

Older workers (1933)

~~Mari Frankel~~ ✓

# THE OLDER EMPLOYEE IN INDUSTRY

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INDUSTRIAL RELATIONS

# THE OLDER EMPLOYEE IN INDUSTRY



POLICYHOLDERS SERVICE BUREAU  
Group Insurance Division  
METROPOLITAN LIFE  
INSURANCE COMPANY  
HOME OFFICE—NEW YORK  
Pacific Coast Head Office—San Francisco  
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1933

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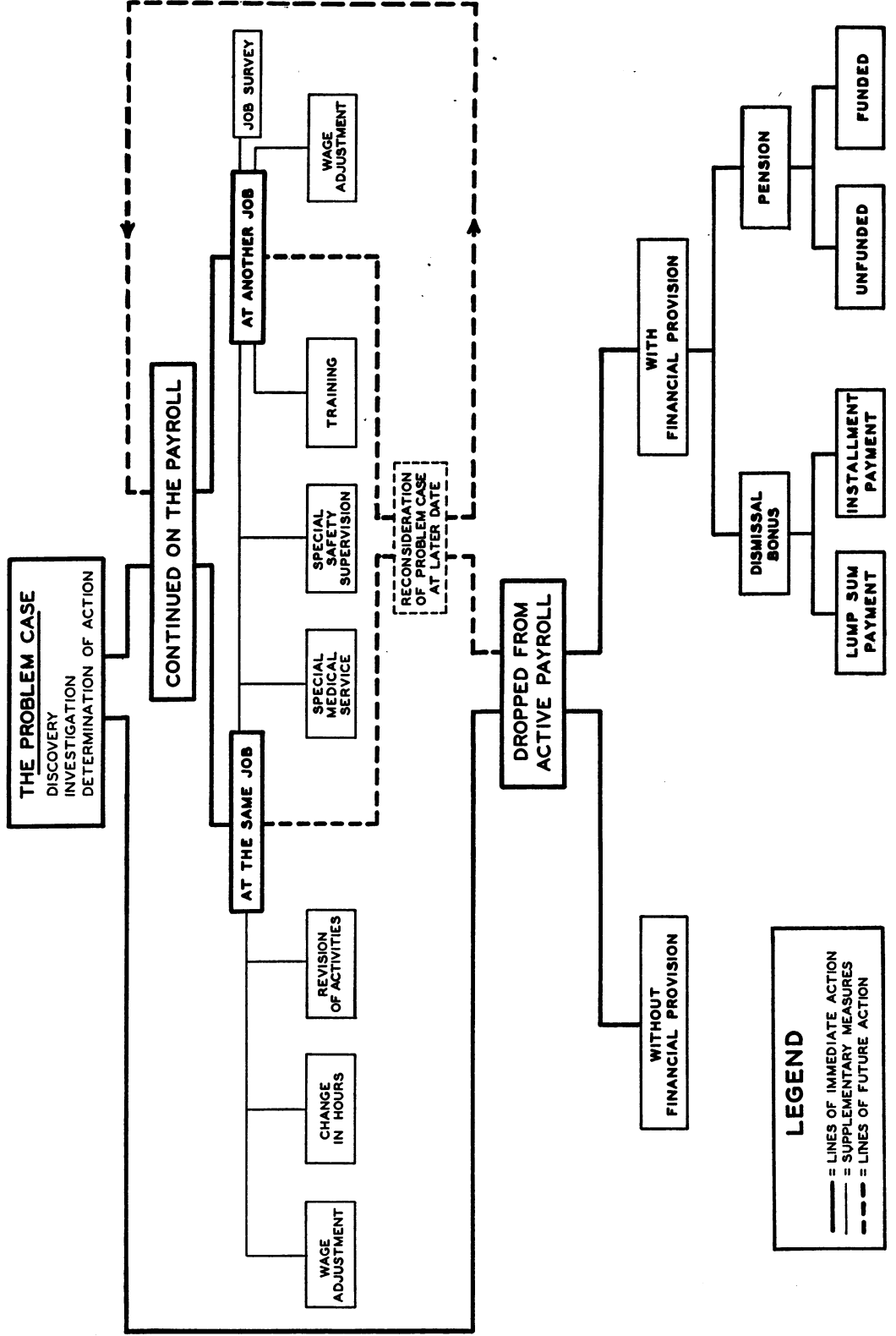
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# THE OLDER EMPLOYEE IN INDUSTRY

## CHART OF ALTERNATIVE PROCEDURES





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# THE OLDER EMPLOYEE IN INDUSTRY

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## INTRODUCTION

**F**EW PHASES of employer-employee relations have been receiving greater attention in recent years than the question of what to do with workers whose usefulness at their customary occupations has declined because of age. Most organizations recognize that many of these individuals, if continued at their regular jobs, represent "hidden costs" and, therefore, are a challenge to good management. However, there is hesitancy to resort to drastic action in the case of veteran employees, since there is a growing feeling that employers have an obligation to them.

Considered in terms of future economic value, such employees may be classified in two groups. First, there are the so-called "older" employees—those who can be retained profitably if adjustments in duties or conditions of work are made. In contrast to these are the individuals who have become permanent liabilities and who are usually regarded as "superannuated." In these definitions, it is assumed that there is no fixed age in life at which a person becomes an economically older or superannuated employee. It is entirely a matter of his economic value to the company.

Current methods of dealing with older and

superannuated workers differ considerably. In the case of *older* employees, the tendency is to resort to temporary measures designed to extend the number of years during which these workers are employable. *Superannuated* employees usually are dealt with through retirement or dismissal. It is the purpose of this report to present typical measures which American industry has introduced to prolong the period of employment of older employees, no mention being made of the measures which have been applied for the benefit of those who are unemployed.

Because little information on the employment adjustment of older persons in industry was available, the Policyholders Service Bureau, as a first step in this study, sent a questionnaire to 5,000 manufacturing companies. The inquiry was designed to ascertain what provisions these organizations had made, or were making, with regard to older employees. Of the companies that replied, about 800, employing nearly a million workers, indicated that they were attempting to arrive at some solution to the problem. A further inquiry into the practices of these companies was made through visits and detailed questionnaires.

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TO THE COMPANIES and individuals who have contributed data and given constructive suggestions in the preparation of this report, the Policyholders Service Bureau wishes to express its appreciation. Particular acknowledgment is due the following men who reviewed and commented upon the discussion presented in this publication:

SOLOMON BARKIN, *Investigator*, New York State Commission on Old Age Security; EDWARD S. COWDRICK; R. SMITH PAYNE, *Director of Engineering and Industrial Relations*, Cluett, Peabody & Company, Incorporated; H. F. SEDWICK, *Manager, Industrial Relations Division*, E. I. DuPont DeNemours & Company.

## I. ORIGIN AND REVIEW OF PROBLEM CASES

INDUSTRIAL executives cooperating in this survey reported that their efforts to solve the older-employee problem usually have consisted of action taken to meet each separate situation. Formal rules or fixed procedures in dealing with problem cases are infrequent.

