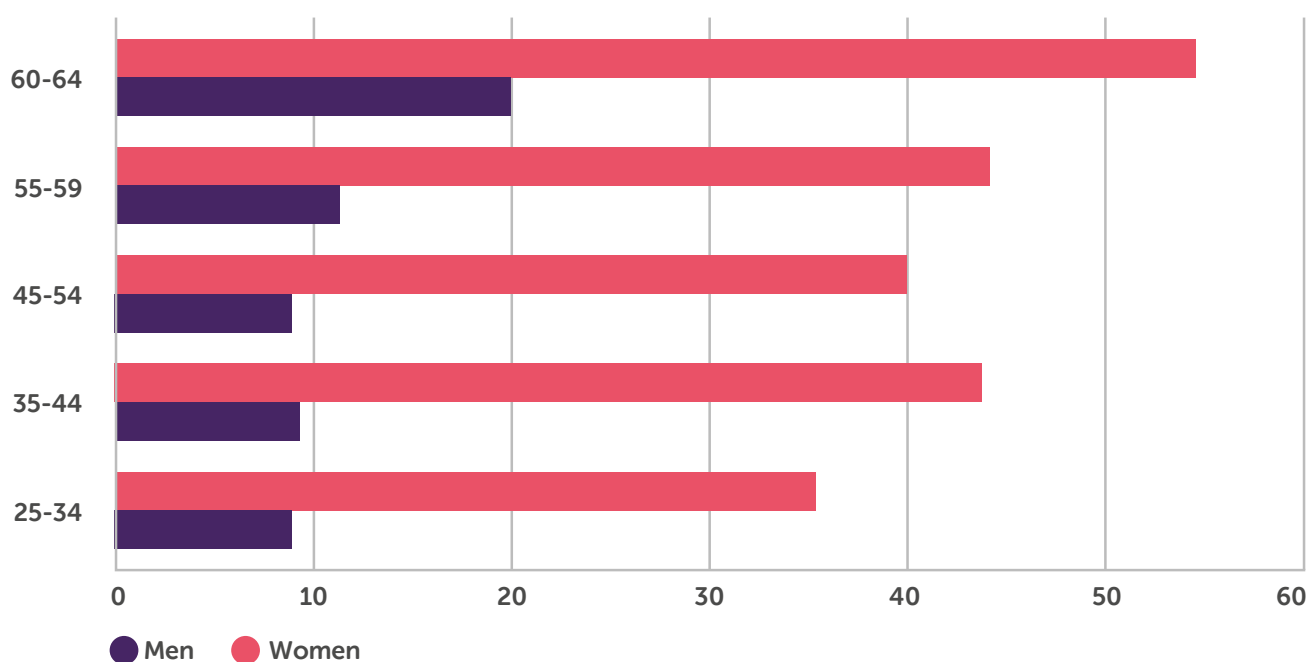
While LFS data is useful in establishing baselines around the prevalence of flexible working arrangements, it tends to focus on formalised flexible working arrangements, whereas for older workers whose circumstances may be in flux flexible working may be more tentative or informal, and we are unable to isolate the incidence of this in LFS data.

It has recently been suggested that latent demand for flexible working far outstrips its accessibility (Women and Equalities Committee, 2016; NIACE 2015). If this is a particular issue for older workers, then it presents a pressing policy issue. A desire for flexibility was found to be quite widespread in one survey of 1,500 older individuals aged 50-75 (Smeaton

and Vegeris, 2009); broadly, the older workers surveyed spoke positively about their experiences at work, but one fifth felt the degree of flexibility in the hours they worked was not ideal, and nearly one fifth wished to see a change in the flexibility of their working locations. The proportion of older workers describing their jobs as less than ideal in some respect was highest among those with caring responsibilities, poorer health or a disability. Unmet demand for greater flexibility at work was therefore fairly prevalent and the longer the hours worked, the more likely older workers were to express dissatisfaction with their hours of work.

3.1.5 Older workers' drivers for flexible working

Older workers, a rising demographic in the UK workforce, may have particular motivations positioning them as prime candidates for flexible working in situations where they might otherwise be forced to leave the labour market early (Eversole et al, 2012; Marvell and Cox, 2016). For older workers, more flexible working arrangements can support those with caring responsibilities or health difficulties. Around seven million adults in England have caring responsibilities for a sick, disabled or elderly person (Carers Trust, 2018), and caring responsibilities peak among 50-64-year-olds (DWP, 2014). One in six carers gives up or cuts back on their paid work commitment to provide care, with implications for longer-term financial well-being, as well as an impact on employers in terms of skills availability (Glendinning, 2009). Recent analysis by Age UK (2016) has pointed to variations between occupational groups in how caring affects their working lives, with those in lower social groups making the largest reductions to their working hours. This finding is likely to be related to socio-economic health differences (Marmot, 2010) and their cumulative impact upon care demands over the life course.

Health or physical changes may also drive changing priorities around work; people aged 50 and over often favour a reduction in hours to prevent stress, fatigue or the onset of other physical ailments that may be associated with manual working (Timmons et al, 2011; Nilsson et al, 2011; de Preter, 2010; Oude Hengel et al, 2012; Pengcharoen and Shultz, 2010). The menopause, too, causes workplace difficulties for a significant proportion of working women (Brewis et al, 2017), coping with which can prompt a drive for more flexible working arrangements. The downshifting of hours or responsibilities can ease the transition to retirement on a more gradual basis and prevent early retirement (Lissenburgh and Smeaton, 2003; Barnes and Parry, 2004; Loretto et al, 2005). Older workers may also be seeking to balance paid work with looking after grandchildren (Hank and Buber, 2009; Age Platform, 2016), reflecting changes in women's labour market participation earlier in the life course.

3.2 Current employer policy, practice and perspectives

This section draws on primary qualitative evidence to explore employers' current levels of awareness around the degree, demand and motivations for flexible working arrangements

among older workers, drawing out sectoral differences, and reflecting on employers' responsiveness to the business case for flexible work. It also outlines the importance of workplace culture in supporting flexible work practice, and looks at current practice and some of the ways in which flexible working is perceived to be used by older people, before considering obstacles and challenges for organisations in taking it on.

3.2.1 Employers' perspectives around flexible work demand and practice

As discussed above, flexible working arrangements are driven by a combination of factors, and the satisfactory balancing of mutual interests is key in making flexible working sustainable and successful. The key push that has concerned this research is older workers' demand for flexible work: making jobs fit with older workers' changing circumstances, for the reasons discussed in section 3.1.5. More broadly, however, these have to be counterbalanced against employers' concerns about workplace fit.

Employers' awareness of and response to demands for flexible working arrangements were linked to how much they believed the business case for flexible working, and what they regarded as the benefits of flexible working for their organisation. Whilst the employers interviewed were well-versed and enthusiastic about these arguments, more broadly buy-in to the business case for flexible working is less well established among the employer population. Publishing success stories and metrics establishing positive organisational change could be one way to counter this, alongside large-scale evaluation of flexible working practices.

Employers' awareness of the extent and demand for flexible working arrangements among their employees is complicated by several factors. First, informal flexible working arrangements that have been negotiated with individual managers, regardless of their prevalence, may be relatively invisible at an organisational level. Second, desire for flexible working does not necessarily translate into requests for changes to working arrangements where staff feel that these will be blocked by managers, or indeed where even asking for flexibility may damage their position in the workplace; this presents a latent and unknown demand for flexible work. Third, many workplaces do not routinely collect data on flexible working arrangements and requests in a way that would provide employers with insight around older workers' current and projected needs. This lack of data can also make it difficult for employers to establish an accurate sense of the extent of flexible working arrangements among their competitors, information that might act as a catalyst to action.

Given the clustering of older workers in SMEs (Forth et al, 2006), it is important to recognise different ways of conceptualising flexible working: in SMEs managers may allow flexible working to go on, without explicitly recognising it as such. Rather they position any adjustments as 'helping' staff achieve 'x and y' rather than effecting a formal change in working patterns (Age UK 2018, personal communication, 6th February). Such differences make it difficult to accurately compare flexible work across labour markets.

Even in organisations like local authorities, which had relatively robust data collection mechanisms, there were gaps in knowledge around flexible working arrangements. Islington Council explained that their metrics on flexible working extended only to certain kinds of flexible working:

"We've got something like 18.5% of our employees work[ing] less than thirty-five hours a week. I err on the side of caution a little bit with that because the only thing it doesn't include is people who are doing condensed hours, because we've got no means of tracking that at the moment [and] the informal stuff never gets – very rarely gets recorded, and I know lots of that goes on."

Given a widespread recognition amongst the employers interviewed that flexible working arrangements were valued by older workers, their narratives tended to highlight the importance of negotiating a pattern that worked for both older workers and employers. 'Flexible flexibility' was frequently cited as most comprehensively reflecting this demand, and in large part interviewees emphasised the diversity among older workers that informed their preferences and needs - "they've all got their own reasons" – and rejected the argument that particular flexible working patterns were more popular or suitable for older workers. Barclays pointed to the mutuality that could be achieved in flexible work in the retail sector: that where retailers needed to staff weekends, older workers tended to have fewer childcare commitments, and in fact might have greater flexibility around these shifts than workers with young families.

Some employers were noticing that requests for flexible working more often came from older workers, although this was related to the demography of their workforces. However, those making this observation were aware that they needed to have a robust response to this need:

"Especially with this becoming a very ageing workforce, I'd say the requests are coming more from that end."
Islington Council

Timewise noted that 35% of their current clients who had registered on their jobs site to look for flexible work were aged 50 and over, and while some were more active than others, older jobseekers represented a significant part of Timewise's market.

There were some notable sectoral issues around the demand for flexible working from older workers. For example the NHS Working Longer Group's call for evidence identified a trend of employees returning to the NHS after retirement to work on a flexible basis, often in another area: that is, generating flexible working arrangements in addition to the flexible working already associated with its career paths. Considering that at the time of the Group's reporting the NHS had a staff of 1.3 million and an average age of 44 (NHS Employers, 2014), such trends look set to play a very significant part in workforce demands of the future and suggest

that the demand for flexibility is outstripping supply in current sectoral pathways. The union representative from the NHS Working Longer Group reflected that job design staffing in the NHS struggled more with a reduction in working hours than with other kinds of flexibility; this has implications for older workers if fewer hours is their preference or need:

"I think the Health Service struggles with that. Regardless [of] what politicians say, with nursing it certainly is a 24/7 occupation in most areas, and it is difficult enough to deal with shift rotation when they are 12 or 13 hour shifts."

The interviewee from the local NHS Trust reflected that the demand for flexible retirement packages might be accentuated by the ongoing raising of the state pension age, and with it an extension of the period in people's lives when they had conflicting demands on their time. Several employers noted a lack of reliable information directed at employees around pension entitlements and working patterns, which would enable good decision-making around flexible work and retirement; they added that individualised support would be welcomed and would be likely to have additional employer benefits around workforce planning.

Sometimes resistance to flexible working appeared more cultural than structural. Pearn Kandola spoke about being struck by the non-engagement of law firms around flexibility, "there is just a fundamental, not only lack of appetite, but just lack of willingness to even explore what flexible working would look like," although the explanation given for this was around an immovable long-hours culture.

Among the employers interviewed, staff retention came out strongly as a positive outcome of flexible working. Sodexo described these business gains as "massive", and pointed to the competitive edge that being seen as a flexible employer provided them, which was valuable when the organisation was seeking to recruit scarce skillsets:

"it's around talent attraction and it's around talent retention as well. From thinking from the perspective of my own team, I've been able to bring somebody into the organisation who had great talent, and it's because we are able to offer the flexibility that perhaps she wouldn't have with another employer."

In terms of existing staff, the same interviewee explained that flexible work was a key way to retain older workers in response to the skills deficit, and ensuring that they were motivated and performing at capacity, feeling valued and listened to:

"it also means that you essentially get a hundred percent of somebody's brain even if you don't have a hundred percent of their time. [...] From an organisational perspective we continue to benefit from their wind and their experience, their contacts within the organisation."

Illustrating some sectoral differences in resources, Islington Council explained that where key skill sets were proving challenging for them to retain in the current climate, and they had little scope to negotiate on salary, flexible working arrangements provided a key retention tool. The New Economics Foundation was particularly interested in flexible working in terms of reduced hours, and gave the example of a call centre in Glasgow that in response to high staff turnover had introduced a shorter working week, a change that addressed work intensification, increased well-being at work, and saw a "massively reduced turnover of staff."

Some employers were using flexible work to retain scarce skill sets. For example, Islington Council were open to offering social workers flexibility since senior posts would be challenging to fill. Timewise noted that this kind of push into flexibility was a common one for employers:

"we get businesses coming to our job site when they've tried advertising a job full-time somewhere else and they've not been able to fill it, and they'll be triggered or interested in flex."

Timewise also noted geographical aspects to this trend, that in the more crowded labour market of London there was less incentive for employers to offer flexibility than outside, where posts could be harder to fill. However, there was a growing concern, particularly amongst hospitality, health care and retail, that Brexit would change labour supply conditions, and employers' strategies would have to shift once more it they were retain a competitive edge on recruitment.

Workforce planning and awareness of the changing workforce was another important influence on employers' engagement with flexible work practice. Left unaddressed these could prompt a shortage of key skill sets and affect business viability. Flexible working arrangements provided employers with a key resource in addressing this potential skills deficit, retaining staff as well as encouraging them to work for longer. Flexible working for older workers also enables succession planning, offering managers a more finely-tuned knowledge of when key staff were likely to retire, and enabling them to organise knowledge transfer in the meantime. In older workforces like the NHS this ability was particularly valuable and timely, as one local NHS Trust reflected:

"we're also trying to plan for: how do we fill the gap, because we're going to have significant workforce gaps if lots of people do decide to retire when they could retire in five to ten years' time."

The Trust was actively involved in workforce modelling to engage with these issues in finer detail, and it was seen as an issue of high strategic importance. It had also recently launched a mid-career training programme that aimed to get employees re-evaluating their work in a supported environment, an initiative which set a precedent for an earlier dialogue around flexible working. The kind of forward planning information that mid-career reviews provide

organisations on their workforces' need will be particularly valuable in sectors such as health care, where managers need to staff different units with specialist skill sets. For some employers there was a duty of care element to workforce planning, a recognition that a cliff edge model of retirement following a long hours culture of working might have negative repercussions upon older workers' well-being, and consequently a concern to employ flexible working as good practice around end of career transitions.

3.2.2 Workplace culture and flexible work

Workplace culture and the general sense of acceptance and visibility of flexible working arrangements within organisations emerged from the qualitative research as an important factor in their prevalence, giving employees confidence to approach their managers for flexibility. Visibility of flexible working often started with staff in leadership roles and other role models who were engaged with making flexible working practices successful, and establishing good practice, and this extended into small but meaningful observations about flexible work expectations, such as whether managers were emailing late at night. Union presence and their support for flexible working was another component in establishing its organisational acceptability.

Team culture was also important in contributing to a flexible workplace culture, with acceptance for, and collegial support around, flexible working easing its implementation. Sodexo had achieved this in its work around generational diversity, building shared workforce understanding for why team members might be needing to work flexibly at different points in the life course, and the organisation was consequently described as having developed "a flexible mind-set around flexibility" that was beneficial to looking at staffing at issues in new ways. Workplace culture was dynamic, and as the LGA noted, whereas a decade earlier flexible work had been regarded as mainly an issue for working mothers, now it was conceived much more broadly as relevant right across the workforce.

