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Managerial perceptions of supporting training and development of older workers in the context of extending working lives

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Context

- Government policies towards older workers generally seek to *extend* working life
- Lack of measures that address the factors that 'push' older workers out (work pressure, skills deficit)
- Recognition that line managers play an increasingly important role in HRM, including older workers
- Little research has focused on line managers



Change in approaches to age management

- Mandatory retirement ages minimised role of HR and line managers
- Early retirement schemes could by-pass line managers
- Without DRA and the emergence culture of extending working, the potential influence of line managers is much greater



Impact of line managers retirement on retirement

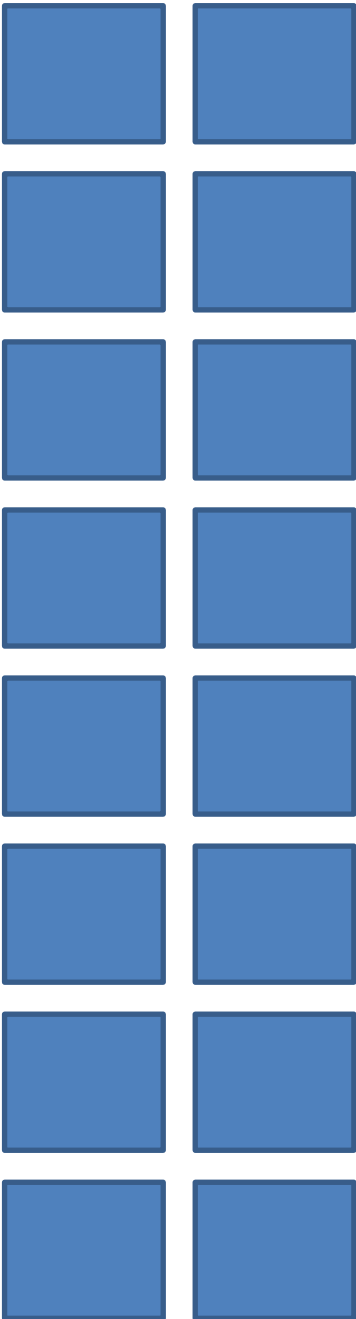
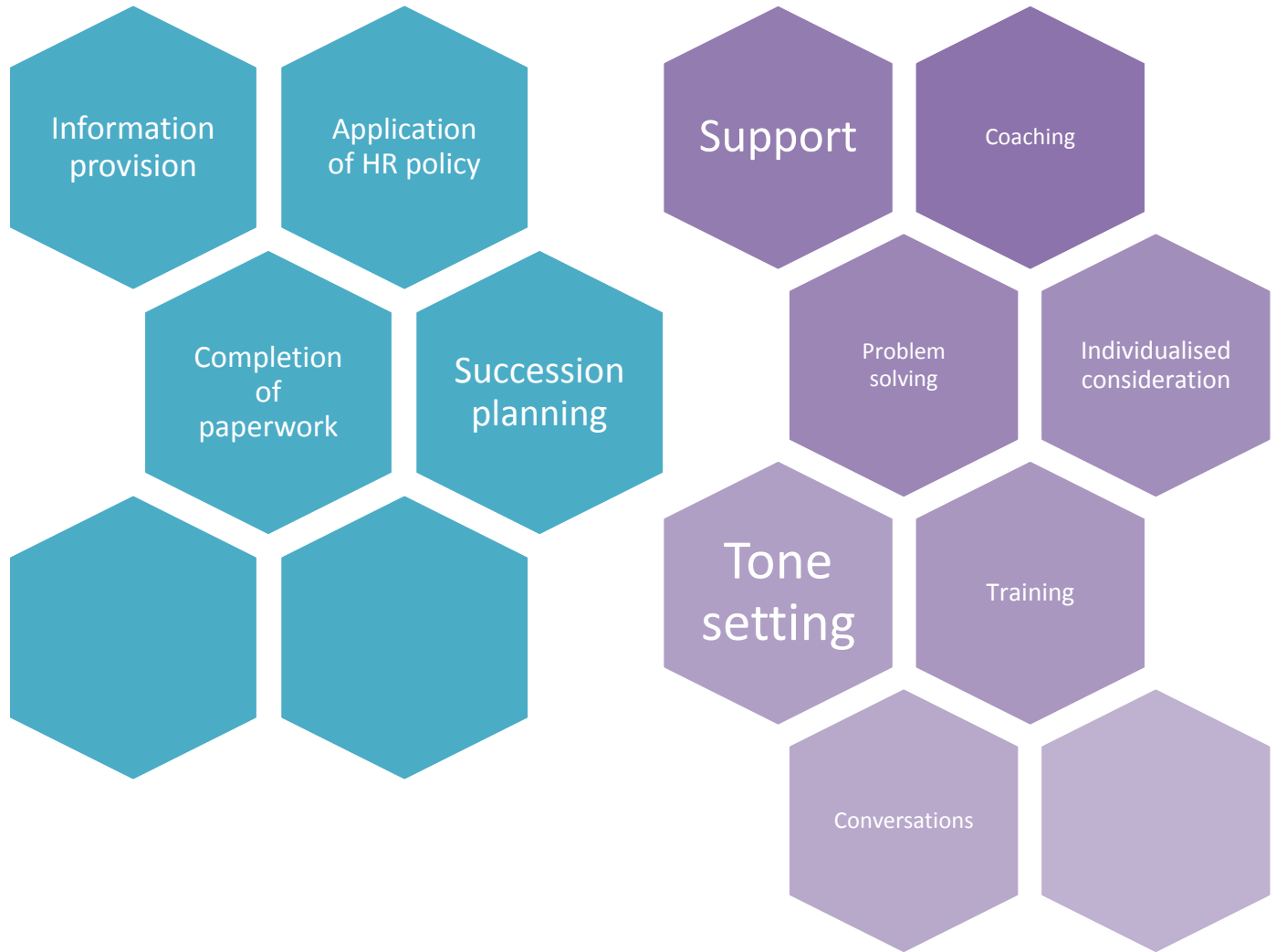
Timing of retirement