### Factors Affecting the Number of Problem Cases

THERE ARE several factors which have been found to increase or decrease the number of problem cases in individual companies, such as:

1. Age of the organization
2. Proportion of short-service and long-service employees
3. Previous mergers
4. Changes in production methods
5. Labor policies

In young organizations, the average age of employees usually is below the average of gainfully occupied workers in industry as a whole. Conversely, a large proportion of employees with long service is commonly found in older companies. Many firms cited as the reason for the absence of the older-employee problem the fact that the company had been in existence only a short time.

Temporary employees, under normal conditions, are not with a company long enough to develop into problem cases. Similarly, according to many of the executives reporting in this survey, there exists no logical responsibility for retaining permanent workers who have not been in service long enough to have made a substantial contribution to the success of the organization. For this reason, before giving special attention to older employees, companies frequently require a minimum length of service which varies from six months to twenty-five years—ten years commonly being specified.

When a merger occurs, the ensuing reorganization often necessitates many employment adjust-

ments and creates problem cases. In other instances, it brings problem cases to light. A metal-working establishment, for example, mentioned that, due to taking over several older companies, the problem of many older employees now exists.

Not only reorganizations, but new inventions and changes in production methods have sometimes added to the older-employee problem. A manufacturer of office furniture and equipment reported that the introduction of automatic conveyors eliminated many jobs and necessitated a considerable number of transfers. The older employees found it difficult to adjust themselves to the changed conditions, and special attention was required in many cases.

Another factor aggravating the older-employee problem is lack of foresight on the part of some foremen and consequent neglect of preventive action. For example, a machinery manufacturer attributed many problem cases to the presence of certain particularly inefficient men who should not have been retained by the company after their lack of ability became known. It was stated that one man had been employed over twenty-five years, in spite of the fact that for fifteen years he has not been worth his wages. The company recently adopted the policy of reviewing the record of every man upon the completion of a fixed period of service in order to determine what action should be taken.

The hiring policy of a company sometimes affects the number of problem cases which later develop. A small meat-packing company located near large establishments of the same type, for example, reported that it employs men who are no longer fit for duties in the larger plants. This is possible because work in the smaller company is lighter. After ten or fifteen years of service, however, it has been found that men hired from these sources cannot continue to do the work

originally assigned, and, therefore, problems of employment readjustment arise.

### Discovery of Problem Cases

IN ESTABLISHMENTS where individual efficiency can be measured with reasonable accuracy—through production records, for example—it is unlikely that problem cases will remain long undiscovered. For example, when an employee produces less than formerly, earns less, spoils more work, or loses more time from sickness or accidents, his immediate supervisor usually realizes that something is wrong. In other instances, an employee's decline in usefulness, particularly in its early stages, is not realized by management. This employee, as the value of his services declines although the amount of his wages is unchanged, becomes a "hidden pension cost" on the company's payroll.

#### *Casual Discovery Through Observation*

Generally, the foreman or superintendent is the first to discover problem cases. A manufacturer of office furniture and equipment, for example, stated that usually the first indication of a problem case is a falling-off in the employee's production record, which the foreman should immediately notice. In small organizations where there is close contact between management and employees, higher officers sometimes are the first to recognize problem cases. A company in the textile industry employing some 200 persons, reported that, by the time an employee reaches an age of decreasing usefulness, the management is reasonably well acquainted with him and his needs. This company also stated that, in some instances, the employee himself may be the one to bring his case to the attention of an executive.

In a company that has certain functionalized service departments, the heads of these departments often aid the line management in discovering older employees who require attention. A

manufacturer of rubber products, for example, stated that problem cases may be brought to light by the medical department, labor department, and engineering department, as well as by foremen, or employees themselves.

#### *Discovery Through Medical Examinations*

In both the discovery and treatment of problem cases, medical examinations were stated to be an important factor. Many companies provide for such examinations at the time of hiring, but reported that only physical tests conducted after employment are of assistance in dealing with problem cases. A metal manufacturing company, for example, examines employees annually and thus brings to light cases needing special attention. Another company requires an annual physical examination of all employees past 45 years of age. It is believed by the management that, if the impairments of age are brought to light at an early stage, efforts at rehabilitation have a greater chance of success.

A company in the abrasive industry locates problem cases through its follow-up medical examinations. It is stated that the management considers employees as problem cases from the standpoint of disability rather than age. At the time of hiring, each employee is examined. The physician, taking into consideration the physical condition of the applicant and the health hazards of the job to which the employee is to be assigned, sets a date for follow-up of each case. Furthermore, every employee who has been ill must be re-examined before returning to active duty; and, similarly, after this examination is completed, a follow-up date is assigned. Through this procedure, those most likely to become problem cases are the ones examined most frequently, and the employment department is notified whenever the doctor believes a change in occupation is necessary. This procedure also serves as a check upon the supervisors, who are expected to report special cases requiring attention.



### ***Discovery by Review of Employees' Records***

The industrial relations, medical, or production departments (the choice depending upon the plant organization set-up) of some companies make systematic reviews of employees' records. These include records of production, attendance, sickness, accidents, earnings, and service ratings. For example, the industrial relations department of a company manufacturing a small precision product develops, on the basis of its annual rating of employees, a file of problem cases. The annual rating evaluates the quantity and quality of work as poor, good, or excellent. A manufacturer of stationery reported that the company's standard hour plan of wage payment automatically rates the employees. All who are rated low are investigated by the foreman and personnel department.

Sometimes a review of employees and their records is made by having each foreman list his inefficient employees, with a brief statement regarding each. For example, these facts provided information for a problem case file maintained by the industrial relations department of a company manufacturing electrical products. It is the intention of that company to continue the collection of such data in the future as frequently as is deemed advisable.

In a company having a number of branches, a representative of the central industrial relations department was given the task of determining how many older employees were assigned to jobs in which they no longer were efficient. The interest of plant managers was aroused through informal discussions of methods of improving operating efficiency. Then, with the full support and approval of each plant manager, department heads were interviewed. It was discovered that many cases required attention. A list of these older employees was compiled and consideration was given to data that appeared on medical, safety,

and production records, as well as to the opinions of department heads.

An iron foundry stated that it plans to go over the payroll annually, noting the length of service of every man. Particular consideration will be given those with more than ten years' service, keeping in mind their probable value to the company.

Still another method of uncovering problem cases as yet untried in practice but reported to be under serious consideration by one company is this: A major executive will review each employee's record and interview him when the employee becomes 45 years of age and after every succeeding five years of service. It is believed by executives of this company that a periodic review of older employees is likely to disclose their shortcomings, their needs and the type of treatment required. In Figure 1, there is reproduced a form which was intended to aid the executive conducting the interviews. It contains a summary of the employee's service from the standpoint of the supervisor and of the personnel department. Space is provided for noting the employee's views regarding his future and for the comments of the interviewer.

### **Disposition of Problem Cases**

BEFORE a workable plan for each individual can be agreed upon, most companies find it advisable to consult those in the organization most likely to be of assistance. In almost all the companies conducting medical work, the plant doctor is consulted. If there is a safety director, he, also, is generally asked to contribute his advice. If a transfer is under consideration, the foreman of the department to which the transfer may be made is likely to participate. In other words, although there is no hard-and-fast rule as to who shall be consulted, each official whose department or function may be affected by the decision as to a problem case, or who can contribute information bearing on it, usually has an opportunity to express his

FIGURE I. (Front)

## PERIODIC PERSONNEL REPORT ON OLDER EMPLOYEE

(For use of major executive during interview)

Name..... Age 45 50 55 60 65 70 75 80 85  
 Department..... Present job.....