Finally, workplace policy could provide a powerful underpinning to organisational culture around flexible working, and even if it did not always translate into managerial action, it offered a framework through which managers could identify and support good practice. Sodexo provided all managers with training in managing flexible working arrangements, and their policy guidance offered a longer-term point of reference in negotiating operational details in reformulating working patterns, with their Human Resources department providing coaching around designing sustainable arrangements. It was common for the employers who were interviewed to have bespoke flexible working policy documents, widely publicised, which were reviewed to ensure that they continued to reflect operational concerns.

3.2.3 Current practice examples

As flexible working covers a large variety of arrangements, sometimes it can be more be more helpful to think of it in fluid rather than specific terms. Simple adjustments to routine working practices or expectations might not necessarily qualify as the kind of contractual differences that surveys measure, but give staff the flexibility to perform their

jobs successfully. For example, carers might have quite unpredictable demands on their time, which require them to vary their hours around unexpected needs, or some more straightforward accommodation that made a large difference to their effectiveness:

"It might sound very basic, but things like call centres where people say, "Well I take my mobile phone, have it on my desk, have it on silent." If I'm a carer and have some situation which may arise, I'm allowed to take that call."
Carers' organisation

Fresh thinking around job design and flexible working can also benefit customers. The carers' organisation gave the example of employees of utility companies who split their shifts in order at fit in caring duties, thus enabling them to work early and/or late which complements some customers' preferences to set up appointments with engineers outside of working hours. Islington Council talked about the high degree of informalised flexible working that went on within the council, from the 'nine day fortnight' to remote working: arrangements that were discussed with managers, but never formalised. Atkinson and Hall's (2009) qualitative research focusing on a computerised self-rostering system in an NHS Trust, underlined the importance of employers supporting a broad range of both formal and informal flexible working mechanisms in order to adequately reflect a broad range of employees' circumstances, and that doing so generated workforce reciprocity and goodwill.

Some organisations talked about flexible retirement or phased retirement in relation to older workers, and had bespoke policies around this, while others did not distinguish older workers' flexible working arrangements in terms of a managed transition out of the labour market. The local NHS Trust case study, which took the approach of having flexible retirement as a stand-alone practice, took the attitude that this gave it "an identity of its own" and made it easier for older workers to request.

Formalised flexible retirement tended to be organised around a reduction of hours, but this is often not suitable for employees who need to earn a certain income. The LGA, for example, observed that flexible working mobilised as reformulated work was more popular amongst older workers than flexible work that reduced hours, since salary reductions were a key concern at this life stage: "it's much more geared up to being paid the same, but working differently." Additionally, some employers have struggled more with accommodating reduced hours flexible work so may require support around developing flexible retirement schemes.

There was also a recognition that working past state pension age was an increasing trend for some groups of older workers with potential benefits for employers:

"We have been seeing, year on year, gradual increase in the number of people who decide to take their pension, and come back on some form of flexible retirement arrangement."
East Cheshire NHS Trust

Employers repeatedly mentioned that trialling flexible working arrangements was very useful, making necessary adjustments to ensure that it met the needs of both employees and the organisation. This can also help sustain flexible working.

Timewise reflected on the importance of individual managers driving through good practice on flexible working, more so than organisational policy:

"the employers where there is good practice happing, in the main, it is based on a good manager, and a good individual or good team coming together and finding new ways of doing things, as opposed to an organisation structural shift."

That being the case, it is essential that managers are given the support they need to facilitate sustainable flexible working arrangements. Similarly, the LGA made the point that organisational policy and the support of senior leaders were less key to making flexible working effective on the ground than enlisting managerial commitment.

3.2.4 Obstacles and challenges around flexible working

In view of the high degree of difference between desired and established flexible working arrangements, the research looked at some of the challenges for employers and the obstacles for older workers in acquiring flexible work.

Workplace challenges around flexible working for older workers are different in quality from those of employers. Part of the issue relates to older workers' positioning; expert interviewees highlighted how older workers sometimes feel vulnerable or expendable, a perception heighted by the age bias discussed in chapter 5. The carers' organisation explained that this could be a difficult conversation for older workers to initiate with managers, highlighting difference from the assumed normative way of working:

"if for some reason you need flexibility, you're see as less enthusiastic, less committed, less motivated, and that you're putting something else in front of your work commitments."

Consequently, older workers may enter into discussions about changing their work patterns at a disadvantage, or alternatively, not feel equipped to make that first step of making a request, as recent qualitative research on negotiating the right to request process has illustrated (Parry, 2017). The interviewee from the carers' organisation explained that the kind of vulnerability that older workers felt was the effect of a long term assimilation of attitudes around age, capability and value, summed up in Blume's assessment, "you're easier to get rid of if you're older." They compared the challenges for carers in the labour market as akin to those faced by women returning to work after maternity leave twenty years ago. Pearn Kandola talked about older workers' "psychological safety within the organisation" as a key factor in whether they felt there was a safe space to pursue a conversation about flexibility.

The NHS union rep felt that many employers had "not caught up" in terms of accommodating older workers' drivers around flexibility, in the way that they had with working parents. Complicating older workers' vulnerability was their knowledge that certain managers would refuse flexible working requests, regardless of organisational policy or individual circumstances, and employers were able to point to examples of this happening even within more broadly flexible workplaces. Older workers' difficulties securing flexible working in post are reflected in the academic literature, which has linked this to employers' limited managerial experience of implementing flexible working arrangements, as well as older workers' lack of knowledge of their options around flexible working (Barnes et al, 2009; Weyman, 2013).

Sometimes requests for flexible working are rejected, largely for reasons around job design and capacity. The NHS union rep explained that older workers could be unsupported in this, with unions often only becoming aware of applications further on in the process, "our officers would only get involved once it was at quite a high level of appeal, and I think a lot of people are put off even before they've even started." Qualitative research looking at the right to request process has identified a shortfall in employees' knowledge about how applications should be framed in business terms to maximise their chance of success, and the role that unions can usefully play in this process (Parry, 2017).

For employers, the challenges or barriers around flexible work included concerns around job design, lack of agenda or will on the issue, and managerial resistance. Job design was the most frequently cited of these, the issue being that managers struggled to conceive how current workload could be reformulated, performance managed, or how teams of employees working flexibly could complement one another. Indeed, the LGA interviewee reflected that it was managers of teams that they observed struggling with job design issues most of all, and that this was much more challenging that getting policy right or enlisting leadership support for flexible working:

"I think they [team managers] need training, they need coaching, they need guidance in terms of more outcome based and outputs, rather than inputs and trusting employees to do that work without necessarily seeing them all the time."

The LGA interviewee reflected on a concern among managers that where flexible working translated into reduced working hours, then managerial pressure would accordingly increase, "if you already manage a team of ten, and then you let them all work part-time, you've doubled your management workload really." She was keen to enlist mangers in job design workshops, to engage with these concerns and provide managers with the tools to respond to demands around accommodating flexible working.

The expert interviewees identified several sectoral issues where certain kinds of employers were more resistant to flexible working and where it was consequently less prevalent. For example, the carers' organisation noted that accountancy firms and legal firms framed

a need for staff to "work around the clock" as a rationale for a lack of flexible working practices. Sodexo reflected that the issues around flexible working varied across different parts of their organisation: customer-facing roles required certain hours to be staffed in one way or another, while many other roles did not require a fixed physical presence and were open to remote working. McNamara et al (2012), drawing upon US employer surveys in the public and private sectors, draw attention to sectoral differences in perceived barriers to flexible working. The authors pointed to private sector employers' greater concern about the cost of implementing flexible working. Given older workers' clustering in private sector SMEs in the UK, low-cost flexible work options are likely to be a priority for these employers and would be a place to target age-friendly interventions.

Job design blockages often stemmed from a lack of managerial training or support around redesign, and perhaps too from a lack of valuing of job design skills. In one sense this is a relatively straightforward difficulty to address, and evaluation of job design training in terms of older workers' retention would be a valuable addition to the field, and a resource in persuading organisations to offer this more routinely.

Some of the expert interviewees pointed to a lack of organisational agenda around flexible working at the moment, a gap that could make it very difficult for employees to then raise the issue unilaterally. A lack of precedence on flexible working, or apparent will on employers' part, made it challenging for employees to develop a case or point to examples of where working arrangements had been successfully changed. A lack of agenda around flexible work also affected the talent that employers could attract, inadvertently affecting jobseekers' decisions, as Timewise explained:

"if you ask candidates at any age they will say, "I'm not going to apply [...] because it's a game of chicken .. it's like do I apply then have a conversation, or do I have the conversation upfront about flexibility and risk not getting an interview.""

The LGA employee reflected that managers' reluctance to engage with flexible working sometimes related to specific working arrangements, most notably homeworking, and a lack of trust that targets would be reached without staff office presence. Where managers lacked experience of managing homeworking, support or training around developing alternative performance management techniques could be beneficial, as well as familiarisation with business information around homeworking. The NHS union rep also felt that there was a sense of a lag in managers' acceptance of the motivations that older workers might have for working flexibly, in comparison to working parents' needs that were more broadly accepted, "we've not caught up with that in some sections." One of the difficulties with managerial difference in attitudes to flexible working, is that is can lead to inequalities in the workforce in terms of older workers' access to and treatment in relation to flexible working, inequities that may have legal implications.

3.3 Promising approaches

As indicated by the qualitative evidence, making a success of flexible work across a diverse labour market is a complex challenge. There are issues around absence of buy-in or awareness of the business case for flexible working, managerial resistance, and lack of knowledge around job design and implementing flexible working arrangements. This section engages with some practical steps around how flexible working can be normalised, how older workers' awareness of flexible working and the mechanisms for accessing it can be improved, and how managers can be supported in offering and implementing flexible work. This is considered in terms of: flexible hiring, different flexible working options, developing managers' capabilities around flexible working arrangements and processes for making flexible work more sustainable. It draws upon a combination of qualitative evidence and evidence from the literature.

3.3.1 Flexible Hiring

Offering flexibility at recruitment can equalise labour market opportunities for older workers by opening up jobs, and also provide benefits to employers. These include increasing the likelihood of their being able to attract the best candidates, addressing in-post stagnation, and pre-empting earlier job design and innovation conversations. An ACAS report (Clarke and Holdsworth, 2017) talks about the value for organisations of using flexibility as a recruitment tool, and Hornung et al (2008) have highlighted the increased negotiation of personalised working arrangements by candidates (idiosyncratic deals, see 3.4). Flexible hiring might be strategically targeted at sectors known to be currently experiencing skills shortages, such as IT and engineering (Stewart and Bivand, 2016) and in enhancing workforce talent it offers employers longer-term competitive benefits. Furthermore, the dramatic sectoral variation in flexible hiring practice (Timewise, 2017), suggests that a tailored approach to convincing employers, taking in labour market concerns and trends, will be more productive than generic campaigns.

Timewise, who run their Hire Me My Way campaign around this issue, suggested that employers could be encouraged to engage with flexible recruitment by HR departments providing managers with recruitment templates that contained a flexibility option. Indeed, flexibility could be set as the default option on these, forcing employers to take an active decision in reverting to non-flexible recruitment practice. This kind of approach would be complemented by HR staff initiating conversations with managers that challenged their assumptions about how jobs should be performed within organisations. As a LGA HR department noted in the primary research, good practice needed to extend beyond policy: their organisation had already committed to advertising all posts as flexible, but since managers were not on board with engaging with this, the policy had yet to translate into anyone being appointed on a flexible basis. At the recruitment-focused policy roundtable organised for this research, there was broad consensus that older candidates were less confident at requesting flexibility at the hiring stage, so such action would provide an

important signal that these discussions were taken seriously by organisations and pave the way for a more open dialogue.

The Behavioural Insights Team (BIT) were also engaged with the idea that changing job adverts to frame positions as potentially flexible was a positive force in opening up the job market, and had recently conducted research (BITC, 2017) trialling templates with employers for use on the big subscription websites to explore how this could be achieved. This research, conducted with CIPD, emailed 25,000 HR professionals using one of four messages to see what effect these had on their likelihood of clicking on a link to find out more about flexible recruitment. They found that social norm wording (in this instance providing information that more employers were offering jobs flexibly) was the most effective in nudging employers towards flexible recruitment practice, a finding that indicates that a relatively small investment strategy in good practice can be impactful (Likki et al, 2017).

3.3.2 Flexible working options

There is a need for employers to offer a range of provision around flexible working arrangements, tailoring to the unique circumstances of older workers (Matthijs and De Lange, 2015) and to provide robust and sustainable flexible working arrangements. Reflecting this, the most effective workforce policy will be non-generic and adaptable to the multiple workforce situations onto which it might be mapped.

There is a socio-economic gradient in the availability of good quality flexible work (Phillipson and Smith, 2005). Tackling the deficit in flexible working arrangements for some employees is partly about establishing well-communicated protocols and procedures around flexible working arrangements to improve employee access to them. These might be publicised in a range of ways, for example, through workshops, newsletters and internal communications, as well as being embedded in workforce knowledge from the point of induction. Weyman's (2013) analysis of NHS employees (an older than average workforce) revealed that most had limited knowledge of the availability of local flexible working opportunities, or indeed how changing work patterns might affect pensions in later life, a gap that informs the proactive choices they are able to make.

The evidence too is that there is a substantial gap between desired and secured flexible working arrangements (Women and Equalities Committee, 2016). Organisational application processes around requesting flexible work can help address this shortfall by including built-in support for applicants to navigate the system (Parry, 2017), an aspect that is currently lacking. An important component in the successes of flexible working arrangements is organisational ownership of the process; Gardiner and Tomlinson (2009) found that flexible working arrangements were most successful where they had been taken on as a central part of organisational strategy. Key to ensuring that older workers feel sufficiently secure to request flexible work without damaging their occupational position is the longer-term work around building organisational cultures in which flexibility is mainstreamed. One way in which this can be supported is through ensuring that flexible working arrangements are visible at the senior level.

In terms of anticipating the changing needs of the workforce, good practice can be forged around normalising older workers' 'right to reduce' their working hours, potentially framed as phased retirement, and breaking down stigma around approaching managers for this kind of change in working arrangements. Flexible transitions into retirement, which can be organised in multiple ways, have associations with improved employee wellbeing, enhanced workforce planning, and retention of experienced staff (Johnson, 2011).

In addition to different formats of flexible work such as homeworking, compressed hours and flexi-time, it is useful for employers to engage with more irregular forms of flexible working arrangements, such as breaks and periods of special leave. Relatively straightforward workplace adjustments, informal flexibility, or one-off arrangements can be as beneficial as contractual change in particular circumstances, such as when older workers' situations are changing rapidly or unpredictably. For example, Islington Council had found that short periods of flexible working were a common workforce desire, and it could be unhelpful to proceed in implementation with a permanent mind-set. A common theme from the employer interviews was the importance of "flexible flexibility", and of employers reviewing flexible working arrangements to ensure that they continued to fit with older workers' needs. This theme ties in with the 'two-way flexibility' prioritised in Matthew Taylor's recent review of modern working practices (Taylor Review, 2017). Also notable is employer diversity, and the different approaches that will necessarily be optimal to developing good practice around flexible working; for example, Atkinson and Sandiford's (2016) qualitative research with small firms found that 'i-deals' (tailored to individuals) and ad hoc flexibility were a more common and less complicated way for SMEs to deliver flexible working than policy-informed approaches.

3.3.3 Developing managers' knowledge and capability

Developing managers' knowledge and capability in managing flexible working processes emerged as key in the qualitative interviews. This is about organisations recognising that managerial capacity does not automatically follow organisational will, and of the need to provide managers with accessible training and support on job design around flexible working arrangements, something that the qualitative research indicated was relatively scare at present. This will necessarily be sector-sensitive. Job design also needs to keep an eye on job quality that will be key to retention (Smeaton et al, 2009), for example, continuing to provide opportunities for training and development, since fulfilling work is particularly valued by older workers (Marvell and Cox, 2016).