Work climate

Availability of alternative working patterns

Support, motivation and encouragement of staff (Henkens and van Dalen, 2011)

What is retirement management?





Key questions

- How do line managers perceive their role?
- Do they wish to become involved in retirement decisions?
- What discretion space do they perceive within the organisation?
- What support /training do they receive?
- Are they competent in these areas?



Study

- Academic line managers (N=129) from UK universities (73% male, 27% female)
- Vignettes (Hypothetical scenarios of older workers). Each LM responded to 8 vignettes
- Survey based question about experiences
 - Perceived role in retirement decisions
 - Age expectations
 - Discretion space
 - Training / support

Whose responsibility?

Line manager	Human resources	Both	Neither	
				Older workforce friendly environment
24.0%	3.1%	72.1%	0.8%	Maintain equity and fairness between staff members ensuring that there is not more favourable treatment of an employee because of their age
42.6%	9.3%	46.5%	1.6%	Allow flexible working options around retirement (i.e., part-time or reduced hours, working from home)
38.0%	3.9%	52.7%	5.4%	Encourage older workers to take up training / development opportunities
20.9%	8.5%	69.0%	1.6%	Ensure older workers are aware of the training opportunities that are relevant to them
14.7%	14.7%	59.7%	10.9%	Challenge stereotypes about older workers
18.6%	17.1%	55.8%	8.5%	Reduce the potential cultural barriers to flexible retirement (e.g., lack of awareness amongst other employees, attitudes and beliefs of colleagues)
30.2%	9.3%	38.8%	21.7%	Take proactive steps to engage and retain older workers
22.5%	25.6%	48.8%	3.1%	Review health and safety policies and promote sensible working practices for older workers
28.7%	24.0%	34.1%	13.2%	Carry out health and safety workplace assessments and take account of the needs of older workers
				Work performance
94.6%	0.0%	3.9%	1.6%	Have regular conversations with all employees about your expectations of them and their work performance
48.1%	5.4%	44.2%	2.3%	Use performance management systems to manage any under-performance
				Workforce planning
32.6%	9.3%	55.0%	3.1%	Monitor who is leaving your department and why
83.0%	0.0%	16.3%	0.8%	Prepare succession plans
86.8%	0.0%	11.6%	1.6%	Plan the transfer of key knowledge, skills and experience back into your department
20.2%	12.4%	4.9%	32.6%	Determine when employees are likely to retire