### SUPERVISOR'S REPORT

Attendance *Regular*.... *Considerable absence*.... Attitude *Cooperative*.... *Neutral*.... *Non-cooperative*..  
 Quantity of work..... Quality..... Change in quantity and quality during past year.....  
 Time lost due to lack of work?..... Employment prospects during next five years.....  
 If a transfer is necessary, on what jobs can he perform up to par?.....  
 What new jobs, if any, can he learn?.....  
 What advice can the executive give to help the employee maintain or increase his usefulness to  
 the company?.....

Supervisor's view of his personal and family financial needs, in case of retirement.....

### PERSONNEL DEPARTMENT REPORT

#### EMPLOYEE

Age..... Length of service with company..... Education.....  
 Present earnings per year..... How long at present rate?.....  
 Amount of savings accounts..... Investments..... Real estate..... Life insurance.....  
 Previous jobs in company.....  
 Previous jobs elsewhere.....  
 Predominant characteristics.....  
 Health prospects for next five years with reference to par performance—doctor's version.....  
 Suggestions for a change of occupation, if any.....  
 Suggestions for counsel to employee (health, work, finances, etc.).....  
 Suggestions for savings (or insurance) plan adequate for retirement at age 65 (or earlier if retire-  
 ment is likely to be earlier).....

#### FAMILY

MEMBERS	AGES	OCCUPATIONS	HEALTH	EDUCATION
.....	.....	.....	.....	.....
.....	.....	.....	.....	.....
.....	.....	.....	.....	.....
.....	.....	.....	.....	.....
.....	.....	.....	.....	.....

**FIGURE I. (Back)**

**REPORT ON INTERVIEW**

**EMPLOYEE'S VIEWS**

Personal Health.....  
Present and future capacity for present job.....  
Other work he can do well.....  
Financial Status.....  
Future Plans.....

**EXECUTIVE'S NOTES**

**COMMENTS**

**MEASURES AGREED UPON WITH THE EMPLOYEE AND INSTRUCTIONS FOR  
CARRYING THEM OUT**

*Signature of Executive*.....

*Date*.....

opinion. Consequently, the group consulted concerning one case may not be the same as that called to consider another situation. Two typical procedures may be of interest. A manufacturer of rubber products, for example, states that cases are referred to the personnel division for investigation. There, the individual's records, as compiled by the medical, safety, and production divisions, are studied. The decision in each case is reached by the personnel division in consultation with the other divisions which are affected. When a conclusion has been reached, the employee is assigned to his work in the same manner as a newly hired employee.

According to a company in the textile industry, cases are brought up by department heads. When it is apparent that action must be taken, the personnel department investigates and, in conference with the department head, decides upon a suitable solution.

Once a problem case has been discovered and investigated, the action to be taken on the case is determined. In most organizations, the president either reserves the authority to pass upon problem cases or delegates it to one of the line executives—to the vice-president in charge of production, the general manager, the plant manager, or the plant superintendent. In other instances, responsibility for decision is delegated to the personnel, industrial relations, labor or employment manager, rather than to the line officials.

There is a third type of procedure which may be called committee action. In its simplest and commonest form, committee action consists of an agreement between the personnel manager and the interested foreman, although, occasionally, other department heads may serve. To illustrate: In a certain automobile plant, action is determined by the foreman and personnel manager; in a rubber products company, the personnel manager and plant physician jointly agree upon the proper disposition of each case. In the latter company

the personnel and medical divisions are separate units of equal rank. An abrasive company reported that it has a personnel committee, composed of the personnel director as chairman and the three division managers who are responsible for production. After receiving reports from both the interested foreman and the personnel department, this committee determines the action to be taken in each case.

### Follow-Up

A MAJORITY of the companies that give special attention to older employees have no organized follow-up of such cases. They depend largely upon the methods of discovering problem cases previously mentioned in this report to bring to attention any older employee who, after readjustment, again becomes a problem case. In other words, these companies are of the opinion that further decline in an older employee's usefulness or an unsatisfactory disposition of his case comes to the attention of the management in the normal course of events.

Some companies, however, reported a plan for following up all transferred employees, after a reasonable period, in the same way as newly hired employees are followed up. A battery manufacturer, for example, has each man interviewed one month after he has been transferred. He is asked whether or not he likes his new job. If there is no complaint at that time, there is no further check-up. A watch manufacturer stated that all transfers are followed up periodically for a reasonable length of time; an engineering and construction firm reported the use of a check-up with the foreman to learn whether the transferred employee is adapting himself to his new job.

Occasionally, a follow-up for older employees exclusively was found. A manufacturer of food products, for example, has older employees examined periodically by the plant physician. Similarly, a plant in the non-ferrous metal industry stated that the plant physician examines all older

employees who have been given special attention, and that the superintendent observes and consults with the foreman regarding their work.

The last type of follow-up recognizes that sooner or later an older employee will become superannuated. Any form of occupational adjustment then will be unsatisfactory and continued employment will be no longer possible. The question then arises as to what financial provision, if any,

shall be made. A check-up in such instances often is conducted with this eventuality in mind. To illustrate: A certain company engaged in quarrying and stone cutting makes a semi-annual follow-up of all employees over age sixty-five to determine whether they should be continued on the payroll or pensioned. Another company—one in the food products industry—every three months considers older employees for pensions.

## II. CONTINUANCE AT THE SAME JOB

ASSUMING that an employee is to be retained on the payroll, management has two alternatives whenever a problem case is reported. It may be possible to continue the employee at his customary work through various changes in the conditions and terms of employment. On the other hand, it may be preferable to transfer him to another type of work for which he would be better suited from the standpoint of his present capacities and interests.

Many organizations report finding it extremely difficult to transfer older employees to other jobs. Often, the technical nature of operations is a handicap which cannot be overcome. Examples of this are found in the bookbinding industry, most of whose workers are skilled. Members of this industry stated that, when the efficiency of older employees begins to decline, it is impossible to find a sufficient number of jobs to which they can be transferred. A number of companies in other industries find that older employees often do not react favorably to transfer to other work. Years of experience at their regular jobs give to such workers confidence in their ability to perform this work efficiently. The suggestion that a change be made destroys their feeling of security and sometimes leads to loss of goodwill. Many organizations report that, for these and other reasons, it is necessary to retain certain older

employees at the same type of work which they have been accustomed to doing, if they are to be kept at any productive work at all.

The mere continuation of an older worker at his regular job, however, in many cases fails to bring complete satisfaction to employer and employee. Often, the company cannot profitably retain such an employee without making some employment adjustment; frequently, the employee is unable to fill the job unless the conditions of work are changed. When such adjustments are made, they usually involve the pay of the older employee, his hours of work, or the activities associated with his job.

### Wages

ONE OF the first questions to arise when it has been decided to continue an older employee on the same job is whether or not a change in the rate of compensation should be made. Apparently, there is considerable difference of opinion as to the circumstances under which a change is justified. The evidence accumulated indicates that few employers have established definite policies with regard to changes in the compensation of older employees and that most organizations prefer to treat each case individually. The methods of wage adjustment generally followed in individual cases consist of (1) reducing the rate of pay,

(2) changing from a time to a production rate, (3) changing from a production to a time rate, and occasionally (4) supplementing reduced earnings with payments from a special fund.