Managers play an important role in achieving workforce and team buy-in to flexible working arrangements, which is key to enabling them to operate successfully on a day-to-day basis and for absorbing variability. Sodexo's approach focused on creating a climate for discussion to foster awareness of different life stage needs around work. They reported observing teams subsequently becoming more supportive and solution-oriented around flexible working, and were committed to further investing in their generations work. Further evidence of the effects of flexible working upon workforce dynamics are seen in

Clarke and Holdsworth's (2017) recent qualitative research for ACAS in public and private sector organisations, in which they found that flexible work enhanced individual and team effectiveness through encouraging staff to make greater personal investments in making working sustainable, as well as more collegial behaviour, both of which increased organisational productivity.

3.3.4 Job sustainability

As part of adopting a longer-term response to demographic change, some of the employers interviewed were thinking about future working patterns, and facilitating an open discussion of this with their workforce. For example, mid-career reviews and retirement courses both promoted a dialogue around work and change, which was beneficial to both older workers' and employers' planning, at least in the short term (Cohen-Mansfield and Regev, 2016) and would ideally be followed up with additional reviews.

Mid-life 'MOTs' were one of the key recommendations of the Cridland Review (2017), made available at least to older workers and key to their making informed choices about work and retirement. The Cridland Review (2017) intentionally broadened the framing of these from 'career' to 'life' reviews, and saw employers as playing a key role in facilitating these structured reflections in order to ensure that working conditions best complemented employees' plans. However, the Review (2017) also highlighted a gap in existing provision in taking the kind of holistic approach that they regarded as most productive. Age UK have been one of a small number of UK employers to offer mid-life career reviews or 'MOTs' to their employees; their experience has underlined the importance of their being offered from the age of 50, and of normalising this kind of reflective thinking among employees (Age UK, 2017).

Mid-career reviews were raised in the NHS expert and employer interviews, the NHS having seen major investment in workforce planning, and an awareness of staff using alternative strategies around working in later life (such as nurses moving into bank working) where lifelong jobs are no longer able to offer them satisfactory ways of working. It is to employers' advantage to be able to predict ways that staff are likely to vary their working throughout the life course and to plan accordingly, particularly if accommodating these needs has payoffs in terms of the retention of skilled staff. A representative from the NHS Working Longer Group explained of their approach: "it's not about when somebody's just about to retire – let's have a conversation to see if we can change their minds. It's a mid-career conversation." Flexible working arrangements potentially have a large role to play in mid-career reviews and it was acknowledged that while flexible working is commonplace in the NHS, it is also a unique working environment where shifts need to be filled with very specific skill sets that can be challenging to piece together. Further evidence of the employer benefits of a providing a broad career review process for older workers are highlighted by the National Institute of Adult Continuing Education (NIACE) (2015) analysis of career review pilots focusing on this age group: participants were subsequently more likely to take up training opportunities and to present as more motivated and productive employees.

An innovative training approach, which dealt in part with flexible working arrangements, was the training and support package developed and currently being tested by East Cheshire NHS Trust. This was aimed at mid-career employees to get them thinking about managing change, their priorities, and developing strategies around work: "to try and create a culture where it's actually safe and comfortable to start to consider different options, or reducing the responsibility, or reducing hours, or shifting focus or emphasis." The interviewee reflected that the small cohort who have been through the programme described their experience as

transformative, and there were plans to expand it. The training was preliminarily called 'Managing Career Transitions' but this was under review in terms of wanting to make it as inclusive as possible.

3.4 In Summary

- **Engaging employers in the business case for flexible work.** This underpins innovation and good practice. A key task will be providing employers with accessible (and quantifiable) evidence that extending practice around flexible work will have positive effects upon organisations like their own, particularly so in terms of retention.

- **Planning is key to ensuring that flexible working arrangements are robust and support older workers' job sustainability.** Key tools for building understanding and shoring up needs around flexible work are mid-career or mid-life reviews/'MOTs'.

- **Managers' knowledge and capability around flexible job design requires development.** This needs to reflect older workers' unique needs while ensuring that job quality is not sacrificed. Intergenerational understanding within teams is an important component in successful job design and an area for employers to support.

- **Flexible hiring is valuable both in terms of encouraging labour market mobility and in broadening employers' available pool of talent.** There is a need for policy to be supported within organisations, and for flexibility to be embedded in recruitment practice, for example, in terms of templates and in providing market comparisons around developing practice.

- **Different flexible working options are not currently equally accessible or known about by employees.** To extend the reach and fit of flexible work, employers can trial a range of flexible working arrangements, with the aim of making flexible work practice more sustainable. Key to this will be: publicising different flexible working arrangements, providing support to employees in navigating systems of applying for flexible work, offering phased retirement programmes to older workers as well as more ad hoc flexibility and promoting role models and champions of flexible working to improve its workforce visibility.

4. Maximising the benefits of age diversity at work

As older and younger workers increasingly work alongside each other, it is incumbent upon employers to recognise the opportunities, challenges and added value that **maximising the benefits of age diversity at work** can bring.

Drawing on the rapid evidence review, expert and employer interviews and the omnibus survey this chapter explores age diversity as a key component of age-friendly workplaces.

- Section 4.1 discusses why age diversity at work matters and the range of benefits and potential management challenges.

- Section 4.2 presents employers' age diversity policy and practice, highlighting the extent to which employers are strategically engaged with age diversity and ageing workforce issues.

- Section 4.3 presents evidence from the in-depth interviews to discuss employer awareness and understanding of the issues and provide examples of recent innovative practice and promising approaches.

- Section 4.4 summarises the key issues that employers need to address, pointing to evidence of which approaches have been effective in supporting age diverse workforces to achieve their potential.

4. Why age diversity at work matters

4.1.1 Context

The academic literature presents a complex picture in relation to age diversity in the workplace, with theoretical and empirical evidence of both benefits and challenges. Two key theoretical approaches which inform the diversity management literature, set out in Christian et al (2006) and Harrison and Klein (2007), are the social categorisation perspective (Tajfel and Turner, 1979, 1986; Turner et al, 1987) and the information/decision-making perspective (Mannix and Neal, 2005; Williams and O'Reilly, 1998).

Social categorisation theory suggests that diversity of attributes such as age can limit group cohesion and behavioural integration, foster conflict and compromise performance and morale (Williams and O'Reilly, 1998). It is argued that group members will, in some circumstances, use salient attributes to categorise themselves and others into in-groups and out-groups which can impede mutual collaboration, disrupt information exchange

and undermine cooperation (Hertel et al, 2013; Van Knippenberg et al, 2004). Belonging to an in-group (which consists, for example, of individuals of the same broad age group) can provide a social identity as members have more in common and, with similar attitudes and values, stronger interpersonal relationships (Schneid et al, 2016). Age-related stereotypes are also common and often, although not always, negatively biased (Posthuma and Campion, 2009; Rauschenbach et al, 2013; DWP, 2009) leading to prejudices and bias. By contrast, the information/decision-making perspective proposes that differences will enhance group performance by means of greater variety of resources (experience, skills, knowledge) creating more varied stimuli for the generation of ideas (Kunze, 2011; Kearney et al, 2009; De Dreu, 2006). High diversity in teams or other organisational units might therefore increase creativity, innovation, and problem solving. The theoretical assumption is that employees of different ages have unique strengths and weaknesses arising from variation in resources, perspectives and social networks (Bookman et al, 2012).

Given these competing perspectives it is unclear whether age diversity will produce favourable business outcomes at the aggregate level – much is likely to depend on context and how age diversity is managed. Studies that have analysed the impact of age diversity on bottom line performance and productivity outcomes exhibit ambivalent results (Christian, 2006; and Choi and Rainey, 2010) with examples of positive, negative and neutral effects (Ellwart, 2013; Gobel and Zwick, 2010; Schneid et al, 2016; Horowitz and Horowitz, 2007; Pelled et al, 1999; Ilmakunas and Ilmakunas, 2011). Some have begun to account for the mixed evidence, stressing the importance of context dependence both in terms of business setting (industrial sector or occupational demography) or team context (such as task complexity, interdependence of team's tasks or type of team including team duration) (Joshi and Roh, 2009; Wegge et al, 2012).

4.1.2 Benefits to business of age diversity

The business case for age diversity in the workplace is premised on three key arguments: effective **knowledge transfer, matching the age profile of customers** and the benefits associated with **bringing together different age groups** with a mix of experiences, ideas and ways of thinking.

Knowledge transfer
British employers may be well advised to look across the Atlantic for a taste of things to come. The American baby boomer generation are around ten years ahead of the UK, and, as noted by Baker (2015) "retirement will inflict the largest brain drain ever experienced by corporate America" resulting in the loss of technical skills and knowledge. As subsequent generations are smaller, knowledge transfer for sustainable business success has become a priority. To this end, businesses need to ensure age diversity, effective working between different age groups, and the successful transfer of knowledge. A CIPD survey of 578 senior HR decision makers in SMEs across the UK identified three key perceived benefits of an age-diverse workforce with knowledge-sharing the most commonly cited advantage (56% of respondents), followed by improved problem-solving (34%) and enhanced customer service (21%) (CIPD, 2014).

Several studies have highlighted that with age employees increasingly value opportunities for passing on knowledge and expertise (Deller et al, 2009; Truxillo and Fraccaroli, 2013). In one review of what older workers want and value in the workplace, a desire for both formal and informal opportunities to coach, train and mentor younger staff was identified (IES, 2016). Mentoring meets the needs of employers for information sharing and the transmission of skills to younger generations while also signalling to older workers that their skills are valued (Guglielmi et al, 2016). However, the exchange of knowledge and experience should not be seen as a one-way street, with 'reverse mentoring' also recognised as a valuable means of achieving mutual benefits from age-diverse workplaces. This form of knowledge sharing has been identified as a practice that employers are not yet sufficiently attuned to (CIPD, 2015).

Matching the age profiles of customers

With ageing populations, it is recognised that more age-diverse workforces can improve customer service and promote access to the 'grey pound'. McDonalds, for example, conducted a survey of 1,000 customers to assess the value of older workers to the business, finding that overall levels of customer satisfaction were statistically significantly higher in those restaurants with mature employees claiming: "our customers report a better restaurant experience when different generations are working together" (McDonalds, 2010). However, little detail is provided on the methodology of this survey and therefore any conclusions drawn should be tentative at best. Domestic and General (D&G) Group have also found that multigenerational teams in their call centres has reduced turnover and absenteeism and improved customer service by matching the age profiles of employees with D&G service users (Smeaton, 2009).

Age and skills complementarities

Combining diverse ages and generations can enable the sharing of ideas and interaction of individuals with different experiences, ideas and ways of thinking (CIPD 2015a, 2008). Gobel and Zwick (2010) find that establishments that have age-diverse teams are characterised by higher productivity among older and younger employees alike, possibly indicating important complementarity effects between age groups. The study suggests that firms could strategically combine employees of different age groups in working teams to balance strengths and weaknesses. While older workers can draw on a lifetime of experiences, younger workers may challenge outdated strategies and bring fresh perspectives. Insights from focus groups conducted by CIPD (2015) suggest that younger colleagues value the practical experience and expertise of older workers, while older colleagues appreciate younger groups for skills training and new working methods which may be gained from more recent training and education (in particular relating to IT and social media). The positive impact of diversity may be enhanced where groups conduct tasks that require innovation and complex decision-making as opposed to more routine functions (Wegge et al, 2012). Skills complementarities are also highlighted by psychological studies that demonstrate that 'fluid' cognitive abilities such as the capacity to reason and solve novel problems are optimal at younger ages, while 'crystallised' abilities, often demonstrated

through general knowledge and vocabulary, improve with age and accumulated experience (Skirbekk, 2008).

Socioemotional selectivity theory (Carstensen et al, 1999; 2003) emphasises resilience and adaptation, arguing that individuals adapt to ageing through shifts in goals and investment of resources. With time horizons narrowing, older adults increasingly focus on the present and emotionally meaningful activities. It is contended that older workers are thereby better able to adapt to change and cope with pressures in the workplace and maintain high satisfaction and wellbeing as they enjoy better regulation of emotions, exercise positive thinking more frequently and are less emotionally reactive to stressors, as measured by negative affect (Neupart et al, 2007; Randal, 2007; Uchino et al, 2006). Older age, it is suggested, can therefore 'buffer' against potential work stressors due to a greater range of coping resources (Mauno et al, 2013) which may benefit teams.

Barrington (2015) cites several sector specific studies that demonstrate that, contrary to stereotype, age-diverse workforces and higher proportions of older workers do not threaten productivity. For example, in a case study of a Days Inn call centre assessing just one measure of productivity – time per call – resulted in older workers appearing less productive, as they took longer on average to complete each call received. However, measuring productivity as revenue generated revealed a positive association between age and productivity because older workers brought in more revenue by being more successful per call and booking more reservations than younger workers (Barth and McNaught, 1991).

4.1.3 Potential challenges associated with managing age-diverse workplaces

In reviewing the literature, several sites of potential tension were identified, these revolved around: conflicting work-related values, stereotyping, age-discrepant management, managing career expectations and knowledge transfer obstacles.

Work related expectations and values

Different expectations and work-related values and attitudes in the workplace can create tensions (Holian, 2015; Hess and Jepsen 2009; Twenge 2010). Based on focus groups with different age groups a study by CIPD (2015) provides examples of how a lack of shared values and interests can cause tension. Friction is said to arise when colleagues feel that others are focusing on their own interests at the expense of the working environment, such as when younger employees exhibit a lack of interest or commitment, treating their job merely as a stepping stone, or where older employees are perceived as simply biding time or coasting until retirement. It is suggested that these sorts of issues are more prevalent in industries such as retail and customer services, where large numbers of younger workers are just passing through without the same levels of commitment or work orientation as found among longer serving older members of staff, giving rise to divisions and conflict. It is unclear how widespread this type of friction might be however, as the study was based on just two focus groups. As noted by Hertel et al (2013), high diversity often comes with a

need for superior communication, coordination, and conflict management due to potential differences in role expectations, working styles and general values.

A different set of 'expectations' challenges were identified in a study by Pricewaterhouse Coopers (PwC) (2011) that conducted an online survey in 2011 of 4,364 graduates aged 31 or below, of which 1,706 were PwC graduate recruits. The study quoted the views of an older recruitment manager who objected to 'Millennials'' impatient expectation of "promotion almost the minute they join". Participants were described as largely feeling comfortable working with older generations, but 38% said that older senior management "do not relate" to younger workers. Participants also stated that they thought that managers were not sufficiently competent with technology at work, and given that 41% of survey respondents said they would prefer to communicate electronically than face-to-face or by telephone, technology and communication can be a source of conflict or tension between generations.

The challenges associated with working with colleagues of different ages, which were cited most often as problematic by employees are interlinked, including "a lack of shared interests" (32%), "misunderstandings" (29%) and "a lack of shared values" (28%) (CIPD, 2014).

Social categorisation

Through a process of social comparison, individuals classify themselves and others into social categories using salient characteristics that are relevant in a specific context. Similarities and differences between team members form the basis for categorising oneself and others into groups, distinguishing between similar in-group members and dissimilar out-group members. As people tend to favour, trust, and be more willing to cooperate with in-group members than out-group members, diversity may thus lead to cognitive biases, discrimination, and emotional conflict in teams (Hertel et al, 2013; Wegge et al, 2012). An 'us and them' culture can be exacerbated by after-work socialising patterns which are "often a domain of the younger age groups, with older colleagues therefore excluded" (CIPD, 2015); there is little evidence, however, of how widespread such an age-based cultural divide might be.