Is this a legitimate function of management?

Whose responsibility?

Line manager	Human resources	Both	Neither	
44.2%	10.9%	37.2%	7.8%	Individual communication and support
25.6%	10.1%	58.9%	5.4%	Encourage employees to discuss their options for working on and for retirement
21.7%	17.8%	55.8%	4.7%	Accommodate an older worker's individual circumstances (e.g. financial, health and skills) through personalised working arrangements
17.8%	21.7%	56.6%	3.9%	Explore with an older worker any potential barriers to taking up flexible retirement (e.g., fears over loss of status, concerns about financial implications)
92.2%	0.0%	4.7%	3.1%	Offer older workers support in their choices around the timing of their retirement
				Information provision
9.3%	55.0%	33.3%	2.3%	Initiate discussions with employees about where they see themselves in the next few years
9.3%	26.4%	59.7%	4.7%	Provide, or direct employees to sources of information and advice on retirement options/extending working life
				Inform older workers of the availability of flexible working or retirement arrangements (e.g., part-time or reduced hours)

Line managers do not see themselves as information providers

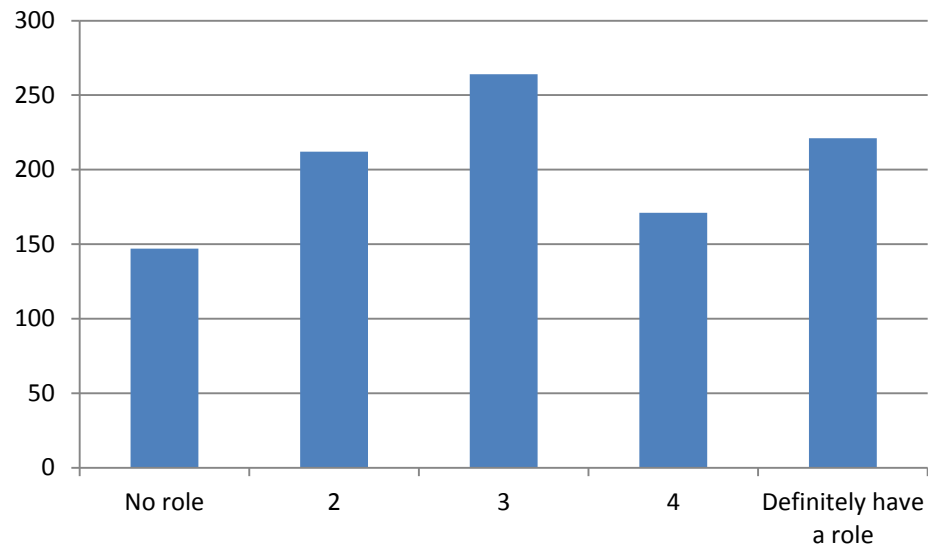
Self efficacy

Line manager	Human resources	Both	Neither		Self efficacy	
					M (1-5)	SD
Older workforce friendly environment						
24.0%	3.1%	72.1%	0.8%	Maintain equity and fairness between staff members ensuring that there is not more favourable treatment of an employee because of their age	3.84	.84
42.6%	9.3%	46.5%	1.6%	Allow flexible working options around retirement (i.e., part-time or reduced hours, working from home)	3.56	.10
38.0%	3.9%	52.7%	5.4%	Encourage older workers to take up training / development opportunities	3.47	.88
20.9%	8.5%	69.0%	1.6%	Ensure older workers are aware of the training opportunities that are relevant to them	3.40	.91
14.7%	14.7%	59.7%	10.9%	Challenge stereotypes about older workers	3.36	1.13
18.6%	17.1%	55.8%	8.5%	Reduce the potential cultural barriers to flexible retirement (e.g., lack of awareness amongst other employees, attitudes and beliefs of colleagues)	3.10	.96