### ***Reduction in Pay Rate***

The facts that have been gathered indicate that employees paid on a production basis, *i.e.*, piece work or similar method of compensation, often are continued at their regular rate. The justification given for this method of treatment is that the employer suffers no direct loss if the older worker's production falls off, since the employee is paid only for the amount he turns out. The attitude of a manufacturer of men's clothing, as expressed in the following statement, is typical:

Our shops are on a piece-work basis. Therefore, whether you are 21 years old or 70 years old makes no difference. The 21-year old worker will accomplish more in a day than the 70-year old, but the cost is the same in both cases.

A company in the textile industry which operates under a task and bonus system reports:

Where we continue an older employee at the same job, we pay the prevailing job rate, but his income will be less because of his inability to earn a bonus over and above his hourly rate. Our bonus tasks are set sufficiently low to make possible the earning of a bonus, and we ordinarily expect it to be made. However, we make the concession of permitting the production of older employees to fall below even the hourly rate paid.

Some firms disagree with this point of view. They contend that subnormal production materially increases unit cost since fixed capital charges and overhead must be allocated to a smaller quantity of work.

Salaried persons or those paid at an hourly rate present another problem. Organizations, particularly those in highly competitive industries, assert that they cannot afford to keep such individuals at the same rate of pay after their efficiency has declined. This explains the tendency to reduce their pay commensurate with their decline in value. Clerks, maintenance workers, and hourly-paid employees in production departments are

reported to be the ones usually affected by this type of action. One company reports with reference to reducing the rate of hourly employees:

All work is performed and paid on an hourly basis. If an employee is continued on the same job, productive requirements are lowered and the hourly rate of pay decreased correspondingly, with a minimum living wage set as the smallest amount to be paid.

### ***Change from Time to Production Rate***

A few companies stated that they often continue older employees at their regular jobs provided the basis for compensation can be changed from a time to a production rate. When a revision is made, the new rate frequently is determined by dividing the individual's previous average earnings by his average production. Care often is taken that the new rate is not below a figure which will assure the employee a reasonable income. According to one company's statement, older employees sometimes are changed from an hourly to a production basis. Employees receive exactly what is earned on jobs for which piece rates can be set, but no base rate is guaranteed.

### ***Change from Production to Timé Rate***

Changes from production to time rates sometimes are reported. In certain cases, these are due to the fact that the earnings of an employee paid on a production basis have declined below the amount required to maintain a decent standard of living. In other instances, the nature of operations is such that, although older employees cannot produce their quotas, assignments of a special nature may be given to them, thus justifying their compensation on a time rate.

Among the organizations which have used this method in dealing with older employees is a manufacturer of brushes. The company stated that many older employees have been transferred from production to hourly rates. In a number of such cases, the company has taken advantage of the experience and skill of such employees by assigning



to them work on products which require greater concentration on quality than on quantity.

Another firm, a manufacturer of conveyors, cites an example which indicates that a somewhat similar procedure has been followed. Molders who, because of conditions traceable to age, were unable to turn out the quantity of work expected of them by the company, have been transferred to hourly rates of pay which assure them an adequate income. These men have been continued at their regular jobs, but special orders, particularly those involving customers' specifications, have been assigned to them. The company believes that the gain in quality caused by more careful application partly, if not entirely, makes up for the loss in volume of production.

As to the method of determining the hourly rates to be assigned such employees, there seems to be general agreement that the new rate of each should be based upon average hourly earnings over a fixed period prior to the change. Among the companies studied, this period varies from one or two weeks to a year.

### *Supplementary Compensation*

To make up at least part of the loss in income of older employees whose earning power has declined or whose rate of pay has been reduced, a few companies grant special supplementary compensation. The procedure followed by a company manufacturing gloves is typical. A large proportion of the work involved in glove-making is done by hand. As employees age, their knowledge and ability to produce superior goods increase and the volume of their production decreases. Inasmuch as pay is based upon piece-work rates, their actual earnings are reduced. Some years ago, the company recognized this situation and adopted a plan in which consideration of quality as well as quantity was given in determining the pay of employees. The plan provided for putting on the market an exceptionally high grade glove, the purpose

being to give customers the benefit of superior skill and working knowledge as well as to furnish older workers with opportunities for profitable employment. In order to compensate for close concentration on quality, a bonus for high class fabrication was made a feature of the plan. The company reported that, although profits from this arrangement have been small, the method of meeting the older-worker problem has proved satisfactory.

### *Allocation of Expense*

Another problem which often arises when older employees are retained at their regular jobs is that of the allocation of wage or salary cost on the company's accounts. Most firms reported that they follow the practice of charging the entire cost to the job or department to which the individual has been assigned. Other companies state that this method of accounting is unsound in many cases. Such organizations pointed out that the performance of many older employees is substandard and, therefore, that it is unfair to place the entire expense burden of their pay on the job or department with which they are associated. Among these concerns, the policy is to reduce the departmental or job charge to the approximate value of the employee's services. The balance is regarded as a form of pension and, therefore, is charged to an overhead account created specifically for this purpose.

### *Hours*

A SMALL number of companies stated that they have been able to retain older employees at their regular jobs through such changes as reduced hours or days of work, transfers in shift, and rest periods. Change in working periods was reported less frequently than wage adjustments by the companies cooperating in this study.

### *Reduced Hours and Days of Work*

Disability traceable to age often has made it inadvisable to require an employee to conform

to established hours and days of work. He may prove satisfactory during part of the work period, but beyond that may tend to become inefficient. If he is to be retained, it may be advisable to reduce his schedule of working hours to the point where it is reasonable to assume that he will be an asset to the organization. A number of instances in which this method of dealing with older employees has been used were reported. For example a steel company stated that as a result of a reduction in the daily working hours of a number of older workers it has been possible to continue them at their customary jobs. In most of the cases cited by this concern, hours were reduced from eight to six per day. The company justifies this procedure by the explanation that, although the total production of these individuals is less, the unit cost of what they are turning out is close to if not better than standard.

A garment manufacturing company reported that in several instances the starting and leaving time of older employees has been changed to shorten their work day and also to permit them to avoid travel during the rush hours.

A manufacturer of abrasives applied another method of treatment in several cases. For example, two employees with similar duties were unable to work efficiently full time. They were assigned to a single job. As to working hours, the company specified merely that the job should be filled at all times. It was explained to these employees that they could arrange between themselves what hours or days they would be at work. If they desired to divide a day, they were permitted to do so. If they preferred to work full days but part of a week, they could do that. These two individuals thus actually served as a single employee.

A variation of these practices recently was adopted by a company which manufactures machines used in the metal industry. An analysis of the personnel brought out the fact that five

older employees were problem cases. Three of these men were physically unfit to work and, therefore, were retired on pension. The remaining two individuals retained sufficient ability to justify their continuation on the payroll, if adjustments were made. The company decided to give them half pay and specified that they were expected to report for work only when they felt able or when they were needed to furnish emergency assistance.

