



Older workers.
(1953)

The effectiveness of older personnel in retailing

INSTITUTE OF
INDUSTRIAL RELATIONS

NOV 25 '53

Robert L. Peterson

BUSINESS MANAGEMENT SERVICE

COLLEGE OF COMMERCE AND
BUSINESS ADMINISTRATION

UNIVERSITY OF ILLINOIS BULLETIN

(University of Illinois Business Management Service
bulletin no. 607)

[Urbana, Ill., 1953]

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Paul M. Green, Dean of the College of Commerce and Business Administration.

Robert G. Seymour, Director of the Business Management Service.
Business Management Service Bulletin No. 607

UNIVERSITY OF ILLINOIS BULLETIN

Volume 50, Number 67; May, 1953. Published seven times each month by the University of Illinois. Entered as second-class matter December 11, 1912, at the post office at Urbana, Illinois, under the Act of August 24, 1912. Office of Publication, 358 Administration Building, Urbana, Illinois.

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the effectiveness of **older personnel** in retailing

the effectiveness of older personnel

- **introduction**

We were surprised! Like many businessmen, we believed that there must be a sound, practical basis for the prevailing practice of rejecting older workers in most organizations. Youth and vigor, we assumed, were synonymous with dependability and high production, but just the opposite seems to be true in retailing.

Older personnel, those sixty and more, are the backbone of our retailing organizations. They surpass their juniors in just about every work consideration. As a matter of fact, this study indicates that a retail organization is losing a lot of valuable productivity if it follows a policy of dropping all employees at age sixty or sixty-five; and such an organization is clearly by-passing an important source of dependable personnel if it fails to consider older people for employment.

This study of the effectiveness of older workers in retail stores was prompted by an actual selling situation reported in *Sales Management* magazine (Fig. 1). Could it be true that the best selling is being done by older people? Managers and buyers in several stores were contacted. Surprisingly, the senior workers were reported to be out-producing the juniors.

With these comments as a stimulus, it was decided to undertake a re-

in retailing

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search project on older personnel and their effectiveness in retail stores. Using a simple questionnaire (Fig. 2), steps were taken to obtain ratings from department managers and buyers in various Illinois stores. All employees in these stores who were sixty years of age and older were rated.

• **evaluation procedures**

The usual procedure was to obtain permission from a top official of the store to interview individual department managers. Then we asked the managers to give us an evaluation of each employee in his department sixty years of age and older. Questions were asked directly from the form on which the responses were recorded. In some cases, the forms were left with the managers to be filled out at their convenience.

Managers were encouraged to evaluate older workers realistically and objectively. This was done to insure against any tendency supervisors might have to "halo" their evaluations or to think more charitably of employees than the facts warranted.

Supervisors provided ready, concise answers to questions about their older workers in nearly all cases. Some had to check personnel and sales

77. Age Is No Handicap

B. Altman's, New York Clock Department

I had waited until Thursday to buy a present for a Sunday wedding, and being a sucker for quality store names I walked rapidly across B. Altman's first floor wondering where to find a service offering aid in buying wedding presents.

An elderly lady behind the clock counter was not engaged and I asked her. "Yes," she said, "we have such a department, but have you thought of a clock?"

I hadn't. "Are they young people?" she asked. They were. "Will they be living in an apartment?" They would. "Well, apartments in New York are small for most newlyweds and I would suggest (picking a clock from the showcase) one of these Telechron wood finish alarm clocks. It fits well in a living room or a one-room apartment, since it isn't ivory or pastel colored."

"How much is it?"

"The case, you see, is genuine walnut, not plastic made to look like wood. (She was gently rubbing the case.) It's a beautiful timepiece that will make an enduring present. It's much more practical than some of the more traditional gifts. And it's only \$11.95."

She had me. "Can you gift wrap and deliver?"

"Certainly. Charge or cash?"

(Editor's note: Broadly speaking, the best selling is being done by oldsters who went through the hard selling days of the 1930's, but unfortunately the *average* retail salesperson is under 30 and never has had to SELL.)

Fig. 1. From *Sales Management* magazine

Fig. 2.