30.2%	9.3%	38.8%	21.7%	Take proactive steps to engage and retain older workers	3.16	1.17
22.5%	25.6%	48.8%	3.1%	Review health and safety policies and promote sensible working practices for older workers	3.09	1.09
28.7%	24.0%	34.1%	13.2%	Carry out health and safety workplace assessments and take account of the needs of older workers	2.98	1.87
Work performance						
94.6%	0.0%	3.9%	1.6%	Have regular conversations with all employees about your expectations of them and their work performance	4.13	.75
48.1%	5.4%	44.2%	2.3%	Use performance management systems to manage any under-performance	3.60	.91
Workforce planning						
32.6%	9.3%	55.0%	3.1%	Monitor who is leaving your department and why	3.89	.83
83.0%	0.0%	16.3%	0.8%	Prepare succession plans	3.87	.82
86.8%	0.0%	11.6%	1.6%	Plan the transfer of key knowledge, skills and experience back into your department	3.76	.86
20.2%	12.4%	4.9%	32.6%	Determine when employees are likely to retire	3.11	1.18

Self efficacy

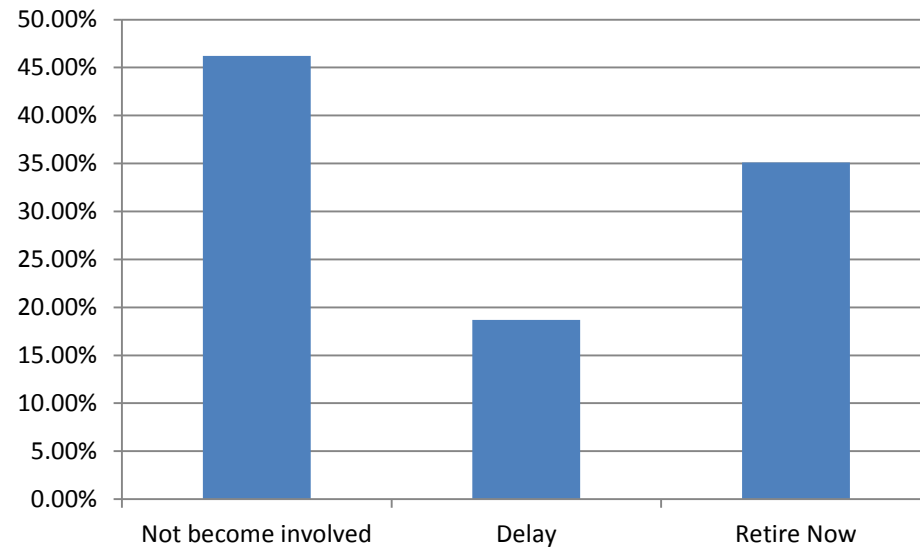
Line manager	Human resources	Both	Neither		Self efficacy	
					M	SD
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44.2%	10.9%	37.2%	7.8%	Encourage employees to discuss their options for working on and for retirement	3.49	1.08
25.6%	10.1%	58.9%	5.4%	Accommodate an older worker's individual circumstances (e.g. financial, health and skills) through personalised working arrangements	3.34	.10
21.7%	17.8%	55.8%	4.7%	Explore with an older worker any potential barriers to taking up flexible retirement (e.g., fears over loss of status, concerns about financial implications)	3.29	1.03
17.8%	21.7%	56.6%	3.9%	Offer older workers support in their choices around the timing of their retirement		
92.2%	0.0%	4.7%	3.1%	Initiate discussions with employees about where they see themselves in the next few years		
Information provision						
9.3%	55.0%	33.3%	2.3%	Provide, or direct employees to sources of information and advice on retirement options/extending working life	2.75	1.06
9.3%	26.4%	59.7%	4.7%	Inform older workers of the availability of flexible working or retirement arrangements (e.g., part-time or reduced hours)	3.19	1.08