### *Transfer in Shift*

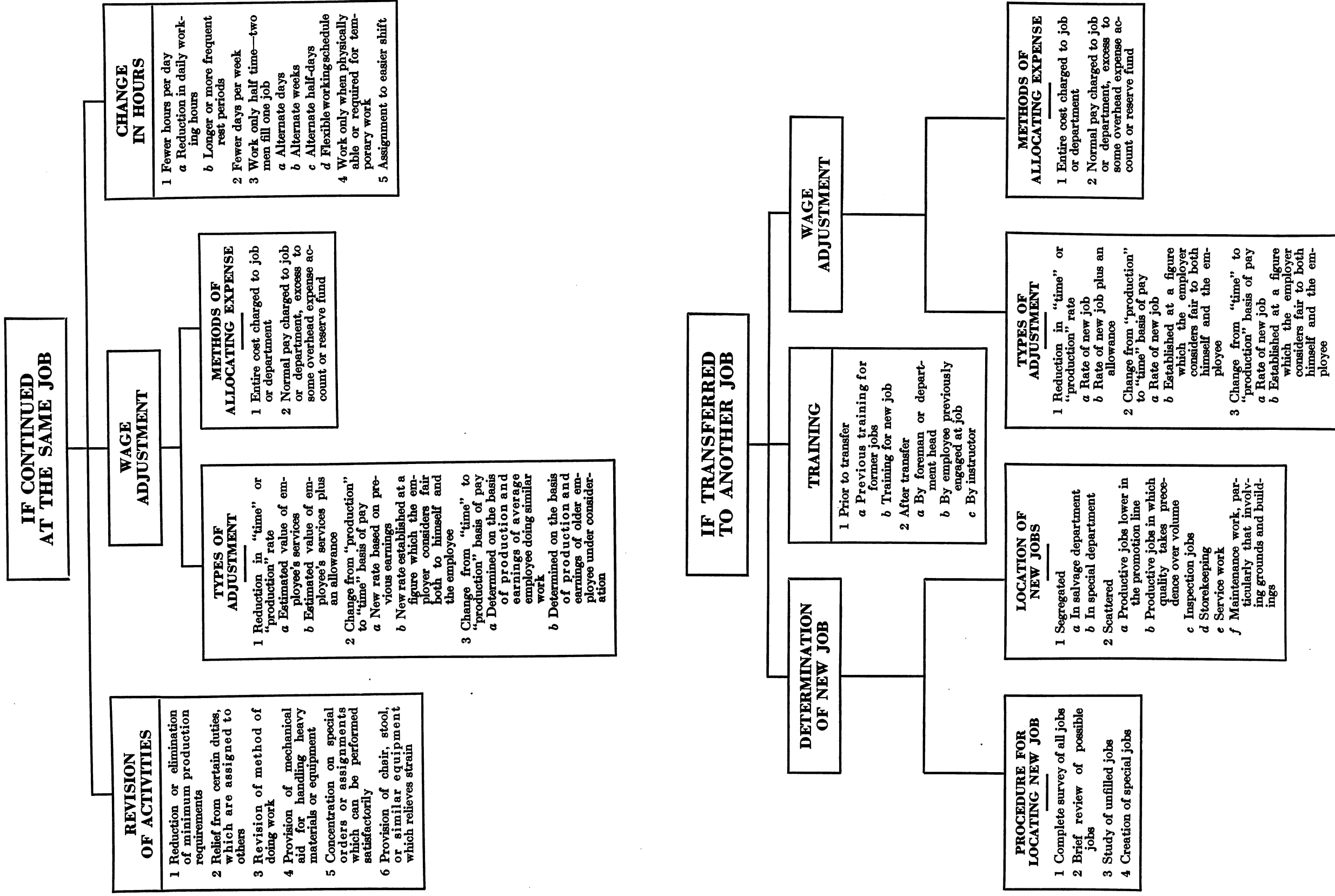
Continuous operations often furnish opportunities for another type of adjustment. A number of companies reported that many older employees have been retained at their regular jobs through assignment to an easier shift. A chemical firm cited a typical example of this practice. One of its processes is of such nature that entire responsibility for handling raw materials rests with those working on the day shift. The late night shift removes the finished product. Between the two is an evening shift which does little heavy work. This is the shift to which older employees have been assigned. A foundry which normally operates day and night indicated that similar changes have been made. For example, the day shift is manned by younger employees, whereas older workers are assigned to the night shift because working conditions are less strenuous, due to relief from the heat of the day.

### *Rest Periods*

One company stated that, through rest periods, many older employees have been enabled to extend the duration of their employment at their regular jobs. Although no fixed schedule of rest periods has been established, older employees are permitted to stop work temporarily whenever they feel the need of relaxation. The company, however, retains the right to discontinue this practice if the privilege is abused. Inasmuch as most of these employees are compensated at a time rate, their wages are not affected by a stoppage of work.

# THE OLDER EMPLOYEE CONTINUED ON PAYROLL

## DETAILED CHART OF POSSIBLE PROCEDURES



### Activities

Most problem cases arise because older employees are unable to continue to perform their daily tasks in the prescribed manner. Often, one or a few features of their jobs are entirely responsible for this situation. If changes can be made, it frequently is possible to retain the services of such employees. One of two forms of action is generally preferred:

1. Rearrangement of duties.
2. Provision of special mechanical aid.

#### *Rearrangement of Duties*

Many companies in diverse fields indicated that they have succeeded in prolonging the period of service of older employees by relieving them of those parts of their jobs which they cannot perform. In some cases, many older workers have been retained through the assignment of helpers who assist them with the more strenuous activities associated with their jobs. For example, a steel company reported that a number of older employees who were engaged in jobs which are paid for on a tonnage basis have been given helpers, who, in turn, receive a percentage of the wages paid for such jobs rather than the rate for helpers. A candy manufacturer allows helpers to assist production workers when their jobs require heavy lifting. A foundry reported that helpers are given to molders and core makers when these employees are too old to withstand the heat of hot metals or ovens. An alloy steel company cited an example of this practice with reference to the supervisory force. At one time, a foreman who was no longer able to perform the normal duties connected with his job was given the assistance of an understudy. It was agreed that the understudy would prepare himself to succeed the foreman and assist him in performing the tasks of his position requiring the most physical exertion. A rubber company, also, mentioned the case of a foreman whose hours were reduced and whose duties were curtailed so that

they now are confined to the less active responsibilities of his job. His other tasks were assigned to a squad boss.

A number of companies have solved the problem in some cases by regrouping the duties of older employees. In most instances, this has been accomplished by relieving them of certain responsibilities, or by assigning to them only those orders which they can handle efficiently and safely. Several typical examples of how this has been done may be cited.

One manufacturer stated that older employees in the stock-room have been retained by rearranging the activities of those assigned to that department. Responsibility for handling stock has been given to younger employees and stock-taking and counting assigned to the older members of the department. A clothing manufacturer reported that operations requiring good, if not exceptional, eyesight have been reorganized to permit the continued employment of older men. In this case, features of the job in which normal eyesight is important have been taken away from older employees and assigned to younger men.