UNIVERSITY OF ILLINOIS BUSINESS MANAGEMENT SERVICE

Company _____

study on utilization of older workers

Questions to be answered by supervisors concerning each employee sixty and over

Name of Employee _____ Age _____

Kind of work being performed _____

About how long employed in organization _____

How many more years do you feel this employee will be able to perform satisfactorily on present duties? _____

How would you rate the over-all performance of this employee

_____ Excellent _____ Very good _____ Good _____ Fair _____ Poor

In comparison with average younger workers, please rate this employee on

Absenteeism _____ Less _____ About the same _____ More

Getting along with others _____ Less _____ About the same _____ Better

Dependability _____ Less _____ About the same _____ More

Sales or Work Volume _____ Less _____ About the same _____ More

What, if any, age-connected weaknesses (mental or physical) have you noticed in this employee?

records to obtain accurate responses to questions on age, absenteeism, and sales performance; but for the most part, supervisors had no difficulty evaluating these employees.

When evaluations were tabulated for employees sixty and older in a dozen small and middle-sized stores, the results were so favorable to older people that we thought something was wrong.

"Why not include a large Chicago store in the sample?" someone suggested. So we did. We went to THE FAIR in Chicago where, with the cooperation of the store manager, ratings were obtained on all sixty-and-over workers in this State Street establishment. The pattern of responses at THE FAIR favored the older personnel in about the same percentages as were found in smaller stores.

The sample has been expanded to include twenty-two typical retail stores; and the ratings on which this study is based consist of individual evaluations by management of 527 employees, constituting employees sixty years of age and older (excluding some top officials) in the following companies: Bergner's, Peoria; Block and Kuhl Co., in Danville, Galesburg, and Peoria; Globe Department Store, Waukegan; Joseph Kuhn and Co., Champaign, Kaufman's, Inc., Champaign; Kellogg Drake Co., Galesburg; Linn and Scruggs, Decatur; Livingston's, Bloomington; Meis Brothers, Inc., Danville; Myers Brothers, Springfield; P. O. Fogerson, Villa Grove; Petty's Department Store, Effingham; R. F. Herndon and Co., Springfield; Robeson's Department Store, Champaign; The Charles V. Weise Co., Rockford; The Fair, Chicago; W. Lewis and Co., Champaign; W. H. Roland Co., Bloomington; Woodbury Book Store, Danville; and Worthen Dry Goods Co., Hoopston.

• characteristics of the group

Older workers constituted about ten per cent of the total employees in the twenty-two stores. The average age of all workers in the survey was 65.1 years. They were distributed into age categories as follows:

Age groups	60-64	65-69	70-74	75 and over	TOTAL
Number	229	176	84	38	527
Per cent	44	33	16	7	100

Five employees were more than eighty years old. The two eldest employees were eighty-three years of age. Both of these workers were buyers for their firms; and while one was rated *fair*, the other was rated *excellent*.

Occupationally, salesclerks dominated the group and represented forty per cent of the total employees. Next in order were seamstresses and tailors, representing twelve per cent of the total. Receiving and marking employees totaled eleven per cent; maintenance and custodial employees totaled eleven per cent; buyers and managerial personnel totaled ten per cent; and office personnel totaled eight per cent. Other types of personnel represented were

food service workers, cabinetmakers, elevator operators, and watchmen. Sixty per cent of all employees in the group studied were women.

Few of the workers included in the survey had spent their full working lives with their present organizations. Of the 527, forty-six per cent had been with their present organizations *less than ten years*. Only twelve per cent had been with their organizations thirty or more years. The longest term of service was held by a woman of seventy-nine years who was Chief Cashier in a large department store. She had been with the company for sixty-two years. The average length of service of all employees was 14.4 years. Classified by age groups, the average length of service was as follows:

Age groups in years	60-64	65-69	70-74	75 and older
Average years of service	12	14	18	23

The following paragraphs outline the specific findings relating to the performance of these older workers:

• **ratings**

OVER-ALL PERFORMANCE. All employees included in the survey group were given one of the following ratings by supervisors on over-all performance: excellent, very good, good, fair, or poor. Supervisors were asked to compare the performance of the individual with their own standards of what constituted a satisfactory employee. It was emphasized that employees who were competent and satisfactory — neither superior nor inferior — should be rated *good*; ratings higher than good should be reserved for outstanding employees. The ratings were distributed as follows:

Excellent	Very Good	Good	Fair	Poor
20%	29%	37%	13%	1%

No important differences appeared in the ratings assigned to employees in the four age categories. While one might expect the favorableness of the ratings to decline sharply as age increased, the figures do not support such an expectation.