Line managers have mixed views about their role in the timing of employee retirement



N=1029 vignettes

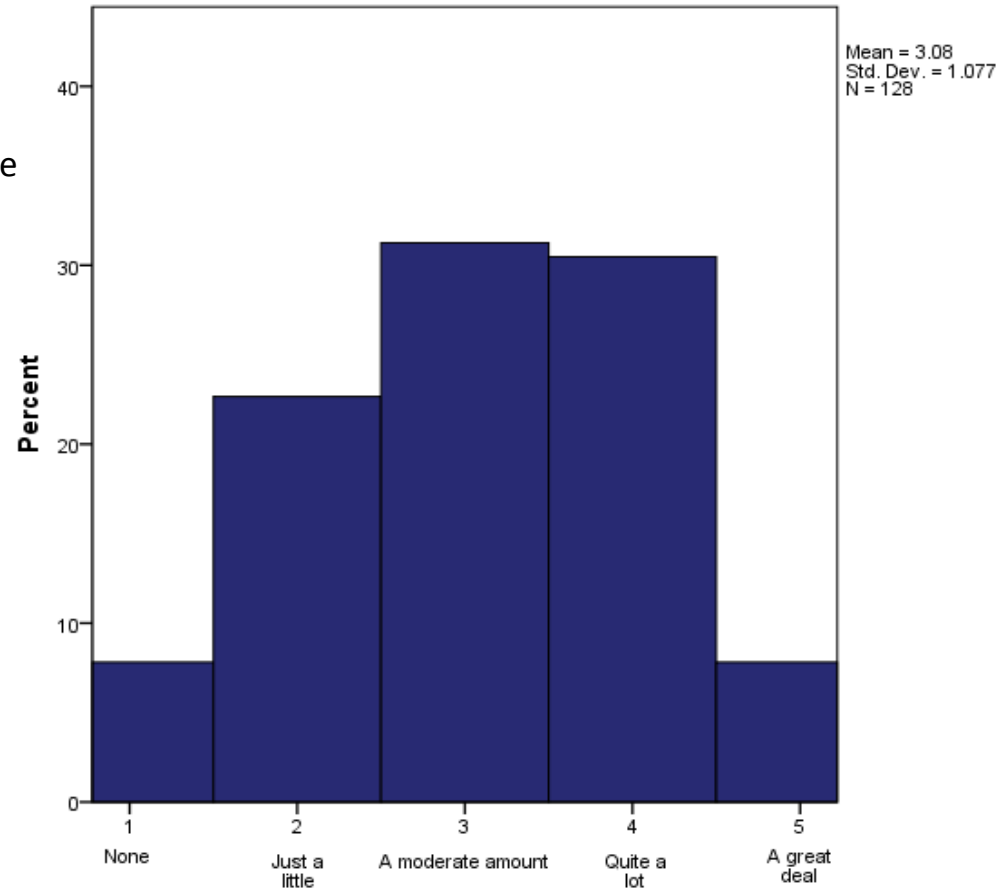
Greater preference to encourage earlier retirement rather than later