Orders for products of a special nature or of a lighter weight sometimes are given to older employees to permit their continuance at the same job. For example, a meat packer reported that employees who have been accustomed to dressing meats but no longer are able to do heavy work are given lighter assignments on the same job. Another company, a foundry, assigns to older employees orders of a special nature which usually require less physical effort than the standard orders put through the plant. Besides being relieved of the necessity of working on heavy standard orders, the older employee often is permitted, also, to turn out less than the normal quantity of work.

#### *Special Mechanical Aid*

Improvement in production methods, particularly those involving the introduction of labor-

saving equipment, seems to have aided some organizations in dealing with problem cases. For example, a company manufacturing rubber boots stated that, prior to the introduction of a conveyor system on the production line, each employee had to lift lasts weighing about twenty-five pounds. This required considerable exertion and, consequently, made it difficult for older employees to remain at these jobs. Under the present method of manufacture, the lasts are carried on a conveyor

and little lifting is required. The new arrangement has permitted the retention of many older workers who could not have been kept at the job without this change. A manufacturer of machinery reported a somewhat similar experience. The installation of jib cranes and other material handling equipment to facilitate the lifting and handling of heavy parts in process has made it possible to extend the length of service of a number of older employees of this company.

### III. TRANSFER TO ANOTHER JOB

Most organizations that recognize the need for giving special attention to older employees to permit retaining them on the payroll reported that transfer to another job is the easiest and most frequently used method of dealing with such problem cases. Practically all the companies covered by this investigation indicated that this method of treatment has been applied. One firm stated that the judicious transfer of older employees over a period of more than seventy-five years in many cases postponed the date of retirement and thereby reduced the cost of the company's informal pension plan.

#### Conditions Favorable for Extensive Use of Transfers

THE WIDESPREAD use of transfers is reported by organizations in which a considerable number of employees are capable of filling jobs other than their own. Such a condition depends upon:

1. The number of jobs at which the common handicaps of age normally do not serve as a bar to employment; and
2. The previous training, experience, and capacities of the majority of older employees with respect to these jobs.

Work unsuited to the needs of most older persons is that involving considerable muscular exertion, physical or mental strain, or keen eyesight or

hearing. Several companies, in order to explain why they are able to transfer older employees, stated that most of their work is light, that much of it is done in a sitting position, or that it is of such a nature that speed is not a primary consideration. Conversely, a few companies, in pointing out why they have not been able to make transfers, reported that most of their operations involve heavy work or that speed in production is an important factor.

Prevalence of unskilled or semi-skilled rather than skilled jobs in an organization is another reason for an extensive use of transfers. For example, a chemical company indicated that a large proportion of the work done is of a semi-skilled or unskilled nature and, therefore, an older man assigned to another job can be taught his new duties within a comparatively short time. A manufacturer of machinery, in explaining why transfers usually are impossible, cited the fact that most of the jobs are skilled and that an employee often specializes in one type of work. For this reason, considerable training is required to learn a new job and the company estimates that on the average it costs about \$200 to train a man.

Still another factor favoring an extensive use of transfers is prevalence of older workers who have had a diversified training. Within the past decade, a number of companies, in order to stabilize

employment, have adopted programs for training employees to fill several positions, thus enabling transfers to be made in the slack season from one department to another. A manufacturer of grocery products states:

This policy has been followed in the past when operations involving employees' regular jobs have fallen off and it has been necessary to assign them to other departments. In consequence, when employees no longer are able to continue at their regular work due to advanced age, it is comparatively simple to assign them to other jobs.

Similarly, a manufacturer of paper products comments on his program of diversified training as follows:

Employees are trained to do various classes of work and, if older persons are unable to continue at a higher type of job, they are dropped back to a lower type in which they are experienced.

In other companies, employees acquire diversified skill from long experience in the industry. According to a manufacturer of rubber products, most of the men employed are former rubber workers and, as a result, transfers are very easy from one job to another. It was stated that a large number of jobs have been broken up into such simple operations that an employee can learn almost any one of these in about fifteen minutes. The only essential qualification is a strength and toughness of the hands which comes from handling rubber. According to another executive, whose company manufactures leather goods, most older employees have worked their way up in the company and are familiar with the jobs to which they are transferred.

Development of ability to perform more than one job has been found to help employees to accept change as normal. Some executives believe that change is a normal rather than abnormal occurrence and that employees should be brought to realize that this is true. Thus, the habit of willingness to consider new ideas is more easily developed. In addition, the productive value of employees and their security of employment not only are in-

creased, in the opinion of many executives, but opportunities also are given for broadening their knowledge of the business, thus providing a stimulus for constructive mental activity.

In some instances, companies find it possible to transfer older employees to other positions even though some training is required. In a majority of cases, however, very little training is given and then usually "on the job." A chemical company, for example, reported: "An older employee often is placed on a job where he is able physically and mentally to carry on the work. Such jobs have no high standards and very little training is required." Such training on the job is conducted usually by the foreman or an assistant. One company, however, mentions that older employees are placed on suitable jobs and are given training by specialized instructors.

### Selection of Jobs

PROCEDURES followed in ascertaining the jobs to which older employees can be transferred differ considerably. Most companies, when a problem case arises, informally review all available jobs which might be suitable for the older employee. Some firms report that in making such reviews they have employed job analyses originally undertaken for other purposes. One company stated that all occupations have been classified according to the degree of manual labor required and that these classifications have proved useful. Other concerns indicated that older workers themselves are invited to suggest the type of work they believe they can do. A few companies, however, in anticipating problem cases, have made comprehensive surveys in order to determine and segregate those jobs to which older workers may be assigned.

### Job Surveys

The firms which have made comprehensive job surveys to ascertain what positions are suitable



for older workers are engaged in diverse fields. Among them are manufacturers of chemicals, rubber goods, batteries, and conveyor equipment. They vary in size from a company of approximately twelve hundred employees to a corporation normally employing more than thirty thousand.

Several years ago, a comprehensive job analysis of the entire organization of one of these companies was made. Job specifications covering every position in the principal producing unit were prepared. In an effort to utilize this information to the maximum extent, it was decided to analyze these specifications to ascertain what positions might be filled by men of advanced age or by those disabled while at work. The specifications covering the jobs selected as suitable for this purpose were "flagged" for the benefit of the employment department and the company adopted the policy of filling vacancies in these positions only through the transfer of older or disabled men. The company estimated that over 5 per cent of the positions in the organization were in this category.

Another company made a somewhat similar survey in connection with a study of hidden pension costs. Representative plants within the organization were selected for investigation. The objects of the study were to determine (1) how many workers were employed at jobs on which they no longer were efficient due to conditions arising out of age, and (2) to obtain a list of jobs which might be performed by this group of workers. A representative of the personnel department was given responsibility for the survey. He visited each plant and discussed with the manager the possibility of there being employees who should be reassigned to other work in his organization. The plant managers willingly cooperated, since they recognized this as an opportunity for improving operating efficiency. The names of employees recognized as problem cases and information regarding their medical, safety, and production records, were assembled. In addition, a

comprehensive list of jobs suitable for these employees was compiled. Both were referred to the plant managers with the suggestion that the employees unfitted to continue at their usual work be assigned to jobs selected as suitable for them. Thus the entire procedure was made a matter for individual plant action. Within the units studied, more than 6 per cent of the jobs were found to be of such nature that older men might fill them. It is now the policy of this company to fill these jobs only through the transfer of older men.