Age stereotypes

Finkelstein et al (2015: 28) highlight the potential risks of stereotyping in the workplace, including "performance decrements (Kalokerinos et al, 2014), interpersonal conflict and discomfort across groups, including age groups". Posthuma et al (2012) identify six main judgement categories applied to older workers: poor performance, resistance to change, lower ability to learn, shorter tenure, more costly and more dependable. Age stereotyping is not directed exclusively toward older workers however. Finkelstein et al (2013) found that around 60% of younger workers' and 85% of middle-aged workers' descriptors of older workers were positive; attitudes toward younger workers were generally more negative.

Finkelstein et al (2013?) take this research a step further to consider whether employees worry about what people of other age groups at work think of their age group, referred to

as 'metastereotyping'. To understand age dynamics at work more completely, Finkelstein et al (2015:26) argue that "we must also focus our attention on the age metastereotyping process. Understanding interpersonal interaction in an organisation requires multiple viewpoints – not just what an age group believes about other groups, but also what they think those other groups believe about them".

Information about the disruptive power of age stereotypes and metastereotypes may be useful in diversity training; ACAS (2011) warns that stereotypical and potentially negative attitudes towards both older and younger workers remain prevalent among HR managers (Parry and Tyson, 2009) which is of concern given that these are the people tasked with designing and implementing age management policies.

Management of older staff

Tensions may arise when younger workers feel intimidated due to managing older workers, or older workers resent management from notably younger colleagues. A German study of 8,000 employees (Kunze and Menges, 2016) explored the dynamics of younger managers overseeing older colleagues in a range of industries, finding that around one quarter of such working relationships involved younger managers; where the age gap was larger employees reported more negative emotions such as anger. This evidence suggests that in some circumstances age disparity may give rise to negative 'resentment' emotions due to perceived status incongruence. Businesses need to be alert to such unintended consequences, as the study also found that companies experiencing more negative emotions had lower performance indicators. Solutions to age-related status incongruence might include addressing cultures around career timetables and status hierarchies.

Several employees interviewed in a CIPD study (2015) were currently managing older colleagues – they felt they had established good working relationships with the older staff they manage, but wished they had been provided with more advice and training at the outset. They initially found the experience "slightly 'awkward" and had a "sense of inferiority in this position".

Employers in a DWP study of 50 organisations (DWP, 2017) indicated some of the challenges for both parties when younger workers manage older ones – not only can older workers feel uncomfortable working for younger line managers or be less receptive to feedback from younger colleagues, but younger managers may also feel inadequately trained to manage older colleagues. None of the 50 case study employers provided training in age-management.

Succession planning

With higher numbers of older workers and a wider generational span, an ACAS report highlights managing career trajectories as an additional challenge for employers, trade unions and employee representatives advocating for different age groups, asking "How will employers manage the perception by younger workers that their older counterparts

are 'bed blocking' with older workers' desire to stay?" (ACAS, 2011). It should be noted that evidence suggests that older workers do not crowd out younger workers (Banks et al, 2010; Eichhorst et al, 2013) and, over the long term, increasing employment of older workers can lead to economic growth, increased demand and a further increase in jobs. The PwC (2011) study of graduates aged 31 or below, cited above, similarly highlights promotion prospects as a challenge for employers managing multiple generations. PwC conclude that businesses in the future face difficulties if younger workers move on quickly where their needs for advancement are not being met.

Knowledge transfer obstacles

Beckmann (2007) notes the challenges associated with efficient knowledge transfer – older workers may refrain from sharing their knowledge and experiences if they feel it will jeopardise their age-related competitive advantage within the firm or pose the risk of redundancy. Mentoring and coaching programmes should therefore be accompanied by relative job security. Group incentives might also promote willingness to transfer knowledge to other team members.

4.1.4 Incidence of key potential challenges associated with age diversity

The omnibus survey, conducted for this research project, was used to explore the incidence of some of the 'challenges' raised by the literature review, in particular: different age groups not mixing, conflict between different age groups and age gaps in management relationships causing discomfort (see Figure 4.1). Micro businesses with less age diversity had rarely come across these sorts of difficulties – just 16% said they had experienced any of them. At the other extreme, 37% of large employers (over 250 staff) and 22% of SMEs (10-249 staff) had encountered at least one of these issues. Focusing just on large employers:

- 10% reported different age groups not mixing

- 18% had experienced conflict between different age groups

- 22% experienced younger managers not feeling comfortable managing older workers

- 29% older workers had felt uncomfortable being managed by younger colleagues

Figure 4.1: Percentage of employers that have experienced the following intergenerational issues:

Legend: Large, SME, Micro
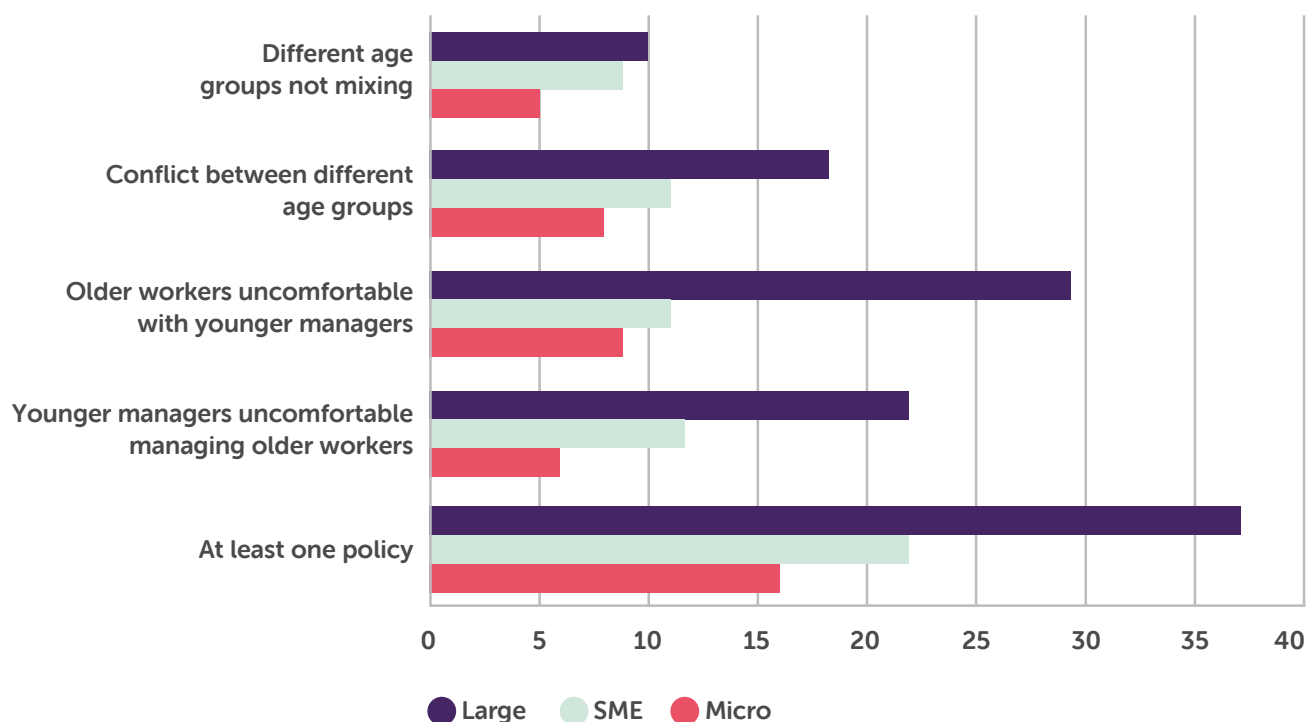
These figures suggest that employers need to consider age-diversity issues and how teams of different ages might best be managed to achieve positive business outcomes and good working relationships among employees. In the next section the report considers employers' strategic engagement with the ageing workforce and age diversity agenda.

4.2 Current employer policy, practice and perspectives

4.2.1 Employer readiness

Previous studies have investigated which workplaces have age-related policies and practices. Formal equal opportunities policies and practices are typically more common in public sector workplaces than in the private sector, and among larger workplaces (Van Wanrooy et al, 2013). Barnes et al (2009) and NIESR (2017), analysing the Workplace Employment Relations Survey (WERS) of 2004 and 2011 respectively, found 'pro-age' policies were more typical in larger, unionised workplaces, workplaces that make use of teams (which they suggest may reflect such employers recognising the benefits of age diversity), and were less common in male-dominated industries.

In a qualitative study of 50 employers across the UK (half of which were in low paid sectors including care homes, cleaning contractors, fashion retail and transport) employers said they valued the benefits of an age-diverse workforce, yet few were taking active

steps to change their policies and practices (DWP, 2017). The study indicated a lack of preparedness for an ageing workforce as an ageing workforce is not a strategic priority for most employers, few collect data on workforce age profiles for fear of contravening equal opportunities legislation, and line managers are not being widely trained to meet the needs of an age-diverse workforce.

The omnibus survey commissioned for this report asked employers whether the ageing workforce was currently on their agenda. Around one quarter of large employers said they were discussing ageing workforces strategically, while one fifth of SMEs were aware and considering the implications of ageing for their workplace. These comparatively low proportions of employers actively considering ageing workforces are reflected below (section 4.3) where employer and key informant interviewees repeatedly emphasise that ageing workforces and good practice in relation to age lag behind practice and awareness in relation to other characteristics such as gender and ethnicity.

4.2.2 Line manager support and preparation

Line managers are a central resource for building a workplace culture that nurtures inclusion and supports diversity. However, a CIPD (2014) study, based on two surveys, Employee Outlook (EO) and Labour Market Outlook (LMO) (with samples of 2,691 employees and 935 employers respectively) found negative views among employees in relation to the management of mixed-age teams with 23% describing their managers as 'ineffective' at promoting mixed-age team working. The study also found that 46% of line managers had received no training in promoting age-diverse teams, nor do their organisations have plans to introduce such training packages. Age diversity did not therefore, in 2014, appear to be at the forefront of corporate strategic thinking.

The omnibus survey asked employers whether they provide support, training or guidance for their managers in relation to:

- supporting flexible working

- building a pro-age diversity culture

- eradicating age discrimination

- supporting older workers and initiating conversations with them about their retirement plans and aspirations

- managing older workers

- age discrimination in access to learning

Findings are presented in Figure 4.2, which shows clear differences by employer size. Virtually all large employers (92%) support or train their managers in relation to one or more of these practices. Most (79%) SMEs are similarly supportive. Support is most commonly provided in relation to flexible working and encouraging cultures that value age diversity.

Somewhat less widely supported is the management of older workers and in relation to age discrimination in access to learning. Of course this does not tell us about the effectiveness of any of these activities.

Figure 4.2: Percentage of employers providing support, training or guidance for managers that address the following:
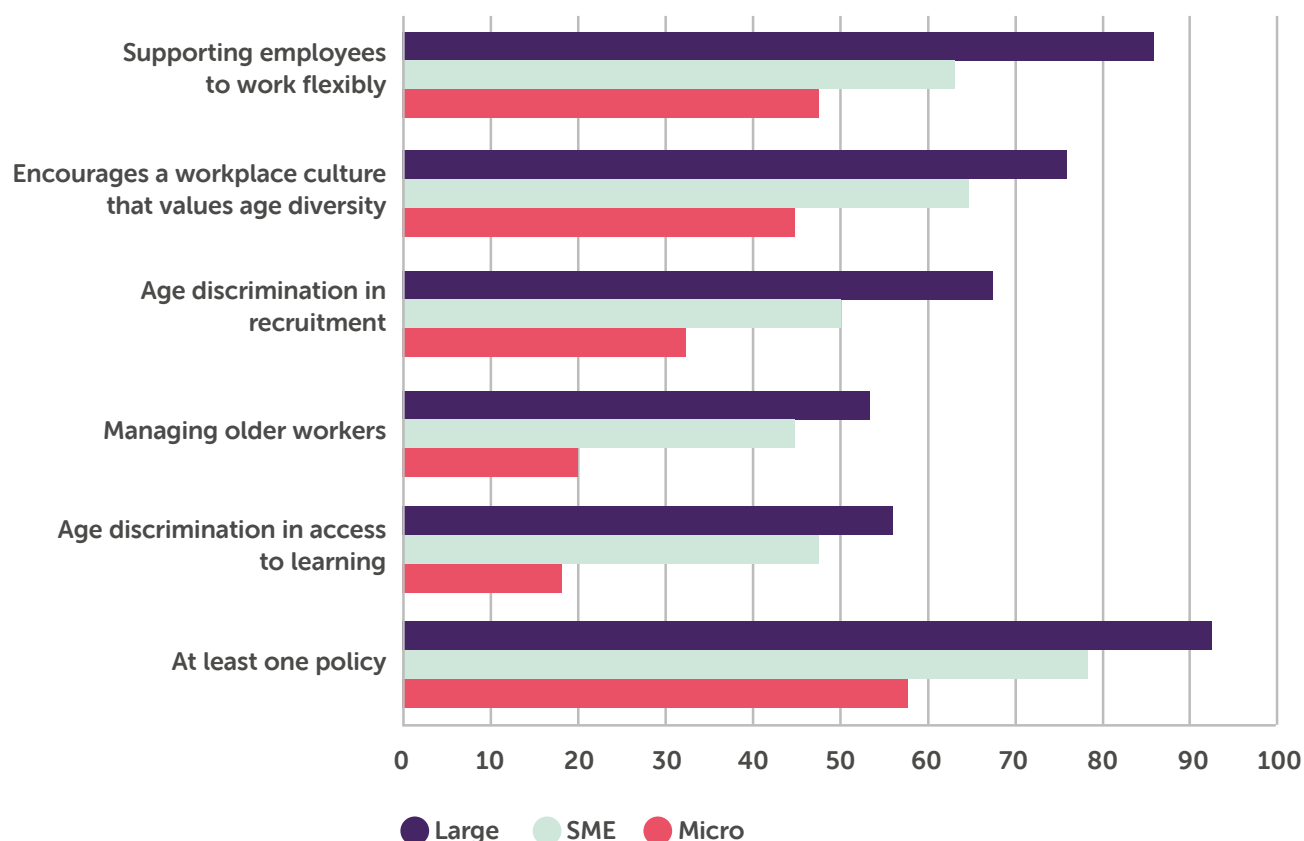

4.2.3 Prevalence of monitoring age diversity in the workplace

The omnibus survey examined the proportion of employers that monitor workforce diversity by age, both generally and in relation to learning and recruitment. Monitoring recruitment and learning for age diversity enables employers to identify whether some age groups are under-represented, possibly indicating the presence of discriminatory practices. The survey evidence shown in Figure 4.3 indicates that:

- Around one quarter of micro firms (29%) monitor for age diversity in at least one area, compared with 43% of SMEs and 51% of large establishments.

- Employers are most likely to monitor their workforce in general (47% of large businesses, 37% of SMEs and 23% of micro businesses).

- Around one third (35%) of large firms monitor recruitment, compared with 29% of SMEs and 25% of micro businesses.

- Employers are least likely to monitor age diversity in relation to learning opportunities (just 25% of large firms).