	60-64	65-69	70-74	75 and older	AGE IN YEARS
Excellent	22	18	15	18	
Very Good	29	28	35	21	
Good	37	36	37	45	RATINGS IN PER CENT
Fair	11	16	12	16	
Poor	1	2	1	0	
	(229)	(176)	(84)	(38)	NO. IN GROUP

These ratings show that older personnel in retail stores are a credit to themselves and to their employers. Note that seven-eighths of these employees were rated as *good* or better. Even more interesting is the fact that cost-conscious managerial personnel rated nearly half of these workers as better than *good*.

The question arises as to how younger workers in these stores would have fared in a similar evaluation of over-all performance. Although no ratings of younger personnel were prepared, it seems unlikely that employees under sixty years would have received more favorable ratings. Supporting this conclusion are the following data in which performance of older workers is specifically compared with that of younger workers.

ABSENTEEISM. Older workers far excel their juniors in being on the job each morning. In preparing ratings on absenteeism, managers were requested to compare the record of absences of each older worker with that of *average younger workers*. The ratings for older personnel were distributed as follows:

Reported to have less absenteeism	70%
Reported to have about the same absenteeism	21%
Reported to have more absenteeism	9%

A breakdown of ratings by age categories showed no significant relationship between absenteeism and advancing age. Employees of seventy-five and over had a record of absenteeism almost as favorable as that of employees ten and fifteen years younger. Ratings by age categories were as follows:

	60-64	65-69	70-74	75 and over	AGE IN YEARS
Less absenteeism	73	65	75	68	
Same	18	29	12	18	RATINGS IN PER CENT
More absenteeism	9	6	13	14	
	(229)	(176)	(84)	(38)	NO. IN GROUP

How can the excellent attendance records of older workers be accounted for? Some say that fear is responsible. Because the older worker realizes his employment opportunities are limited, he feels he *must* be on the job. But others attribute this excellent record to the fact that older personnel are more conscientious and stable in their work habits. Freed of many of their family obligations and having discovered the satisfactions of a regular occupation, they feel a greater incentive to be on the job.

A store manager in Bloomington reported that on one particularly icy morning, when public transportation was at a standstill because of snow drifts, all older employees were at work when the store opened; but a large number of younger workers phoned that they would be unable to get to work.

These ratings also confirm the findings of geriatricians that illness and disease are not inevitable companions of old age.

GETTING ALONG WITH OTHERS. Human relationships was another area where older workers rated favorably. Each worker was evaluated in comparison with *average younger workers*. The distribution of ratings is as follows:

Reported to get along better with others	31%
Reported to get along about the same	54%
Reported to get along less well	15%

There are no meaningful relationships in ratings assigned to persons in different age groups. The following table shows ratings by age categories:

	60-64	65-69	70-74	75 and over	AGE IN YEARS
Gets along better	35	27	23	39	
About the same	56	52	60	45	RATINGS IN
Does not get along as well	9	21	17	16	PER CENT
	(229)	(176)	(84)	(38)	NO. IN GROUP

This distribution shows that older workers as a group probably are not more difficult to get along with. About a third of these older employees were judged by management to be better than average younger workers in getting along with others, and more than half were said to be as good in their relationships with others. This suggests that there is little basis for the belief by some that workers necessarily get "old and crochety" with the years.

A few managers commented on a lack of tact among certain older workers. Typical of this was the comment, "She's always here and she outsells the rest, but she isn't always tactful with other employees." However, managers reported that most of their older workers were a patient, kindly-disposed group. On this subject, a leading geriatrician, Dr. E. V. Cowdry of Washington University, has concluded, "With age comes perspective and, I firmly believe, also tolerance."

DEPENDABILITY. When it comes to dependability, older people outshine their juniors. The tabulated ratings indicate that more than half of these senior workers were considered more dependable than *average young workers*.

Reported to be more dependable	58%
Reported to be as dependable	38%
Reported to be less dependable	4%

A study of ratings by age categories indicates that dependability is an enduring quality which continues and even improves with age:

	60-64	65-69	70-74	75 and over	AGE IN YEARS
More dependable	61	50	60	76	
As dependable	36	43	38	21	RATINGS IN
Less dependable	3	7	2	3	PER CENT
	(229)	(176)	(84)	(38)	NO. IN GROUP

These ratings suggest that older personnel are remarkably dependable, contrary to the belief of some businessmen who reject older workers "because you can't depend on them." Department managers and supervisors, whose own performance is dependent upon the accomplishments of their subordinates, were fairly unanimous in praising the dependability of older workers. Loyalty was often mentioned synonymously with dependability.