A third company accomplished a similar result through a slightly different procedure. The safety director, the medical director, and the head of the welfare department (to whom the safety and medical directors report), independently surveyed every department in the plant. The three men each observed the work being done in various departments and selected the jobs which seemed suitable for older workers. Afterwards, they jointly reviewed the selections each had made and reconciled any differences of opinion. As a check on their conclusions, they submitted the list of suitable jobs to the supervisors directly concerned. This was followed up by personal consultation with the department heads and a definite understanding was reached as to specific jobs to which older workers might be assigned. Approximately 4 per cent of the positions in the organization were agreed upon by every one as being suitable for older employees. To assure the proper use of the facts and conclusions obtained during this survey, the company adopted the policy that, in the future, the jobs selected should be filled only through transfer of older workers.

### Location of Jobs

REPORTS from cooperating companies indicated that occupations for older employees have been found in many departments of typical industrial establishments. Transfers of skilled production workers often have followed the reverse order of

lines of promotion. For example, in a smelting plant, the largest class of employees are furnace men. They work in groups of ten in charging the retorts. Each man has specific duties to perform and the rate of pay is graduated according to the work of each. When a new man is hired, he usually starts at the lowest paid job in the group and often works up to the highest paid. As the older men, who are working on the highest paid jobs, such as chargers, find the work too difficult, they drop back into the lower paid operations requiring less physical effort. In many cases, the older employees themselves request such changes when they cannot keep up the pace set by the group as a whole.

In plants using automatic machinery, it sometimes is possible to find suitable jobs on production work. A company engaged in packaging food products furnishes an illustration. Studies have been made and older persons often are transferred to the easier operations. In other words, transfers are made to jobs which involve lighter work and less manual rapidity to keep up with the speed of the machines.

Ultimately, it has been found, most older employees must be transferred to semi-skilled or unskilled occupations, primarily because of the cost of retraining which must be written off before the older person is handicapped further. The bulk of jobs reported by employers as suitable for older workers are located in departments responsible for maintenance, service, inspection, and storekeeping. The commonest jobs of this type are listed in the following section of this report.

A few companies have endeavored to solve the problem by establishing special departments manned solely by older employees. In most cases, the function of these units is to inspect and salvage parts or finished products. One firm adopted this idea about eighteen years ago. Those assigned to the special department were engaged principally on salvage work. For example, several

men graded scrap, while others stored scrap. Another group inspected, salvaged, and placed in stock returned products. Still others were assigned the task of maintaining certain equipment used in conveying parts. Within the salvage department, five able-bodied men were employed to do the heavy work. It was considered somewhat in the nature of a flying squadron. At the present time, the work of the department has been considerably curtailed, due principally to the fall in the prices of raw materials below the point of profitable salvage operations.

Several other companies stated that departments to which older or disabled workers are assigned have been created. For example, a prominent automobile firm has a "repair department" to which rejected parts are sent for repairs or adjustments. The only persons placed at these jobs are skilled workers who cannot be retained at their regular jobs because of disabilities traceable to their occupations or age. Another firm, one which manufactures fibre products, has set up a similar department. All jobs have been restricted to older employees or workers recovering from a serious illness or accident. Salvaging, sorting, and packing of products are the present operations performed by those assigned to this unit.

Another company stated that it has under consideration a plan for establishing a special department for older employees. Because of the increasing number of older-worker problem cases, the chief operating executive asked the Research Department for recommendations for meeting this situation. As a possible solution, the Research Department developed a new product that can be made by older workers and for which there is a potential market. Furthermore, it reported that the company is equipped to manufacture the new product at a satisfactory price, that waste from the plant will furnish the principal raw material, and that older persons can be employed profitably. The article is artistic in design, fairly light to

handle, and requires hand rather than machine operation. The plan under consideration for the production of the new item calls for a separate manufacturing building with unusually healthful and pleasant working conditions. It is proposed also that only employees having a minimum of thirty years' service with the company shall be eligible for transfer to this type of work.

### Typical Jobs

Companies contributing to this survey named numerous jobs to which older workers have been transferred. These jobs appear to have been selected either because of the nature of the work or the special qualifications of the individual under consideration. As typical of suitable occupations, many firms mention the work done by watchmen, elevator operators, and messengers. One company reported the assignment of an older employee to the job of technical adviser. The company stated: "This man has a wonderful mental background in structural steel work, but is unable to get around very well. He is retained by the Engineering Department more or less as a special adviser."

Reports from companies cooperating in this study indicated that there are numerous jobs common to almost every type of industry and widely accepted as suitable for older employees. Among these are the following:

Assemblers on light work	Laborers on light work
Bench workers	Messengers
Blueprint machine operators	Minor clerks
Checkers	Oilers
Crib keepers	Packers
Elevator operators	Porters
Firemen	Reception clerks
Gatemen	Repairers on light work
Groundkeepers	Salvagers
Guides	Stock or stores clerks
Inspectors	Watchmen
Instructors	

Employers in specific industries named many jobs found only in their plants, which have been

filled satisfactorily by older employees. For example, foundries report the following occupations:

Bench core-maker	Ladle liner
Cleaner	Matchmaker
Filer	Molder of small castings
Flask storage man	Pattern storage man
Gangway man	Straightener of core wires

### Wages

JUDGING from the comments of industrial executives cooperating in this study, practices differ in determining the pay rate of a transferred older employee. Most of the executives specifically state that such an employee receives the rate which would be paid any other employee for the same work. The explanation given in most cases is that competitive conditions force the adoption of this policy.

A few companies indicated that they have continued these employees at the old wage rates, even though in such instances older workers are overpaid in terms of the value of their present services. One concern, in explanation, points to the fact that these employees represent an available labor surplus which may be drawn upon when there is a temporary need for workers with experience.

Other employers reported that fixed practices with regard to wage changes are avoided. In such cases, several principles generally are applied. The following statement of one company is typical:

The length of service of a man, his living requirements, and the rate on his former job are taken into consideration. From this information, the new rate is determined. This may be the same as the old rate, the rate of the new job, or the rate of the new job plus a subsidy.

A variation of these procedures is that followed by a manufacturer of machinery: Older employees who are transferred to other jobs are continued at the old rate of pay for one or two years depending upon individual circumstances. Gradually, their pay is reduced to about 75 per cent of the former rate.

In some instances, supplementary compensation is paid to make up part of the employee's loss in income due to his transfer to a job paying a lower rate. One organization has established a fixed proportion of the loss which the company is to make up through a subsidy. In this case, the subsidy is charged to an employee pension account. Another company determines the amount

of extra compensation on an individual case basis. A percentage of this subsidy varying from 25 to 50 per cent is charged to pensions. The balance is charged directly against the job at which the individual is employed. A third company provides for the payment of supplementary compensation out of a benefit fund for one year after which the supplementary payments cease.

#### IV. SUPPLEMENTARY MEASURES AFFECTING OLDER EMPLOYEES

IN RECENT years, there has been a noticeable tendency among industrial organizations to adopt various measures for the protection of employees against illness or injury. Usually, these have been designed for the benefit of all employees. In some instances, it has been found advisable to supplement them with additional provisions for classes of workers who are in need of special attention. A few companies, apparently convinced that older employees as a group require greater care in this respect, have introduced special features within their medical and safety programs solely for the benefit of older workers.