Figure 4.3: Percentage of employers that monitor workforce diversity by age in relation to learning, recruitment and in general:
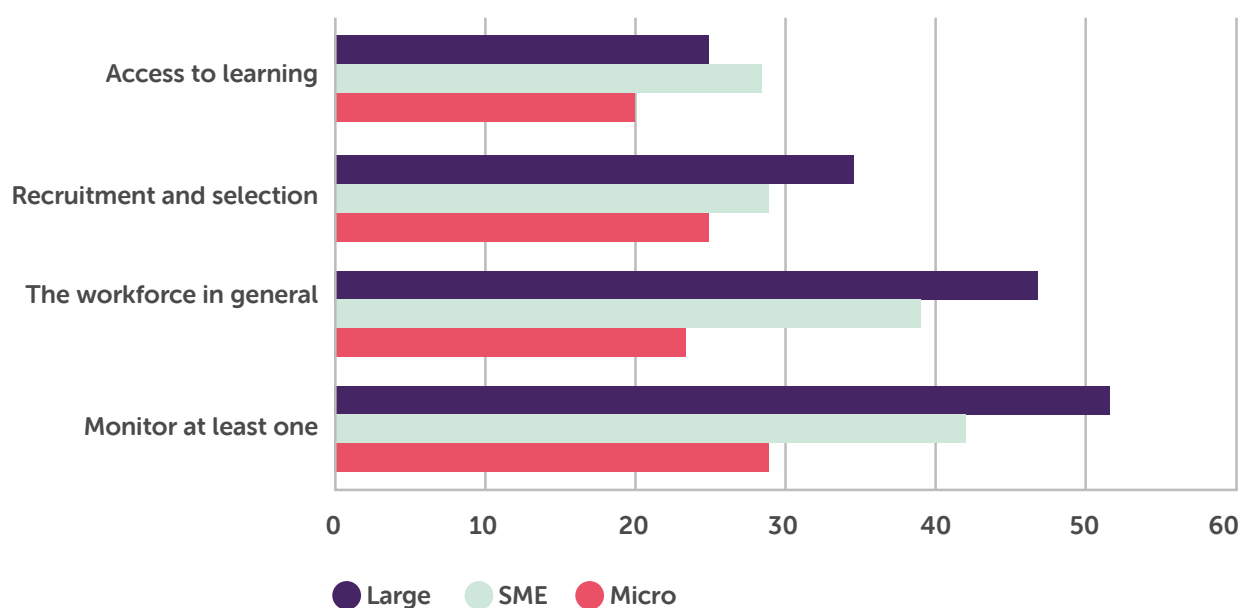
Systems of meritocracy are replacing more traditional systems of seniority. For example, pay progression is increasingly determined by appraisals and individual performance rather than length of service (Income Data Services (IDS), 2013). With less employer tolerance for poorly aligned performance and rewards, and therefore fewer 'safe havens' in late career, older workers are likely to be enduring more pressured working environments with implications for wellbeing. As systematic performance management and staff appraisal become more widespread, identical performance criteria and work expectations are applied to all staff regardless of age. This form of equality of treatment is described by Beck and Williams (2015: 271) as a significant departure from how different age groups have been managed to date.

4.2.4 Employer perspectives

Issues of employer awareness and current practice were explored in this study through expert and employer interviews to gain a deeper understanding of where and why particular practices were being used in workplaces, and where obstacles to change remain.

Engagement in the benefits of a multigenerational workforce was often sparked by concern to reflect an organisation's customer base. For example Barclays, who had extended their apprenticeship programme through the Bolder Apprenticeships initiative to pick up on a broader spectrum of trainees throughout the life course, observed that:

"our customer base is multigenerational, and what we need is people with life experiences in order to resonate and connect with our older generation customers."

Sodexo made an explicit link between generational diversity and the business case, and consequently saw intergenerational issues as underpinning their strategic work:

"it's not just about our employees, it's also around the people we serve, and so that gives us a really clear business case because we need our employees to reflect the people that they're serving, so that we can better understand their experiences and walk in their shoes."

However, intergenerational issues were not always viewed so positively. Pearn Kandola highlighted that they could be "coded around discussions of whether people fit in with the team, that's where I typically see it coming through." More broadly, while they observed some discussion around age diversity, they were sceptical it is priority for, or was being actively promoted by, employers:

"I do hear line managers talk about when they build diversity into their teams that they are looking for a little bit of age diversity, but I would also say I hear an awful lot of managers wanting a cohesive team, and their assumption around a cohesive team would be that they all need to have a very similar background, and age definitely plays into that."

They made the point that other aspects of demography remained a much more powerful propeller of the need to change than age:

"it would be usual to find a manager who isn't a bit uncomfortable if they had an all-men team, for example. But I don't think many managers are uncomfortable... if they had a team of 15 people, and they were all within a ten-year age bracket."

An organisation representing carers felt that while age diversity had broader strategic value at a macro level, in large part employers were not engaging on these terms, although the push for them to do so would increase in the future. Islington Council reflected that age formed a part of its diversity policy but was not an issue on which they were engaging more specifically, for example, in terms of training. This LGA, due to its labour market, had a relatively old workforce, and was conscious that younger age groups might be underrepresented. Similarly, an employer representative from the NHS Working Longer Group felt that age diversity, "happens by default rather than design." Barclays pointed out that momentum around age diversity was a gradual process; they were now seeing employer enthusiasm build as they observed the results of the Bolder Apprenticeship programme creating loyal, committed team members, and more were considering taking on apprentices themselves, "it has a domino effect." They anticipated that in the future the scheme would form an embedded part of the recruitment process, no longer regarded as something unique but as something that enriched diversity and strengthened customer relations.

Notably, language around this issue referred more often to 'generations' than to diversity or intergenerational relations, with employers repeatedly framing discussions in terms of Millennials, Gen X, Gen Y and baby boomers. The carers' organisation observed that this likely reflected the media's influence on the terms of reference, and indeed Sodexo's extensive work in this area was explicitly framed in generational terms, and they explained that "we felt it was a slightly more neutral language." However, there was also some discomfort with the terminology of generations, as an imperfect representation of interests. Pearn Kandola felt that it could reinforce stereotypes, although Sodexo felt that their work around generations encouraged employees to reflect on the meaningfulness of generational categories in different situations. The LGA suggested that talking in terms of distinctive generations was more of a human resources categorisation, which would not necessarily be replicated by individual managers. The terminology of 'mixed-aged teams' was not used by any of those interviewed, and expert interviews relied more on a mixed terminology of age diversity, inclusivity, and multigenerational workplaces.

Where age diversity was apparent within organisations, employers could point to a number of benefits. A large retailer explained the strategic value of a range of skill sets with which to respond to future demands:

"The benefits are that you're going to have a business that's going to be fit for the next 20 years, because you're going to enjoy the richness of colleagues that represent values, ethics. They're going to have different views and will help shape your business, and they will make sure and challenge you in some ways when you're not getting it quite right."

Sodexo felt that age-diverse teams enabled a greater sense of belonging among employees, using the metaphor of 'family' to chime with teams' intergenerational dynamics. Some employers spoke of the benefits of cognitive and skill set diversity, both in terms of skills transfer and in taking on different roles on projects – resources that could lead to innovation. For example, Sodexo explained:

"different ages will have different views on things. They will come up with different innovations to solve different problems."

Applied reiterated that diverse thinking was hugely valuable to employers, and the large retailer developed the point that teams' appreciation of one another's skills was beneficial in the development of mutual respect and effective working. Pearn Kandola, explained,

"if you are looking to avoid groupthink, if you are looking for really good quality problem-solving, or decision-making, actually age diversity is really one of the most important factors."

The occupational psychologists, however, were surprised that these kinds of considerations

did not feature more often in employers' staffing arrangements. In fact, the LGA felt that while the idea of mixed teams and skill sets was on employers' agenda, age was less often a part of these considerations.

Pearn Kandola described one of the benefits of age-diverse teams in terms of the "onboarding of new employees", assigning mentors with amassed organisational knowledge to new recruits, both enabling this experience to be transferred and providing an important role in post-recruitment retention. In reality, however, they felt that mentoring practices incorporated age as a function of seniority rather than as an intentional feature. Some expert interviewees also highlighted several potential challenges of age diverse teams. The NHS Working Longer Group flagged multigenerational tensions within health care teams as an issue that required heightened managerial attention in order to foster a more collaborative environment. The NHS Working Longer Group union representative reflected that there was an over-emphasis upon positioning older nurses as mentors, which simplified (and stereotyped) their experience. This was an issue around facilitation, of management being key to ensuring that the assets of mixed-aged teams could flourish.

Sodexo argued that the issues around managing intergenerational teams were mainly around subconscious bias, and ensuring that assumptions were not being made about employees' capabilities and talents based upon age stereotypes. As with any team management, Sodexo regarded establishing a common purpose, and planning how this could be achieved, as key. The NHS employer representative on the Working Longer Group similarly felt that the main obstacle to the effectiveness of mixed-aged teams was managerial ignorance and stereotyping around different backgrounds. In part this might be connected to the more limited data monitoring set up around age in many organisations, with age awareness consequently being underdeveloped in relation to aspects like gender and ethnicity.

Intersectionality as an issue did not emerge from the interviewees as an issue high on employers' radar at present, with different aspects of diversity mainly being considered separately. However, Applied, who had developed a platform to overcome recruitment bias (see section 2.3.2), pointed to evidence that more forward-thinking organisations are starting to think in intersectional terms, albeit that momentum behind age was still lagging.

The issue came up repeatedly that age had some way to go to catch up with diversity thinking around gender and ethnicity. Some of this was tied up in fear of legal sanctions, which were felt to be less developed on age. An NHS interviewee reflected that intersectional thinking had the capacity to drive forward issues that were currently not framed to take in the nuance of experience:

"there are initiatives around gender and race, but I'm betting that older females, older black and minority ethnic people have a different perspective on that. It's one of those things, isn't it, age is something that happens to everybody. So what we could learn from it."

Examples of issues that were raised as benefiting from intersectional analysis, with age as an embedded part, were pensions and discrimination, with good quality employee data essential in improving these. For example, an expert interviewee pointed out that the pension contributions of many black and minority ethnic female nurses were lower than their white counterparts, having been stuck in lower pay bands throughout their working careers with fewer development opportunities.

An issue raised in several of the case study organisations was that menopause remained "a taboo subject in the workforce." The failure of organisations to respond to the significant difficulty that menopause presents for an estimated one in ten women (Brewis et al, 2017) provides some indication of the lack of practical support in the workplace around age diversity. Business in the Community (BITC) have produced a menopause toolkit and Menopause in the Workplace provides bespoke support to employers around policy and practice, as well as networking and information-building events. At present, tribunals have often provided the motivation for organisations to take positive action around menopause policy, however a more proactive approach would probably address issues around team climate and retention. The NHS Trust initiated health 'MOTs' for women, using an external provider, after occupational health data raised issues around menopause and work, with good take-up rates. The interviewee from Menopause in the Workplace reflected that presenting employers with the business case for action, framed in terms of demographics, retention, absence and tribunal costs, was key to persuading employers that the issue had currency as a part of their diversity work, and in engaging them on issues like flexible working arrangements.

4.3 Promising approaches

4.3.1 Monitoring age diversity in the workplace

Recent studies would suggest that while employers may pay lip service to the value of age diversity in the workplace, and may be aware of the impending challenges associated with ageing workforces, few are actively taking steps to adequately monitor staff profiles and adapt their policies and practices (CIPD, 2014; DWP, 2017). Fear of contravening age equality regulations has deterred employers from monitoring the age distribution of their workforces and taking steps to balance their staffing (ACAS, 2011).

Age diversity monitoring is recommended to better understand workforce age profiles, more effectively plan for the future, and to assess whether discriminatory practices might be affecting processes of recruitment, promotion, training or other staffing decisions (DWP, 2015; ACAS, 2014). A lack of monitoring can undermine age diversity strategies (McAndrew, 2010). Barnes et al (2009) found that few workplaces actively monitored their recruitment practices for age discrimination, even those who had age-specific policies in place. This monitoring was most common in Local Authorities (Age UK, 2008). In a survey of 65 London employers, nearly half used external recruitment agencies, but only a small

proportion of these monitored the agency's application of age diversity practices (Age UK, 2008). In a survey of their members about age monitoring practices, ENEI (2015) found that most members had produced an age profile of their employees, but the purpose of this practice was not evident given that only a minority said they had age related targets (whereas a majority had targets for race and gender).

Regardless of their engagement with the benefits of intergenerational diversity in workplaces, in large part the experts and employers interviewed felt that team formulation was not the result of conscious effort, but more often dealt with on a case by case basis in recruiting to vacant posts, with teams evolving over time. However, teams could be convened for particular projects. The LGA reflected:

"if you're creating a new team its's quite easy to have that balance, but when you've got a team already, and if your turnover is quite low, and the average age in local government, most people are between sort of around the 45 to 55 mark, then it's quite hard to sometimes have that mixed team ability."

In Barclays this process was more active, partly because of the need to reflect broader society, and age was a key dimension of this alongside talent and development potential. Organisations with customer-facing elements more often reflected on the need to develop intergenerational teams that customers could relate to. One interviewee from the NHS Working Longer Group felt that the current recruitment climate in health care was not lending itself to strategic planning on age diversity or other factors, "they just consider themselves lucky to have anybody, quite honestly", indicating the importance of economic factors in workforce practice.

Case Study: encouraging new thinking around generations

Sodexo adopted an inter-generational approach to workforce dynamics through their Generations and Employee Network Group, which set generation as its priority area. This was complemented by a board game called GenMatch, specifically designed to enhance intergenerational understanding in the workforce. It was hoped that by providing a unique space for discussions around age, perspective, difference and need, playing this game would help to build better collegial understanding. GenMatch was made available to Sodexo's workforce throughout the UK and launched accompanied by webinars, blogs and a social media campaign.

While not formally evaluated, Sodexo had observed a number of positive impacts from a workforce playing the game that were encouraging the company to continue to build their generational approach. Discussions of generational issues had become more apparent on social media and managers reported witnessing enhanced team dynamics:

"It was helping everyone to understand some of those generational differences, and to think about how they might adapt their style and approach with colleagues. Have those honest conversations about what's working and what's not working in relationships and in teams."

Subsequently, membership of the Network had increased by a quarter. Beyond quantitative measures, Sodexo felt that the initiative had positioned diversity and inclusion in the workforce as "something that is for everyone", with generation and age at the centre of this, and improved buy-in to organisational diversity policy. In practical terms, managers talked about enhanced team commitment to flexible working arrangements, and organisationally the approach was attracting interest from clients, alongside a broader cultural shift and embedding of the concept of generation at a business level in the organisation: "we're seeing that language in the business thought-process, which I don't think was there before."

Sodexo argue that GenMatch makes the concept of generation more tangible, enabling managers to useuse it specifically to foster team-building. The company also developed a one-day management training programme called The Spirit of Inclusion. This looked at age and generation, but also other intersectionalities, to enhance managers' understanding of the different perspectives and needs of different segments of their workforce.

Much of the age monitoring that interviewees reported on was driven by statutory requirements, with it being the exception rather than the norm to go beyond this baseline. This limited the analysis and forecasting that employers were able perform, and several of the expert interviewees reflected that age diversity was currently so far from most employers' agendas that a mandatory push was necessary to improve practice.

4.3.2 Tailoring support for workers of different ages, and being confident in applying age employment legislation

There is a strong evidence base on the idea that workers of different ages may have different needs, warranting age-tailored management practices. Shifting preferences and needs associated with age and life stage have been widely identified in the literature, with considerable evidence that intrinsic job characteristics, good workplace relationships and a need for recognition increase in importance with age, while extrinsic aspects (such as pay and promotion) become de-prioritised (Bown-Wilson and Parry, 2013; Finegold and Spreitzer, 2002; Kanfer and Ackerman, 2004; Ng and Feldman, 2010; Ng and Feldman, 2008). In a study of three public sector organisations, Kooij et al (2013), controlling for job tenure, similarly found that older workers exhibit stronger job security and intrinsic work motives and focus less on promotion and growth (including training and taking on new tasks) concluding that work related motives, and therefore the utility and impact of HR practices, change with age. Freund (2006) also observes a shift in focus from promotion and advancement at younger ages, to preservation at older ages.