Are older workers more dependable simply because they feel they *must* be in order to hold their positions? Probably not. After discussing this

point with a dozen different managers, it was found to be the consensus that older workers are more dependable than younger workers because of their longer association with the company and the greater stability of their habit patterns.

SALES OR WORK VOLUME. The major criterion in the evaluation of an employee is productivity — not that he is young, that he is old, or that he is somewhere in between. A business organization operates for profit; and unless its employees can produce in terms of sales and work results, the organization will not remain in business very long. In this survey the sales and work productivity of older workers was compared with that of *average younger workers*. The result was as follows:

Reported to have a higher sales or work volume	39%
Reported to have a volume about the same	47%
Reported to have a lower sales or work volume	14%

These figures, which show that eighty-six per cent of the older workers have sales or work production records as good as, or better than, those of younger workers, should be of great interest to retailers who are looking for new sources of personnel or who may be weighing the feasibility of retiring all employees at sixty or sixty-five.

Ratings indicate that high sales and work productivity may continue into the advanced age categories. There is a slight, progressive decline in sales and work volume paralleling the increase in age. However, employees in the oldest category are productive to an extent which is exemplary:

	60-64	65-69	70-74	75 and over	AGE IN YEARS
Higher volume	47	34	31	29	
About the same	44	48	50	50	RATINGS IN
Less volume	9	18	19	21	PER CENT

From these statistics, it is apparent that work productivity may continue at a relatively unimpaired level through the years, provided the individual retains (a) his physical strength, and (b) his motivation to work.

(a) Do elder workers in general retain their physical strength for work into advanced years? The answer is *yes* — for most types of work today. It is true that the retailing positions included in this survey, which form the basis for our conclusions, are not physically demanding and require only an ability to stand for long periods, walk, and perform manipulative operations. But with modern labor-saving devices, few occupations require a greater expenditure of physical strength than that required in such common retailing tasks as clerking, unpacking, wrapping, and light lifting.

(b) Do older workers in general retain their motivation to work? Again, the answer is *yes*. Several attitude surveys conducted among people who are

about to be arbitrarily retired at 65 by their employers indicate that a majority would prefer to continue working.

- **remaining years of service**

How long can an employee continue to render productive service to his employer? Does the work life end at sixty, sixty-five, or seventy? Nearly a third of the older employees included in this survey appear to be capable of working as long as they live.

In order to obtain data on the remaining work life of older personnel, supervisors were asked to evaluate the potentiality of each employee to continue working in his present occupation. Specifically, they were asked how many more years of productive service they thought each employee had left.

Supervisors were asked to use the term *indefinite* in rating employees who gave no indications that suggested a limit on the number of years' service remaining. Of the total number of workers included in the survey, thirty per cent — or nearly one-third — were rated as having an *indefinite* number of years left. These ratings were distributed among the age groups as follows:

Age groups in years	60-64	65-69	70-74	75 and over
Per cent rated indefinite	36	26	18	13

This shows that employees of any age may be free from inadequacies which limit their useful years. While there is an inverse correlation between the number of *indefinite* ratings given and advancing years, it is interesting that *some* employees in each category retain an apparent freedom from weaknesses which impair their productiveness. This supports the argument that retirement should be based upon physiological rather than chronological age.

- **limitations on remaining years**

Supervisors estimated the number of years they expected the balance (seventy per cent) of these employees to be able to work. These estimates ranged from six months to fifteen years, and the average for the group was 5.6 years of service remaining. The number of years of service remaining showed an inverse correlation with advancing age, as the following data show:

Age groups in years	60-64	65-69	70-74	75 and over
Years remaining	7.1	4.6	4.2	3.5

This tabulation indicates that management expects to obtain a considerable amount of additional work from its older employees. For the group as a whole, between five and six years of productive service are still ahead. Note that management estimated that even its oldest workers would be able to continue to render productive service for an average of three and a half more years.