N=1029 vignettes

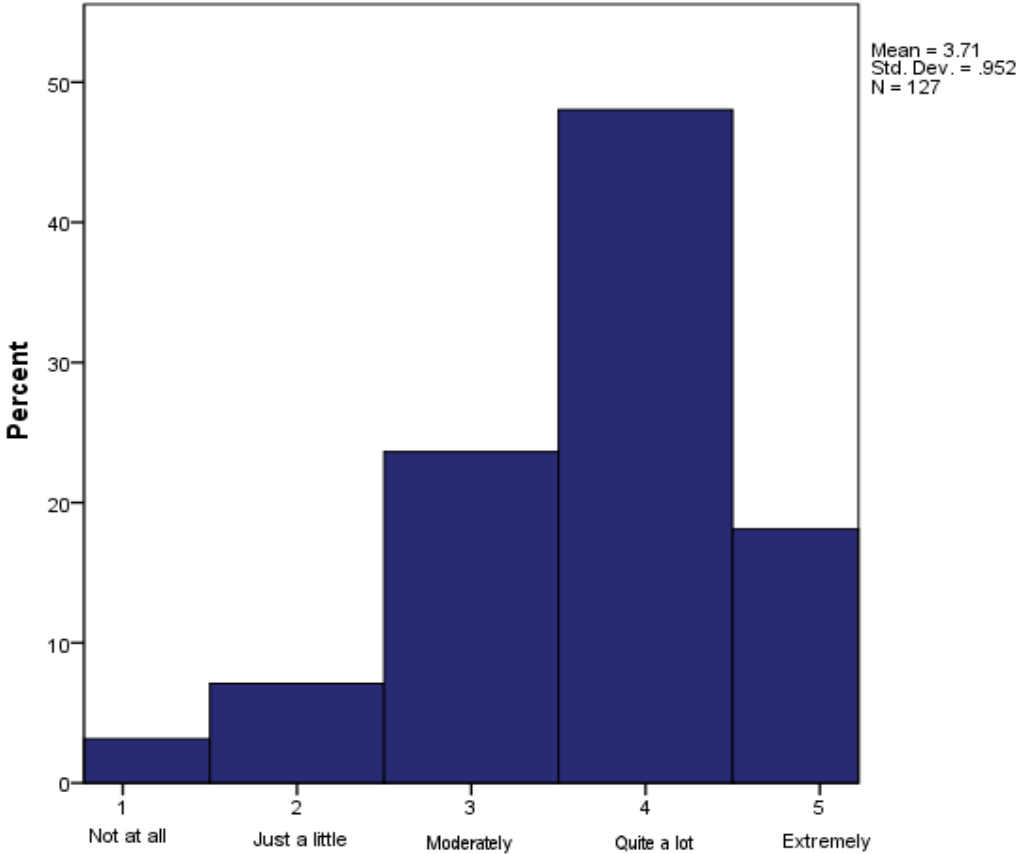
Line managers perceive relatively high levels of discretion ...

How much **discretion** do you have over the way you manage the retirement process of your older workers?



...and feel supported in their role

To what extent would your line manager support your decision-making over retirement timing and providing flexible working arrangements?



They have little training

Item	M (SD)
Operate/manage without a fixed retirement age	1.80 (0.92)
Organisational policies relating to managing retirement	1.80 (0.92)
Implications of the abolition of the default retirement age on HR practices (e.g., discrimination, performance management and succession planning)	1.93 (1.00)

	N	Percent
Via the staff handbook	26	20.2
Management training	49	38.0
Staff Intranet	49	38.0
Communication from Human Resources	101	78.3
Via your line manager	31	24.0
During induction	7	5.4
In recruitment interviews	0	0.0
In your employee contract	0	0.0
In recruitment advertising	0	0.0
None of the above	21	16.3



Age norms

- Age norms
 - 'Too old': mean age: 72.09 (SD 4.85)
 - 'Too young' to retire: mean 53 years (SD 8.57)



Conclusions

- No evident consensus about the role of line managers
- Line managers do perceive that they have a role to play, and do have discretionary space and support
- Implications for individuals: people may need to be proactive in seeking organisational support