However, there is anxiety among employers that formal and informal practices may infringe age discrimination legislation. As a consequence, studies have found that employers are reluctant to tailor their policies and working arrangements to meet the needs of different age groups (Harris et al, 2011). This reluctance to provide age-tailored solutions can, for example, effectively close down later life opportunities and 'safe havens' that might traditionally have allowed employees to age and adapt within a workplace (Vickerstaff, 2015). In a similar vein, ACAS have noted that employers feel the need to demonstrate that all groups in the workforce are treated in an identical manner without any tailored support. This mistaken interpretation of the legislation may act as a barrier to proactive approaches to age management and hinder dialogue that explores older workers' career preferences. (ACAS, 2011).

4.3.3 Creating age-friendly workplace cultures

It is not simply age diversity that determines performance – instead it is the views and behaviours of colleagues and these can be modified through workplace culture. Team climate, age salience and appreciation of age diversity can all influence group cohesion and performance outcomes. Promoting inter-group contact between different age groups at work is one approach that can encourage group cohesion where age stereotypes or prejudice may be present. Although not specific to age diversity, insights into the potential benefits of promoting inter-group contact can be gleaned from a meta-analysis of observational and experimental studies which found that intergroup contact reduced prejudice in the vast majority of the 515 studies reviewed, with the contact effect applying to a broad range of minority groups including older people (Pettigrew and Tropp, 2000).

While there is a dearth of evaluations that demonstrate 'how to' ensure effective working within age diverse contexts, there is evidence of associations between particular practices and positive business outcomes. One evaluation studied 745 natural teams with 8,848

employees in three different German industries (Wegge et al, 2012). Analyses highlighted both significant advantages and disadvantages associated with age-diverse teams for the following outcomes: performance, team identification, job satisfaction, wellbeing and innovation. Key preconditions identified for effective age-diverse teams included: high task complexity, low age salience (i.e. low awareness or low perceived relevance), high appreciation of age diversity, a positive team climate, low age-discrimination and the use of age-differentiated leadership. Based on emergent insights and study findings Wegge et al (2012) developed a new management training programme that informed attendees of: the nature, development and consequences of age stereotypes, the benefits of age differences and strategies to combat stereotyping. The training was evaluated and found to reduce age stereotypes and team conflicts and enhance innovation.

HMRC similarly took a multi-stranded approach in 2013 to raising awareness and challenging unconscious bias around different age groups including the establishment of a working group and dissemination of learning to dispel myths about age across the workforce (CIPD, 2015). A range of myths and preconceptions relating to different generations were surfaced, leading to an Age Summit that presented data to de-bunk a variety of myths about age. Further dissemination was undertaken to reach the entire workforce via the HMRC intranet and staff magazine. Managers may therefore benefit from learning to identify the common age stereotypes (such as poor performance or resistance to change) and to know the evidence that refutes them.

4.4 In Summary

If well managed, age diversity in the workplace can bring about business benefits in providing: **knowledge transfer, matching the age profile of customers and with bringing together different age groups** with a mix of experiences, ideas and ways of thinking.

However, several sites of potential tension were also identified, these revolved around: conflicting work-related values, stereotyping, age-discrepant management, managing career expectations and knowledge transfer obstacles. The omnibus survey, conducted for this research project, showed that the most prevalent challenges were: different age groups not mixing, conflict between different age groups and age gaps in management relationships causing discomfort.

This suggests that employers need to consider age diversity issues and how teams of different ages might best be managed to achieve positive business outcomes and good working relationships among employees.

Promising approaches to maximise the benefits of age-diversity at work include:

4.4.1 Monitoring age diversity in the workplace

Employers need to first understand the age profile of their own workforces in order to enact change. Age diversity monitoring is recommended to better understand workforce age profiles, more effectively plan for the future and to assess whether discriminatory practices might be affecting processes of recruitment, promotion, training or other staffing decisions. A lack of monitoring can undermine age diversity strategies.

4.4.2 Tailoring support for workers of different ages, and being confident in applying age employment legislation

There is a strong evidence base on the idea that workers of different ages may have different needs, warranting age-tailored management practices. However, there is anxiety among employers that formal and informal practices may infringe age discrimination legislation. As a consequence, studies have found that employers are reluctant to tailor their policies and working arrangements to meet the needs of different age groups. This mistaken interpretation of the legislation may act as a barrier to proactive approaches to age management and hinder dialogue that explores older workers' career preferences.

Employers might consider an age-tailored approach when managing staff and conducting performance appraisals rather than a one-size-fits-all strategy. Career conversations can help to support job-person fit, identify training needs and ensure jobs are sustainable over the longer term. This includes better **recognition of age specific issues**. Menopause is one key example, with most employers failing to respond with any practical support in response to this difficulty. The NHS Trust has initiated 'MOTs' for women, organised through an external provider and these have received good take-up rates.

4.4.3 Creating age-friendly cultures

Creating age-friendly cultures at all levels of an organisation are important with team climate, age salience and appreciation of age diversity all influencing group cohesion and performance outcomes. Promising approaches include:

- **Intergroup contact.** Promoting inter-group contact between different age groups at work is one approach that has been found to encourage group cohesion where age stereotypes or prejudice may be present.

- **Team management.** Issues around managing age-diverse teams often relate to subconscious bias, and management can act to prevent or overturn assumptions about employees' capabilities and talents that are based upon age stereotypes. Establishing a common team purpose can also promote group cohesion.

- **Challenging attitudes.** Innovative approaches can help to change subconscious attitudes, for example Sodexo's board game, specifically designed to raise awareness and improve understanding between different age groups in the organisation.

- **Training to reduce age stereotypes.** If well designed and effectively delivered, training can also reduce age stereotypes and team conflicts and enhance innovation.

- **Tapping into employer language.** Notably, the language used by employers when discussing age diversity referred more often to 'generations' than to mixed-aged teams, diversity or intergenerational relations, with employers typically framing discussions in terms of Millennials, Gen X, Gen Y and baby boomers.

5. Conclusion

In order to promote fulfilling work later in life, the Centre for Ageing Better has been working with leading employers to support organisations to become 'Age Friendly'. Three key issues have been identified that can improve the opportunities and working experience of older workers, with associated benefits also accruing to employers. These are: reducing age bias in recruitment, promoting good quality flexible work and maximising the benefits of age diversity at work.

Most employers have policies relating to age discrimination and policies that can support older workers, yet a sizable proportion feel their organisation is unprepared for the ageing workforce and issues between generations still exist. The omnibus survey shows that:

- One in five employers (20%) believe that the ageing workforce is being discussed strategically in their workplace.

- Nearly a quarter (22%) of employers think that their organisation is unprepared for an ageing workforce.

- Two thirds (66%) of employers (and 96% of large employers) have at least one diversity or equal opportunity policy in relation to age discrimination.

- Nearly a quarter (22%) of employers have faced issues with managing age diversity at work, most commonly with older workers feeling uncomfortable working under younger managers.

5.1 Why do these topics need attention?

The business case for age diversity in the workplace is premised on three key arguments: **effective knowledge transfer, customer-employee alignment** and the benefits associated with bringing **together different age groups** with a mix of experiences, ideas and ways of thinking.

As the Baby Boom generation approaches the end of their working lives, employers are facing a widespread loss of skills and experience. Retaining these workers and reversing the early retirement culture of the 1980s and 1990s has been a government priority with age discrimination legislation, abolition of the default retirement age and a rising state pension age introduced as key policy levers. Employers are critical in influencing how and when people retire (Vickerstaff, 2006). Good management of age-diverse workforces, fairer recruitment practices and flexible working opportunities are therefore important components in the wider drive to improve the retention of older workers and enlarge the talent pool from which employers can recruit.

5.1.1 Reducing age bias in recruitment

Diversity has become a goal for many UK employers, driven by labour shortages and demographic change but despite progress the recruitment process is still fraught with problems for older workers and there remains considerable scope to implement more robust systems to prevent age bias and widen the talent pool for employers. Stereotyping, age typing of jobs and homophily – or picking candidates that are similar to ourselves – continue to represent obstacles for employers seeking to recruit the best talent available and achieve balanced diversity.

5.1.2 Promoting good quality flexible work

For older workers, more flexible working arrangements can support those with caring responsibilities or health difficulties. Many carers give up or cut back on their paid work commitment to provide eldercare, and this has implications for employers in terms of skills availability. Older workers may also be seeking to balance paid work with looking after grandchildren. Health or physical changes may also drive changing priorities around work; people aged over 50 often favour a reduction in hours to prevent stress, fatigue or the onset of other physical ailments that may be associated with manual working. The downshifting of hours or responsibilities and other flexible working solutions can ease the transition to retirement on a more gradual basis and prevent early retirement.

5.1.3 Maximising the benefits of age diversity at work

Teams and working groups will become increasingly age-diverse given the upward trend in employment participation among older workers. Employers need to be aware of and prepare for age diversity by means of age monitoring, management training and appropriate age-tailoring of policies and practices. In this way business can reap the potential productivity and innovation gains while avoiding potential workforce tensions.

5.2 Employer policy and practice

5.2.1 Reducing age bias in recruitment

Fairly high proportions of employers have formal equal opportunities policies relating to age and recruitment but gaps between policy and practice remain. In addition, the impact of implicit or subconscious bias on hiring outcomes is unknown and can be hard to eradicate by means of formal written policies. Expert practitioners interviewed suggested that employers' age biases and stereotypes are largely unrecognised and not interrogated in the way that biases around gender and ethnicity are. One challenge is the quality of age-related data currently being collected at an organisational level, which is important in developing the evidence case for change.

Progress has been made, however, toward de-biasing recruitment systems such as taking care over question wording in adverts, removing age from application forms and some

use of automated systems to create shortlists. The interview stage, conversely, remains largely unchanged, often still loosely-structured and with decision-making concentrated in individuals with little accountability for outcomes.

5.2.2 Promoting good quality flexible work

The legislative climate around flexible work has driven many employers' policy and practice, with the right to request flexible work becoming a universal right in 2014. Large employers are more likely to support staff working flexibly, sectors such as retail and health and social care have higher levels of flexible working, and part-time working increases among older workers. Nevertheless there is a large shortfall between desired flexible working patterns and established practice. The interviews revealed significant incidence of informal flexible working practices within organisations, which makes flexible working difficult to measure. An important distinction in terms of how flexible work was managed was whether it represented a reduction or change in working hours.

Multiple factors drove older workers' demands for flexible work, which necessitated a range of organisational responses. Employers' commitment to flexible working practices reflected their buy-in to the business case for flexible working, and, in particular, its effects upon the retention of older workers. Barriers to flexible working included older workers' feelings of vulnerability around raising their need to change the way they worked, sectoral working norms, managerial resistance, job design difficulties and lack of organisational will to support the flexible work agenda.

5.2.3 Maximising the benefits of age diversity at work

Formal equal opportunities policies are typically more common in the public sector and among larger unionised workplaces, and less common in male-dominated industries. Gender and ethnicity continue to dominate the inclusion agenda with age equality lagging behind. Broadly, most employers are not yet strategically engaged with ageing workforce issues and few employers collect robust data on workforce age profiles. Employers are reluctant to tailor their policies and working arrangements to meet the needs of different age groups for fear of contravening equal opportunities legislation.

The qualitative research indicated that for most employers there was little active engagement with age diversity or formalised planning around team formation. Conversely, employers who were taking action on this issue described benefits in terms of customer satisfaction, cognitive diversity, skills transfer and enhanced team climate. Employers who invested in data monitoring in age were able to identify future workforce trends and to develop responsive policy around these.

5.3 Promising approaches

The UK labour market is diverse and changing, with older workers being particularly clustered in SMEs, and working in very different ways. Age friendly-workplace practice will necessarily be diverse, reflecting different organisational climates and resources. This report has presented a selection of initiatives that are currently being trialled and developed around age-friendly workplace practice, which are providing employers with positive business impacts as well as enhancing the working experiences of older workers.

5.3.1 Reducing age bias in recruitment

Training – evidence suggests that training can be effective in reducing biased practices especially if it is: more focused on behaviour change than attitude change, presented as voluntary rather than mandatory, face-to-face and interactive rather than online courses.

Diversity champions – establishing responsible parties is most effective in securing change and promoting diversity. To achieve specific diversity goals, a productive approach is to assign responsibility for achievement of those goals to a diversity manager, champion or taskforce, and encourage buy-in and engagement among champions and the wider workforce.

De-bias the application stage – online application processes can automate the initial sifting phase to ensure unbiased assessment of applications. It is possible, however, that online only applications may exclude some older groups. Where processes are non-automated, it is good practice to remove fields requiring age/date of birth information and consider whether requirements discriminate against older age groups (for example, inclusion of UCAS entry points as selection criteria – fewer older workers hold higher education qualifications).

Advertising – evidence suggests the following guidelines can improve the application rates of older workers:

- Content should be written to be age-neutral. Software exists to help employers write effective advertisements, free from bias. The software can also check the language used in job descriptions for biased/exclusive words and phrases.

- Avoid language that implies a preference for particular age groups, such as 'energetic' 'mature', 'enthusiastic', 'highly experienced' or 'recent graduate'.

- Job titles should be considered carefully, with titles such as 'Office Junior' being dropped in favour of more inclusive ones, such as 'Office Assistant'.

- Location – place advertisements in publications read by a range of age groups or use radio advertising.

- Remove age limits in relation to jobs and apprenticeships. Avoid references to age and 'number of years' experience' in job advertisements.

- Take care in choice of accompanying images to avoid implicit suggestion of preferred age groups.

5.3.2 Promoting good quality flexible work

Flexible by default – making jobs flexible at the point of hire will open up the job market for both older workers and employers and start to normalise organisational culture around flexible working.

Job design – bespoke training and in-house support around redesigning individual roles will give managers the tools to respond to flexible work demands, encourage innovation in problem-solving, and support employers' concerns about their workload in managing flexible teams. Internal sharing of good practice and templates around flexible working would provide valuable resources to managers.

Flexible retirement policy – written, accessible policy, containing a range of flexible working options will increase older workers' access to flexible working, normalising the idea of changing one's working patterns in the run-up to retirement. It will also enable employers to engage in better workforce planning by extending and making transitions out of the labour market more predictable.

Flexible work trials – setting up flexible working arrangements that are later reviewed helps ensure they are working for both parties, and thus makes them more sustainable. This would enable staff to move in and out of flexible working as their circumstances change, and keep the dialogue between employee and employer more open. Complementing this, it is important to keep flexible working arrangements under review and to encourage a dialogue around them, since older workers' circumstances may change and adjustments may be needed to ensure that they continue to work for both employer and employee.

Mid-career reviews – reflecting a recognition that life course demands affect work, mid-career or mid-life reviews enable employees to engage in longer-term thinking about how their working patterns might change, information that will be valuable to both themselves and employers in planning, and will support more sustainable working practices.

5.3.3 Maximising the benefits of age diversity at work

Intergroup contact – recruiting people similar to ourselves remains a key obstacle to the creation of age-diverse working teams with an assumption that a cohesive team is composed of people with similar backgrounds, including age. Promoting inter-group contact between different age groups at work is one approach that has been found to encourage group cohesion where age stereotypes or prejudice may be present.

Team management is critical – issues around managing an intergenerational team often relate to subconscious bias, and management can act to prevent or overturn assumptions

about employees' capabilities and talents that are based upon age stereotypes. Establishing a common team purpose was also identified as key for group cohesion.

Challenging attitudes – innovative approaches can help to change subconscious attitudes, for example Sodexo's board game, specifically designed to raise awareness and improve understanding between different age groups in the organisation. These aims were demonstrably achieved through the visible discussions of generational issues, enhanced team-building observed by managers and improved workforce buy-in to diversity and inclusion policy.