- **age-connected weaknesses**

In evaluating employees on age-connected weaknesses, raters were asked to list only those weaknesses that they regarded as *age-connected*. In other

words, they were not to list traits and personal weaknesses, such as lack of tact or discourtesy, unless they considered them to be the result of advancing age.

Of the total employees surveyed, seventy-six per cent were rated as having no weaknesses, while only twenty-four per cent had apparent weaknesses. The following list shows the kinds of weaknesses observed by supervisors:

General slowing down	Lack of aggressiveness
Impaired eyesight	Irritable
Lack of strength, tires easily	Foot and leg trouble
Impaired hearing	Failing memory
Temperamental	Oversensitiveness
Heart trouble	

It is interesting to observe that only one in four of the employees in this survey had these weaknesses, although such weaknesses are commonly attributed to older people in general. Fully three-fourths of the employees in the group were reported to be free of the inadequacies popularly associated with the later years.

• **summary**

Many conclusions, some of which cannot be supported by the facts, are suggested by these survey results. For example, there is the suggestion that younger people automatically become more productive as they grow older. This inference is erroneous because it fails to consider that the older workers in this survey represent a selective group in several senses: only the healthiest have lived, only those with motivation have continued to work, only those with the best apparent capabilities were selected for employment, and only the fittest have survived dismissal.

It is also suggested that people sixty and over should be selected for employment in preference to younger people. But this inference is erroneous because it overlooks the necessity in retailing to employ younger workers who will be able to give long years of experienced service to the organization and who will be available to replace experienced senior workers who leave the organization.

The survey results, however, appear to support the following conclusions:

1. Older workers in retail stores are considered by their supervisors to be as good as or superior to *average younger workers* with reference to over-all performance, absenteeism, getting along with others, dependability, and work or sales volume.

2. There seems to be no point of age at which retailing employees become unproductive. High sales and work productivity may continue into the eighth decade.

3. Most older workers in retail stores are considered by their supervisors to have several years of productive service remaining.

4. Most older workers in retail stores have no apparent age-connected weaknesses which impair their usefulness as employees.

5. There is a substantial loss in sales and work productivity when retailing organizations require all employees to retire or resign at a certain age, such as sixty-five. Arbitrary retirement and termination, it appears, should be invoked only when an employee's performance is no longer satisfactory.

6. Older people should be considered for employment along with younger people. A well-selected person of sixty or more may become adapted to retailing work and render a dozen or more years of superior service to the employing organization.

Older people in modern society are not only growing in numbers but also are being rated by physicians as physiologically younger than their fathers and grandfathers were at the same age. These advances have come about through rapid progress in controlling infectious diseases and developing labor-saving devices. By 1980, population authorities predict, we shall have nearly twice as many people in our midst over sixty years old as we had at mid-Century; and, according to geriatricians, these older people will be stronger and more capable of sustained work production than their predecessors were at the same age.

Any unfavorable attitudes which we may harbor about the usefulness and capacity of older workers should be re-appraised. Because there are growing numbers of older people in society, we should make intelligent efforts to use their skills. The findings of this study show that we need not be magnanimous about utilizing older people. It appears that well-selected workers sixty years of age and older can hold their own admirably well in retail stores when compared with younger workers.

It is wiser economically to keep able-bodied men and women earning incomes and buying goods than it is to create arbitrary age barriers which force older people into inactivity, despondency, and public dependency.

● **appendix**

SOME OBSERVATIONS ON OLDER WORKERS

"It is a paradox that, whereas medical science has added 20 years to the life expectancy of the American male since 1900—and made him a stronger man at 65, as comparative studies of the decline of back-muscle strength with aging indicate—he has not been able to stay in productive employment as long as his grandfather. While life expectancy after 65 has increased a little over 10% during this century, average length of employment after 65 has decreased 10%." *Harvard Business Review*.