##### Medical Supervision

IN MEDICAL programs, physical re-examinations constitute the principal provision for maintaining the health and safety of older workers. Some companies give these examinations only to employees above a fixed age; other firms provide more frequent examination of older persons; a few organizations conduct more thorough rather than more frequent physical tests as employees advance in age.

To illustrate the use of a fixed age, it was found that one company examines annually all employees over 45 years of age, while younger employees are examined only upon request. In commenting upon this practice, a representative of the concern

stated that it aids the company in learning of physical disabilities that may be corrected to a greater or less degree by vocational adjustment or medical care.

A railroad follows the practice of examining older employees more frequently than younger workers. Employees connected with the train, engine, yard, and signal service are re-examined at the following intervals:

Men under fifty years of age	—Every three years
Men between fifty and fifty-five	—Every two years
Men fifty-five and over	—Every year

The officer in charge of personnel reported that these re-examinations "have aided in bringing about greater continuity of employment, in increasing efficiency, and in extending the economic life of employees."

Several firms stated that physical re-examinations given older employees are more thorough and that special effort is made to ascertain the degree to which certain conditions, often caused by age, have developed. For example, a manufacturer in the automotive field has adopted this procedure:

About the same type of physical examination is given as that given to other employees except that special emphasis is made as follows:

1. History of past illnesses
2. Blood pressure and heart condition
3. Urinalysis
4. Vision and hearing tests

In discussing the value of this practice, the company physician remarked that it has been a very important factor in the maintenance of harmonious relations with employees, particularly those in the older ages.

### Safety Supervision

SEVERAL types of safety measures have been introduced for the benefit of older employees. For example, many employers state that older workers, particularly those suffering from disabilities traceable to age, are assigned to jobs of a more or less sheltered nature where they are little, if at all, exposed to industrial hazards. This explains the tendency to consult the person responsible for safety activities before reassigning these individuals.

Some companies, to be certain that an older worker does not injure himself, take pains to see that his method of doing his particular job does

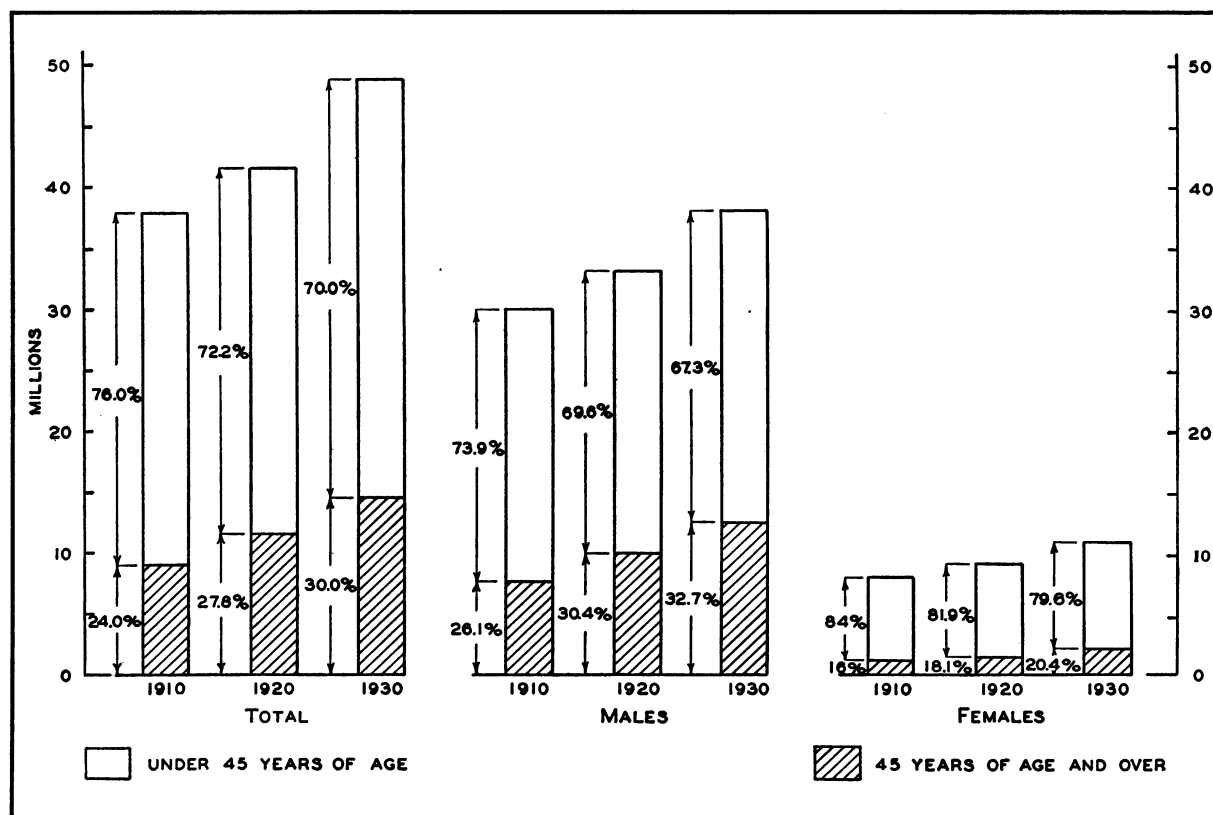
not expose him unduly to the risk of accident. A manufacturer of machinery, for instance, requires the safety director and the employee's foreman to check over his activities periodically to make certain that the chances of his being injured are minimized. One large organization assigns an instructor to the older employee if he is transferred to another job and thus he is taught both the best and safest way of doing that particular type of work.

Finally, certain organizations that have made comprehensive studies to ascertain which individuals are accident-prone stated that, through these surveys, many older employees whose accident records were very unsatisfactory have been segregated and that constructive action has been taken. Thus, accident-prone study\*—a safety measure primarily designed to detect employees needing special attention—has resulted in indicating desirable steps for the protection of workers of older ages.

\*For details, see Policyholders Service Bureau report—"The Accident-Prone Employee."

# APPENDIX A.

## AGE DISTRIBUTION OF GAINFUL WORKERS IN THE UNITED STATES



	TOTAL GAINFULLY OCCUPIED WORKERS	GAINFULLY OCCUPIED WORKERS 45 AND OVER	
		<i>Number</i>	<i>Per Cent of Total</i>
1910	38,167,000	9,149,000	24.0
1920	41,614,000	11,594,000	27.8
1930	48,830,000	14,627,000	30.0
	TOTAL MALES	MALES 45 AND OVER	
		<i>Number</i>	<i>Per Cent of Total</i>
1910	30,092,000	7,861,000	26.1
1920	33,065,000	10,045,000	30.4
1930	38,078,000	12,445,000	32.7
	TOTAL FEMALES	FEMALES 45 AND OVER	
		<i>Number</i>	<i>Per Cent of Total</i>
1910	8,076,000	1,288,000	16.0
1920	8,550,000	1,549,000	18.1
1930	10,752,000	2,181,000	20.4

SOURCE: Table 19—Occupational Statistics, United States Summary, 1932, United States Bureau of the Census.



## APPENDIX B.

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