Training – if well designed and effectively delivered, training can also reduce age stereotypes and team conflicts and enhance innovation. For example Sodexo's one-day management training programme called The Spirit of Inclusion looked at age and generation, but also other intersectionalities, to enhance their understanding of the different perspectives and needs of different segments of their workforce. HMRC have similarly used training alongside the establishment of a working group to raise awareness and challenge unconscious bias around different age groups and dispel myths about age across the workforce.

Age-tailored management – recognition of age-specific issues are also critical for staff retention. One example of an age-specific issue is menopause – most employers fail to respond with any practical support to the significant difficulties at work that one in ten women going through the menopause experience. Recent approaches include provision by BITC of a menopause toolkit – Menopause in the Workplace provides bespoke support to employers around policy and practice, as well as networking and information-building events. The NHS Trust case study had initiated 'MOTs' for women, organised through an external provider, as a result of occupational health data raising issues around menopause and work, and these had received good take-up rates.

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Appendix 1: Methodology

Methods

The study used a multi-methods approach including: a rapid evidence review; primary research with employers, intermediaries, and experts; and an omnibus survey. It was also supported by processes designed to test interim findings and engage with employers' ongoing concerns including an employer summit and 2 roundtables. The key research questions were:

Age diversity:

- To what extent are organisations already actively managing age diversity within teams?

- What are older workers' experiences of working in mixed-age teams?

- What promising approaches exist that help to maximise the benefits of age diversity and what approaches does the evidence suggest are effective in managing mixed-age teams?

Flexible working:

- What is the prevalence of flexible working amongst older workers (including as compared to the general working population)? What kinds of flexible working are being utilised by older workers?

- What are the challenges faced by older individuals in asking for, getting, and participating in flexible working? Do older people experience specific barriers to flexible working?

- What factors within organisations influence the prevalence/extent of flexible working?

- What approaches does the evidence suggest are effective in supporting flexible working arrangements for older workers?

Recruitment bias:

- To what extent is older age bias (including unconscious bias) a factor in recruitment?

- What factors influence the extent of older age bias in recruitment within organisations?

- What promising approaches exist that address older age bias in recruitment?

2.1 Literature review methodology

A rapid evidence review approach was deployed to identify relevant and robust research studies that investigate flexible work management, recruitment bias and age diversity in the workplace. Rapid evidence reviews provide a structured and rigorous search and quality

assessment of evidence but are not as exhaustive as a systematic review. They are useful in providing an overview of evidence in a short period of time and differ from systematic reviews by making concessions to the breadth or depth of the process, for example by constraining the time frame of publications and/or using fewer search strings rather than an extensive search of all possible combinations of terms[3].

The review was conducted in a number of stages as follows:

- Search terms identified, informed by the key research questions (see section 2.6 below).

- Inclusion and exclusion criteria agreed.

- Literature databases searched.

- Searching of grey literature from a range of sources.

- Relevance and quality checks conducted.

- Additional sourcing of relevant literature from key stakeholders.

The following search terms were used to identify literature that discusses the issues of flexible working, recruitment bias and age diversity in the workplace:

Search Terms – age diversity/mixed age teams

- managing generations

- multigenerational & work*

- mixed age teams & work*

- age diversity & work*

- diverse work teams

- older/younger line managers

*(using an asterisk picks up work, workforce and workplace)

Search Terms – flexible working

- flexible work & older workers

- flexible work & business case

- flexible work & sector

- flexible work & ag*ing workforce

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3 For further discussion of the benefits, limitations and approach of rapid evidence assessments see: http://webarchive.nationalarchives.gov.uk/20140402163359/http://www.civilservice.gov.uk/networks/gsr/resources-and-guidance/rapid-evidence-assessment/what-is

- flexible work & age

- managing & ageing workforce

- flexib* & workplace & older

Search Terms – recruitment bias

- age discrimination & workplace

- age discrimination & recruitment

- age discrimination & workforce

- age & hiring

- age diversity

- recruitment & older workers

- age bias & hiring

- age bias & recruitment

- recruitment bias

- unconscious bias & hiring

Inclusion/exclusion criteria

The following inclusion/exclusion criteria were applied:

- English language

- published since 2000 (apart from earlier key influential texts regularly referred to in other studies)

- social sciences (to exclude biological science, environmental, medical etc)

- peer reviewed only (as an initial quality filter) – excludes theses and monographs

- publications based on research evidence – excludes think pieces

- geographical coverage – UK, US and OECD countries

Literature searching

Academic papers were identified primarily through three databases: ASSIA, Web of Science and the International Bibliography of the Social Sciences (IBSS).

In addition, searches were carried out for grey literature, policy and practice documents and other evidence from the websites of a range of organisations and agencies working in the fields of human relations, personnel management, employer/employee relations and

diversity including: Advisory, Conciliation and Arbitration Service (Acas), Age UK, Business in the Community (BITC), the Chartered Institute for Professional Development (CIPD), the Employers Network for Equality and Inclusion (ENEI), Equalities and Human Rights Commission, Eurofund, The Age and Employment Network, Government publications (www.gov.uk/government/publications), and National Bureau of Economic Research. The following company websites were also searched: PwC, Deloitte, EY & McKinsey.

Quality assessment

The academic databases used to identify literature provide a 'peer reviewed only' option. Peer reviewed publications must pass a rigorous process of quality assessment; the literature is therefore filtered at the outset. The final body of literature, including grey literature, was quality checked to determine whether evidence was weak, moderate or strong. In assessing the quality of publications, the review considered:

- sufficient detail provided on methods to assess their quality

- sample size

- methods of data collection

- sampling frame and approach (random probability)

- response rates

- analysis (statistical significance)

- whether sufficient detail is provided on methods used to assess their quality

- ethically rigorous

- clarity in how qualitative participants were selected and recruited

- suitability of qualitative sample in respect of research questions

- details of method and depth of qualitative analysis

- whether appropriate triangulation of methods has been adopted

- clarity of findings presented

The filtering process

Tables 1-3 summarise the process of searching, filtering and quality assessing, highlighting how the volume of publications included in the review was narrowed for each of the topics under investigation.

Table 1: Age diversity

Stage	Sifting	Number of publications
Initial search	Peer reviewed, post 2000 only	2,348
Filter 1 (reading titles)	Removal of out of scope (either not broadly relevant, non-OECD countries or non-human samples)	185
Filter 2 (reading abstracts)	Removal of papers not directly relevant, for example only focused on older workers rather than relations between different age groups or not focused on the workplace	75
Addition of papers published prior to 2000 identified through snowballing	16 papers of theoretical significance or identified through the literature review as relevant added	91
Addition of grey literature	16 papers or reports added	107
Filter 3 (checking quality)	Removal of papers with a low quality score	102

Table 2: Flexible working

Stage	Sifting	Number of publications
Initial search	Peer reviewed, post 2000 only	1,362
Filter 1 (reading titles)	Removal of out of scope (either not broadly relevant, non-OECD countries or non-human samples)	315
Filter 2 (reading abstracts)	Removal of papers not directly relevant, for example, flexible work as a management tool, flexible work around parental leave	118
Addition of papers published prior to 2000 identified through snowballing	15 papers of theoretical significance or identified through the literature review as relevant added	133
Addition of grey literature	10 papers or reports added	143
Filter 3 (checking quality)	Removal of papers with a low quality score	103

Table 3: Recruitment bias

Stage	Sifting	Number of publications
Initial search	Peer reviewed, post 2000 only	3,312
Filter 1 (reading titles)	Removal of out of scope (either not broadly relevant, non-OECD countries or non-human samples)	190
Filter 2 (reading abstracts)	Removal of papers not directly relevant, for example not related to the work context	55
Addition of papers published prior to 2000 identified through snowballing	6 papers of theoretical significance or identified through the literature review as relevant added	61
Addition of grey literature	7 papers or reports added	68
Filter 3 (checking quality)	Removal of papers with a low quality score	66

2.2 Expert and Employer Interviews

Semi-structured qualitative interviews were conducted with 2 groups: 13 interviews with representatives of organisations with expertise around age-friendly workplaces on any of the three issues being researched (Table 4), and six interviews with employers who were involved in best practice and innovation on these same issues (Table 5). Organisations with expertise were identified through a combination of recommendations from Ageing Better and Business in the Community, significant organisations from the literature review, as well as via snowballing from the research. Expert interviews preceded employer interviews to inform knowledge of ongoing innovation and to develop an employer sample that covered a range of types of employers and substantively different innovations. For employer interviews, case study material was collected through and following interviews, for example, around organisational policy, internal research reports, and workforce data. These two sets of interviews enabled us to focus on different aspects of the research questions. While expert interviews provided broader reflection upon how employers were responding to age diversity, flexible work and recruitment bias, identifying common themes and differences in these areas, the employer interviews provided greater insight on the promising approaches being adopted in some sectors and the impacts which these were having upon workplace practice.

Table 4: Expert interviews

Organisation	Expertise	Link to report issues
Local Government Association (LGA)	Managing ageing workforces	Age diversity, flexible work
Behavioural Insights Team (BIT)	Influencing employer behaviour	Flexible work, recruitment bias
Timewise	Overcoming barriers around flexible work	Flexible work
NHS Working Longer Group (2 interviews, from employer and trade union perspective)	Retention of older workers	Flexible work, age diversity
Menopause in the Workplace and Henpecked	Supporting employees and employers in retaining women through menopause	Flexible work, age diversity
Carers' organisation (anonymised)	Retention of older workers with caring responsibility	Flexible work
New Economics Foundation	Working time and job quality	Flexible work
Pearn Kandola	Business and occupational psychology	Recruitment bias
Applied	Innovation around hiring	Recruitment bias
Age Positive	Older worker recruitment	Recruitment bias
Blume Life	Older worker recruitment	Recruitment bias
Recruitment and Employment Federation (REC)	Recruitment through agencies	Recruitment bias

Table 5: Employer Case studies

Employer	Link to report issues	Sector	Case study innovation
Sodexo	Age diversity	Business services	Diversity and inclusion network, focusing on generations
Large retailer (anonymised)	Age diversity	Retail	Forecasting and analysis of employee data
East Cheshire NHS Trust	Flexible work	Health care	Mid-career reflective training
Islington Council	Flexible work	Public sector	Timewise Council
Home Instead Senior Care	Recruitment bias	Social care	Age positive recruitment campaign
Barclays	Recruitment bias	Financial services	Bolder Apprenticeship programme

Ethics approval for the primary research was obtained from the University of Southampton, under application number 27932. Potential interviewees were approached via email, sometimes accompanied by a personal introduction; whereupon the research was introduced both in the email and additionally by a more detailed information sheet concerning the research process, together with a consent form.

Following opt-in, interviewees were offered the choice of a face-to-face or telephone interview (and in one instance a Skype interview), and the interview was arranged at a time that suited them. At the beginning of each interview, the researcher provided a recap of the scope and purpose of the research, how it would be conducted, and checked for understanding, informed consent, and permission to record the interview. Interviewees were offered the option of anonymity and, with two exceptions, all were happy for their organisation to be quoted; the organisations that preferred anonymity were happy to be quoted in a non-attributable way. Notes were taken by the researcher of where in the interview informants had signalled that information was sensitive and off-the-record, to ensure that it did not feature in any reporting, and about half of those interviewed requested being able to sign off quotations before reporting.

Different topic guides were developed for expert and employer research participants (see Appendices 1 and 2), both of which enabled broad questioning on flexible work, recruitment bias and age diversity, and more varied probing and exploration of informants' areas of expertise. All interviews were recorded with a digital recording device, assigned an

anonymised identifier, and transcribed verbatim by a professional transcriber. Interviews lasted between half an hour and an hour, depending on informants' schedules, with employer interviews being longer on average.

A coding framework (Appendix 3) was developed around the topic guides and emerging issues, which was developed throughout the analysis process. This consisted of tree nodes, which were broadly structured around the topic guides, and free nodes which picked up on emerging issues and themes. All transcripts and anonymised case study materials were exported into QSR NVivo 11, where they were coded thematically line-by-line, analysed, and queries ran on NVivo to identify informative patterns or idiosyncrasies.

Findings from the qualitative interviews are integrated into chapters 2, 3 and 4 of this report, where it is triangulated with evidence from the literature to inform discussion of issues.

2.3 Omnibus Survey

To gauge current employer practices relating to age diversity issues, the study used the monthly IFF omnibus survey to run a module of 8 questions[4]. The survey sampled 500 workplaces at the end of October 2017. The sampling frame used is all UK businesses operating in the private and not-for-profit third sector. Business samples are sourced from Dun and Bradstreet, representative of all UK businesses by size, geographical region and industry sector. The final sample was comprised of the following different business sizes:

Sole Traders	64
Micro (1-9 employees)	127
Small (10-49 employees)	150
Medium (50-249 employees)	108
Large (250+ employees)	51

The interviews were conducted with HR managers and business owners/Managing Directors

2.4 Employer Summit

A one-day summit was convened in Manchester, bringing together large employers to deliberate how they can support an increasingly age-diverse workforce and to test early findings from this research project. The Greater Manchester Combined Authority (GMCA) is recognised for its work to create an age-friendly city region. Ageing Better and GMCA have partnered to develop and share innovative approaches to ensuring a good later life.

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4 See: https://www.iffresearch.com/business-spotlight/

The summit, held in November 2017 following the greater part of the research, was run by Ageing Better and brought together large employers from the North West to discuss how to maximise the opportunities of the ageing workforce. It was designed to stimulate discussion and exchange ideas about promising approaches to managing age diversity in the workforce. Over 40 human resources representatives of large public and private sector business participated in the event. They were informed about flexible working and age bias by experts presenting data (including the research team) and practitioners presenting their insights from experience, as well as sharing their own experiences about how employers can manage age diversity in the workplace, overcome age bias in recruitment, and promote flexible working arrangements, both through real-time polling and in small discussion groups. Feedback and discussion from this event helped inform the completion of this research project.

2.5 Roundtables

Two roundtables were hosted in London by Timewise in partnership with Lloyds Banking Group and with the Recruitment and Employment Confederation (REC). A member of the research team presented the emerging findings and the Timewise team facilitated a discussion about the business case for action on age diversity and promising approaches to managing age diversity in the workplace, overcoming age bias in recruitment, and broadening the flexible working offer and improving its accessibility for older workers.

Twenty practitioners attended the Lloyds Banking Group meeting, and 25 members of the recruitment community attended the event hosted by REC. These two-hour meetings of senior HR practitioners and of recruitment experts, agencies, and hiring managers had twin objectives:

- To socialise the emerging findings about 'what works?' and test the relevance of the recommendations to practitioners. This soft testing informed the scope, content, style and tone of an employer-facing publication that communicates the key messages employing organisations could use in a multigenerational people strategy, and the practices and approaches they could adopt to be an age-friendly employer.

- To build a community of interest in receiving the outputs from the project and participating in future action research or industry pilots.

Both roundtable discussions were written up in confidential reports for Ageing Better and shared with participants.

Topic Guide for Expert Interviews

Establish interviewees' remit in relation to workforce issues affecting older workers (OWs).

Flexible Work:

How **important** do you see **flexible working arrangements (FWAs) as being in managing older workers**? Probe: are they being used differently in any way? Across different sectors or occupations? How much are managers adopting age-differentiated managerial practices? Any FWAs better suited to OWs' needs?

Are any types of **FWA less popular** among older workers? Probe on which ones and why. Differences among OWs in terms of FWAs desired/practised?

What might be some of **the difficulties for older workers in asking for/acquiring FWAs**? Probe on differences, how these differ from the rest of the workforce, and potential solutions...

What do you think are the **most influential factors driving FWAs within individual workplaces**? Probe on: manager's attitude, organisational experience with the FWA, employee's role/relationships/ value/policy influence (local or national)/trust/organisational/ industry factors/buy-in to business case. Is this any different for older workers? Probe on characteristics of organisations that are leading on FWAs – any sectoral differences?