"Major needed additions to manpower supply could be achieved by bringing back into the work force qualified older men and women with previous work experience. Retraining and careful placement will contribute to their maximum utilization. Moreover, the need for additional new workers can be

minimized by encouraging the retention in employment of workers who reach retirement age." *Bulletin No. 1092 of U. S. Department of Labor.*

"If given the choice, most older employees would rather keep on working than retire, according to latest research. A survey by Edwin Shields Hewitt and Associates indicates that 68 percent of industrial workers entitled to maximum retirement benefits prefer to stay on the job. . . . Moreover, industry needs the older workers no less than they, for physiological or financial reasons, need to continue working. The production loss resulting from retiring employees at 65 already approaches four billion a year. Universal compulsory retirement would bring this figure to twelve billion." *Personnel.*

"With reference to learning ability, it has been demonstrated that though it takes older individuals longer to memorize a given paragraph than it does younger persons, their recitations are usually more accurate. Though speed is lost, accuracy is increased. This change in the qualitative nature of memory is most important in relation to employment of older individuals, because there are many positions requiring accuracy, persistence, and endurance in the long, steady grind of competitive existence, rather than the brilliant, gazelle-like speed characteristic of younger persons." Anton J. Carlson, M.D., and Edward J. Stieglitz, M.D., in *The Annals of the American Academy of Political and Social Science.*

"Few people feel that men of sixty, seventy, or eighty are too old to drive cars. As long as a man has the judgment and ability to drive an auto, he has the judgment and ability to operate an industrial machine. It may be that older men are not so fast nor so strong as those in the twenty to thirty year group, but this is more than offset by their experience, their cooler, more mature thinking, and their accuracy. The will to work continues strong in many older people." *Ford Motor Company Bulletin.*

"A survey of employees in 109 manufacturing industries discloses that workers 45 years of age and over have a lower accident rate than younger workers. The highest accident rate was among employees between 40 and 45, and this rate was more than twice as high as for employees in the 70 to 74 year age group. The study also disclosed that absenteeism becomes progressively lower as employees grow older." *Monthly Labor Review.*

"In a study by William Bowers of Ohio State University, performance ratings were secured from supervisors in a large manufacturing organization covering 3,162 men and women from 17 to 76 years of age employed in a wide variety of tasks. Mr. Bowers found that a substantial majority of older workers were rated favorably by supervisors and he concluded that 'since most of these older workers were considered competent on the job and compared favorably with younger workers in the organization, there would seem to be justification for their employment . . . and evidence against arbitrary retirement at 65!'" *Journal of Applied Psychology.*

"For the past year, I have visited, interviewed, and corresponded with . . . officials of thirty-five Cleveland Manufacturing plants . . . almost without exception, the firms visited regarded their older employees very highly. They appreciated the older worker's willingness to work, his loyalty, his backlog of experience, his lower rates of absence and accidents. Many supervisors considered their older workers their most valuable employees. But, at the same time, nearly all could recall unfavorable exceptions." *Report of W. E. Upjohn Institute for Community Research, Kalamazoo, Michigan.*

"A large British firm has set up a small branch employing people over 70. Speed of work in this branch is lower, but workmanship is better and absenteeism less among these older employees than among the firm's younger employees." *Business Week.*

"Mohawk Development Service, an engineering firm in Schenectady, N. Y., is convinced the biggest reserve of technical and professional skills existing today is in the over-65 age group. Mohawk ran into difficulties building up its staff of designing engineers and draftsmen for contract work — mostly for General Electric. So it turned to the over-65 pool, and today almost everyone on the Mohawk payroll, except some clerical help, is between 65 and 77 years old. For Mohawk, the use of oldsters has been highly successful." *Business Week.*

"Pitney-Bowes' personnel director, Joseph Morrow, thinks employee retirement age should be flexible. In line with this philosophy, the company has written into its retirement plan provisions for retaining employees over 65 whose physical condition permits continued employment." *Business Week.*

"Frederick H. Ecker, Honorary Chairman of the Board of the Metropolitan Life Insurance Co., apparently disagrees with the modern trend of thinking that too much work is bad for an executive. At 85, after 69 years with Metropolitan, he still puts in a full five-day week of work. And he thinks that his longevity can be attributed primarily to the fact that he has always kept busy. 'So much leisure is now being sought', he says, 'that the time will come when people will pay for the privilege of working.'" *Office Executive.*

"Her feet may be killing her, but the white-haired woman behind the counter would much rather be there than taking it easy at home. It's even more true of aging salesmen. So psychologist Janet Bower learned from 160 Chicago department-store clerks aged fifty-five to seventy. Almost 90 per cent felt their work meant more to them than just earning a living — that it was 'stimulating, educational, took their minds off things, and made them feel more alive.' Even if they had the means (as many did), only one in three of the veteran saleswomen, and one in six of the salesmen, said they'd want to retire." *Cosmopolitan.*

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