Conversely, what kind of **organisational factors make it more difficult to secure FWAs**? Probe on same factors, plus any additional, e.g. promotion structures, lack of training around job design. How is this different for older workers? (get at individual as well as organisational barriers). Probe on characteristics of organisations that are more resistant to FWAs – any sectoral differences?

How might there be **different challenges for older workers around asking for and negotiating FWAs**? Any differences among older workers, e.g. by class, ethnicity, gender, disability, caring responsibility?

What kind of **best practice** are you seeing develop around FW for older workers?: specific initiatives Probe on the characteristics of the best-designed FW policy – is it specific to OWs? Job quality issues? Support to applicants? Managerial training around job design?

How can we best **evaluate the success of individual FWAs/broader workplace policy**? Probe on the metrics, and why these are meaningful.

Recruitment bias:

How much of an issue do you think **older age bias and stereotypes**, conscious or not, are **factors in recruitment**? Probe on why/why not? What leads them to say this? Is it more of an issue in particular sectors or occupations; in terms of different approaches, such as online recruitment, recruitment agencies?

What do you think are the most **effective ways of tackling older age bias around recruitment**? Probe on awareness/engagement with different schemes, perception of value, benefits and challenges to employers in implementing them, best practice and innovation, measuring effectiveness, challenges persuading employers.

What kind of **bias and stereotypes** do you think still exist **among employers in terms of recruiting older workers**? Probe on how these are manifested and get reproduced, whereabouts in the recruitment process (advertising, shortlisting, interviewing), sectors, seniority around this, how they can best be tackled, effects on workforce wellbeing. Probe on both positive and negative forms of bias and stereotypes around older workers.

What kind of effect do you think these kinds of bias and stereotypes have on organisations' hiring processes across the labour market?

What kind of **factors** do you think are **driving older age recruitment bias**? How could these be tackled?

How does recruitment bias affect the way that older jobseekers approach moving jobs? (job search, application, interviews) Probe on differences by age, gender, sexuality, disability, and ethnicity – are some demographics more of a combined disadvantage with age? Strategies that older workers might adopt in response (moderating application behaviour, managing age-impression in application/recruitment). Probe on broader implications of recruitment bias.

Do perceptions of recruitment bias impact on subsequent decisions around training (given opportunity costs and actual costs in terms of time and money)?

What kinds of **policy or good practice** have you seen used to best effect in influencing the extent of older age bias in organisations' recruitment processes? Probe on where, how this is been developed, impacts, framing in terms of broader policy programmes (e.g. diversity policy), characteristics of organisations. How commonplace are diversity policies/diversity representatives? How do you think **good practice** could be **developed** in the most productive way on these issues?

How do recruitment **agencies, online recruitment, organisational recruitment practices compare**? Probe on how this could be improved. Perception of older workers' preferred recruitment channels.

Context dependency of good practice e.g. diversity champions and other approaches which are better suited to large organisation. What kind and sources of support do SMEs need?

Managing age diversity:

What kind of arrangement do you think of when the **term workplace 'team'** is used? e.g.

employees of different ages working together either in formally designated teams, or looser working groups where employees interact fairly regularly.

Are **mixed age workforces/working groups** something that employers are **actively engaged with**/thinking about? Is it a high profile issue?

By contrast, they might think instead of what are the challenges/opportunities in employing older workers (or younger workers), thinking about the age groups separately rather than thinking about inter-relationships?

Are **'generations'** (i.e. baby boomers vs Gen X and Gen Y) widely used as a conceptual frame for employers? So when we talk to employers will they be more engaged with the **language** of 'intergenerational' benefits/tensions, compared with the idea of mixed age teams or age diversity? We want to get the language right.

How widely do employers think about:

- Age bias/discrimination/prejudice among their employees.

- Ideas such as team climate (how well employees work together/support each other vs being in tension or competition).

- Team identity (the extent to which employees think of their working groups in terms of 'we'?

How much **conscious planning** do you see **employers invest in formulating teams**? How much is **age a factor** in this? Probe on in what sense. How much is active age management going on, as opposed to age diversity reflecting the existing workforce profile?

How common is MAT training? Probe on quality, obstacles, and areas for development.

What do you see as being the main **benefits of mixed age teams**? Probe on any differences for workers and managers – and demographic differences. Probe on benefits in terms of team dynamics, productivity and job satisfaction, retention, progression, performance, distribution of skillsets, shared knowledge and learning – sectoral differences?

Any managerial challenges? (line management, mentoring, progression, task assignment, intergenerational communication, divergent socio-cultural attitudes – bring out sectoral differences).

What kind of **labour market differences** do you observe on MATs? Probe on differences in practice and experience between sectors, occupations, size of organisations.

Do you **see any discriminatory practice at the moment**? Overt and covert. Probe on where they're found, explanations for then, and negative effects?

What do you think will be the most **effective ways of tackling these**?

What examples of **good practice** do you see around this issue? How can we learn from these? Any particular drivers? Qualities of the most effective examples of diversity training. Probe on types of employers.

What kind of **approaches** do you think would have **most value** for employers to maximise the benefits of MATs? Probe on management and workforce training and learning, tackling discriminatory attitudes. Effective ways of convincing employers on these issues.

What kind of improvements to workplace practices do you think could be made to support older workers working within mixed age workforces? (organisation leadership, workplace culture and messaging, practice and systems, line management, colleague behaviour).

Broader questions:

What can we learn from workplace behaviour and practice around age in terms of other characteristics, such as gender and race?

Appendix 2: Topic Guide for Employer Interviews

Collect background material on **organisational background**: size, types of work in workplace, occupational distribution, demographic factors, sites, managerial profile/style, HR context, unionisation, key staffing issues, skill shortages.

Collect data on/probe around **policy**: Equal opportunities policies, diversity policy (is there an organisational diversity rep?), age-specific policy, appraisal system, flexible working policy (any tailoring around older workers?), recruitment policy, managerial training systems, flagship policies and innovation.

Training: is training provided on working in teams; diversity awareness and behaviour; managerial training (job design, managing FWAs, leadership skills, remote working)? (nature of the training and how often?)

Date collection and monitoring: age profile of workforce; formal requests for flexible working, promotions by age.

Workforce: do you conduct staff satisfaction surveys, exit interviews/surveys; what kind of opportunities are there for workforce networking?

What proportion of your workforce are over the age of 50? (what we'll refer to in this interview as 'older workers') Probes: are they in particular roles/seniority?

Flexible working:

Context: types of flexible work available in the organisation: homeworking, compressed hours, flexitime, annualised hours, job-share, term-time working, paid sabbaticals (not exhaustive).

What does **flexible working mean** in this organisation? Probe around age, positive/negative aspects of FW for employers.

How common are flexible working arrangements among the older workers in your workforce? Probe: on types of FWAs, formality of arrangements, triggers, typical changes that are made, occupational/role/sectoral differences. Probe around any noted change over the past 10 years and since legislative change in 2014. Any differences between OWs and broader workforce in terms of FWAs? (try and get at what's available, or managers have experience of, in the workplace as well as what's used). Differences between OWs in terms of FWAs, e.g. by gender. How prevalent are FWAs compared to 9-5 arrangements?

Are any types of **FWAs less popular among older workers**? Probe on which ones and why? Are these used elsewhere in the workforce? What kind of potential/difficulties do these pose for OWs' working arrangements? Probe on organisational differences to implement.

Have you found that any types of FWA are **better suited to the needs of older workers**? Probe on why, if there are able to measure this in any way. (Do they routinely monitor requests?)

How much change have you seen in FW requests since the change in legislation?

How did FW policy evolve and what are its main features? (probe around job quality issues; the process by which an older worker would seek FWAs)

Have you developed any **new initiatives** in your organisation around FW? Probe on what drove this, influencing, uptake, measuring success.

Within this organisation, what do you consider to be **the important influences of the implementation of FWAs**? Probe on: manager's attitude/organisational experience with the FWA/ organisational champions/employee's role/relationships/value, policy influence (local or national) – and probe on managers' awareness/trust/organisational/industry factors. Is this any different for older workers? Do you think the influences would be different in other organisations? (compare to previous experiences, industry comparators). Probe about specific actions in workplaces that have a double benefit: i.e. improving employee access to flexibility and improving productivity/ retention/engagement of older workers.

Do any **factors make it more difficult for employees to work flexibly**? Probe on same factors, plus any additional, e.g. promotion structures... Is this different in any way for older workers? - try and get at individual barriers too.

How might the **challenges be different for older workers around asking for and negotiating FWAs**? Any differences among older workers, e.g. by class, ethnicity, gender, disability, caring responsibility?

What kind of **reasons** would most commonly be **given for refusing a FW request**? Probe in relation to the 'business grounds' cited in the legislation.

What are the most important **factors in decision-making** around FW requests? Probe on attitudes of individual managers, relationships with/value assigned to applicants/sympathy with applicant's situation/precedent/type of application/ legislative framework. Probe on what's behind pockets of managerial resistance to FWAs. Did managers receive any training on the RtT system?

What are line managers' and the HR department's responsibilities around FW protocol and its implementation?

What are main **benefits** that you experience **from offering flexible working to your older workforce**? Probe around the business case benefits, skills transfer, & how these are different for OWs.

How do you make an **assessment of how successful a FWA is**? Probe on increased engagement, sustainability of arrangement, higher retention, lower recruitment costs (what indicators of business performance matter most?). Do any particular types of FW appear to be more stable/successful than others? Why do you think this is?

What are some of the **challenges** of offering these working practices, and how have you responded to these? Probe on inexperience, job design, instability of FWAs, cost implications.

How do you think we should be evaluating or learning from the different ways in which FWAs are offered to older workers?

Are you taking any **specific approaches to FW in terms of older workers**? E.g. campaigns targeted at 50+, innovation around FW contracts, information guides, retirement seminars. Probe on the background to these and what they involve. What kinds of impacts are they having? Benefits and challenges in getting involved. Areas for refinement?

Recruitment bias

Context: what is the **usual recruitment process** in this organisation, has this changed in recent years, is it any different for different positions, what kind of recruitment challenges are there? Probe around advertising/recruitment, shortlisting, interviewing. Use of recruitment agencies, online recruitment, traditional advertising, and perceptions of patterns of responses in terms of age.

How much **impact** do you think the **age of an applicant has on the recruitment process**?

Do you **track the age profile of (a) applicants (b) candidates (c) successful appointments**? What do you notice about the age profile at each stage in the recruitment process?

At the **recruitment level**, would you say that **older age bias and stereotypes** – be they conscious or less apparent – are an issue in this organisation? Probe around why/why not? In what ways are they manifested? What's driving them? Is it more of an issue in particular departments/particular mangers/for particular jobs? How this might have changed over time.

Are any jobs advertised as flexible at the outset?

What kind of bias and stereotypes have you seen around recruiting older workers during your career? Probe who these were coming from, what's driving them (inexperience, ignorance), perceptions on how they can be tackled, effect on organisations over the longer-term, whereabouts in the recruitment process they occur (advertising, shortlisting, interviewing), changes over time. Probe on both positive and negative bias/stereotypes.

Do you see **fewer older workers applying/interviewing for jobs than you might expect**? Probe around why, whether particular groups are underrepresented among older applicants (gender?), strategies older workers might adopt in response, effects in different sectors. Is this an issue that is ever raised by your older workforce? What's driving it?

Does this organisation have any **policies or initiatives aimed at raising awareness around and tackling age bias**? Detail on these – what they involve, what's driving them. What do you think of these? Have you taken part in them? What kinds of impacts do they have? What are the benefits for employers in tackling these issues/adopting good practice? Challenging in implementing them? How could they be improved?

Managing age diversity/mixed age teams

What kind of arrangement do you think of when the **term workplace 'team'** is used?

Context: In this organisation, how much do employees of different ages work together in formally designated teams, or in looser working groups where employees interactive fairly regularly?

How are **teams put together** in here? Probe on level of conscious planning, refinement or evolution over time, what are considered to be important factors (any organisational theory), who makes the decisions about team-building/development?

What **role**, if any, does **age play in team formulation**? Probe on any formal policy on managing age diversity within teams, how much they see this as active age management, or the natural/existing workplace profile. Probe on different approaches they've tried, and what works best & why – changes that have been seen using different methods around MATs.

Are mixed age workforces/working groups something you are **actively engaged with**/thinking about? Is it a high profile issue?

How much do **line managers/HR in your workplace think about** (and how does this come out?):

- age bias/discrimination/prejudice among their employees

- ideas such as team climate (how well employees work together/support each other vs being in tension or competition)

- team identity (the extent to which employees think of their working groups in terms of 'we'?

Do you think about the **needs of different age groups** in this organisation? Probe on how this manifests itself into practice. Do they think about age on a continuum, or in terms of generations; are these distinctions useful in management? Or more broadly in terms of inter-relationships. Probe on broader attitudes to MATs across the organisation – any discriminatory views? Any sense in which issues around age diversity are organisationally-specific?

Do you ever draw on the **popular management literature** dividing workers into distinctive **generations**, such as Millennials, Generation X, baby boomers, etc.? Probe on relative utility of this, examples of where they've used it in practice, where it's unhelpful. Any other places they obtain information about MAT management from.

Probe on formalised MAT training across the organisation – availability, who it would be offered to, how it's been developed, satisfaction with it, areas for improvement.

What do you see as **the main benefits of mixed age teams**? Probe on team dynamics, productivity and job satisfaction, retention, progression, performance, distribution of skillsets, shared knowledge and learning.

Any challenges? Probe on managerial challenges (line management, mentoring, progression, task assignment, intergenerational communication, divergent socio-cultural attitudes), examples and how they dealt with these, and would do in the future, any ways in which it's changed their perceptions.

Are there any formal or informal **mechanisms for evaluating employees' satisfaction**, and the success of MATs? Probe on differences by gender, ethnicity, and occupation.

Does this organisation have any **policies or initiatives around mixed age teams**? Detail on these – what they involve, what's driving them. What do you think of these? Have you taken part in them? What kinds of impacts do they have? What are the benefits for employers for this kind of innovation? Challenging in implementing them? How could they be improved?

What kind of improvements to workplace practices do you think would be most helpful to support older workers working within mixed age workforces? (organisation leadership, workplace culture and messaging, practice and systems, line management, colleague behaviour)

Broader questions:

What can we learn from workplace behaviour and practice around age in terms of other characteristics, such as gender and race?

Appendix 3: Coding framework for transcripts on NVivo

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Mixed aged teams (MAT)

Definitional issues around team
- Generations vs age diversity vs MAT

Intergenerational issues

Employers' engagement with MAT

Conscious team formulation
- Policy and practice around age
- Industry factors

Benefits
- For workers
- For employers

Challenges

Labour market differences

Evaluating MAT success

Discriminatory practice

Best practice

Recruitment bias

Usual recruitment process

Recruitment agencies|

Prevalence of older applicants

Impact of age bias and stereotypes
- Sectoral issues
- Specific bias and stereotypes
- Implicit bias and stereotypes
- Drivers

Approaches for tackling age bias

Language issues

Impact on older workers' labour market behaviour

Best practice

Flexible work

Definitional issues around FWAs and organisations

Flexible by default

Prevalence of FWAs

        - Match with older workers' needs

        - Refusing requests and decision making

        - Evaluating success

Managing older workers

        - Sectoral differences

        - Fit with older workers' needs

        - Different FWAs

Workplace drivers of FWAs

Obstacles/challenges to FWAs

Benefits of FWAs

Best practice

Business case

Changing needs of older workers

Data collection and monitoring

Definitional issues around older workers

Employer engagement with Age-Friendly Workplaces

Extended working lives

Learning from established workplace practice

Retention

Skills deficit