



EMPLOYMENT OF THE OLDER WORKER

Older Workers (1952)

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Older workers

EMPLOYMENT OF THE OLDER WORKER ;
Two Papers and a Bibliography

εbyα

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A WORD OF EXPLANATION

A symposium on "Employment of the Older Worker" was held on September 2, 1951 at the annual meetings of the American Psychological Association in Chicago. The symposium was arranged by Dr. Charles C. Gibbons of the Institute staff. We secured permission from two of the participants to publish their papers in this booklet.

The Institute is an activity of the W. E. Upjohn Unemployment Trustee Corporation which was established in 1932 by the late Dr. W. E. Upjohn for "research into the causes and effects of unemployment." Since its establishment in 1945, the Institute has conducted research on economic, industrial, and community problems related to employment and unemployment. In organizing this symposium and in publishing this booklet, the Institute is guided by a recognition that the proper utilization of older persons is an economic and social problem of growing importance.

Kalamazoo, Michigan
March 13, 1952

HAROLD C. TAYLOR, *Director*
The W. E. Upjohn Institute
for Community Research

EMPLOYMENT OF THE OLDER WORKER: BACKGROUND OF THE ISSUE

By CLARK TIBBITTS, *Chairman*
Committee on Aging and Geriatrics
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Employment of the older worker is being discussed and studied up and down the land and in other lands which are experiencing population and cultural changes similar to our own. This attention is well placed, for employment, financing, and the role of older people are three of the most important features of the aging process.

It is deserved also because of the rapid increase of our older people—34 per cent in the number 60 years of age and over in the last decade.

The average age of our adult population is about 42 years today as against 37 years in 1900. Thus, it is apparent that, if we are to have enough workers at all, we shall have to recognize the capacities of those beyond 45. In addition, there are actually 2 million fewer persons between the ages of 10 years and 24 years than there were in 1940.

Change in our employment habits will not come easily, because there are many complicating factors, because there has been a long-time downward trend in utilization of older people, and because a good deal of prejudice has developed.

Considerations in Employment of Older Workers

I shall not undertake to trace the historical factors in labor force participation because that ground has been about as well worked over as it can be until someone brings new data to bear. Instead, I shall identify the principal considerations or factors that are getting attention at the present time.

Productivity

One of these considerations is the extent to which the productive capacity of older people is needed. It certainly appears to be true that we could not have accomplished the production miracles of the early 1940's without the contributions of the older persons who remained in or returned to the labor force.

A similar situation obtains now. It is estimated that 3.2 million additional workers will have to be engaged in defense production if the established goals are to be met. Some 1.8 million of these will come automatically through plant changeovers and through normal labor force additions. The other 1.4 million will have to be found among older people, among handicapped who can be

rehabilitated, and among women. It is my belief that older men and women alone, some of whom would require rehabilitation and training, are willing and ready to fill these jobs. It is not necessary to draw young women with children into the labor force.

The major question is what happens after the period of defense production. Will there be a smaller demand for commodities and services that will be reflected in discharges of older workers? There are some who answer "No" by pointing to the work about us that needs doing and the capacity to consume that resides in our own growing population and in countries with low standards of living. It has been stated, for example, that plant expansion for mobilization will result in no surplus of facilities when we return to supplying these needs. The fact remains, however, that our retirement policies grew, in large measure, out of an apparent plethora of workers in the midst of a period of underconsumption that was actually dangerous to health and welfare.

Financing Idleness

A related question is whether or not we can support a rapidly growing proportion of older people by means of pensions and grants. Again, there are two opinions. The adherents of one opinion point out that the ratio of dependents to workers has declined with the falling birth rate and that our productive capacity is practically unlimited, at least as far as providing for our own population. They point out, too, that real incomes have risen tremendously while hours of work and utilization of older people have declined. This group argues that the principal question is how we shall distribute the goods and services we are capable of creating.

The other view, and I suspect that of the majority, is that we cannot afford a constantly increasing population of dependent older people, and that the best way to support them is through income from wages. This group has behind it, at any rate, the force of opinion that is holding down the amount of pensions and grants at the present time and even discouraging those who ask for public assistance.

Regardless of the arguments, not many of our older people are now living at comfortable levels. Few pensions or annuities and fewer public assistance payments enable the older individual or couple to live the full, rounded life we are urging upon them. Most, indeed, are forced to live under circumstances that breed isolation, dissatisfaction, physical and mental deterioration.

The Individual's Wish in the Matter

The third factor that may help to shape final policy is whether or not the older person wants to work. As I have indicated, the majority have no choice but to seek work if they are to try to live in health and comfort. Havighurst has

identified several other reasons for remaining at work, including the moral value, prestige, opportunity for social participation, and the intrinsic reward. Kleemeier has found greater satisfaction among employed than among non-employed residents of an old age home. For some, on the other hand, work is an activity to be avoided. The meaning of work is a useful field for investigation.

The present situation is that about a quarter of our older people are at work. The proportion of older women employed is small (9 percent) but increasing. The proportion of older men who resist retirement and who seek other work in retirement appears to be large.

Conclusion

The conclusion to these considerations must be that we are in a state of considerable uncertainty as to whether or not gainful employment should be provided for older people—as a method of income maintenance, as a source of essential manpower, and as a way of life. We are reconsidering the policy adopted less than a generation ago. We are at the point at which we may adopt a definition of behavior for the older years that will have far-reaching implications for the whole population.

How Can Continuing Employment Be Provided?

If we are to consider further employment for older people, and there is a good deal of evidence that we are, for the time being at least, there are several areas that require additional knowledge and action. I shall try, in a few words, to identify these.

Employability

Basic to the whole question, of course, is the nature of the aging process and what older people are capable of doing. Without much in the way of precise data, people point out: that 3.5 million older persons are employed, hence they must be capable; older people acquitted themselves with distinction during the last war; modern production tends to involve lighter and lighter tasks suited to aging individuals; and deterioration of capacities is much slower than we have assumed. While there is doubtless much truth in all of these statements, there is a great deal of variation among aging people, and what we need more than anything else are facts—facts about the nature of tasks to be performed and about human capacities including the capacity for learning new tasks.

Over the years there has been some research on job requirements, although those who use the data say that the data are not sufficiently detailed. In this country, there has been one small and superficial study of job performance. Welford in England has been doing some precise work on employability of

older workers, getting into fundamental problems of "perception and interpretation of incoming sense-data and the building of co-ordinated organized actions . . . (involving) inter-play between 'receptor' and 'effector' processes."¹ Among the numerous researches in aging that have been undertaken in this country during the past year or so, not more than two or three have been reported in this area. It is a large field and a challenge to the physiological and industrial psychologist.

Attitudes

Closely related to this matter is that of attitudes of employers and the public toward employment of older people. It is difficult to say how prejudice was built up but there is no denying that it exists. Want ads prefer younger workers, a majority of hiring officials repeat the traditional stereotypes, including the one that the public prefers to meet young people. Here is a good field of investigation for the social psychologist.

Selective Placement

Continuing employment of older people will require selective placement. We know that some capacities do decline with age in most people so that there may be a narrower range of occupations open to them. Psychologists are well aware that matching people and jobs is efficient at any age; it is perhaps more so in the older years.

The implications are for vocational counseling, selective placement, and training of older persons who are hired or transferred to new jobs; hence a role for the clinical psychologist and the industrial physician.

Effect of Financial Security Programs

Another factor in employment is the limiting effect of programs that have been devised to promote the financial security of the worker—seniority rights, wage floors and wage agreements, compensation for accident and disease, life insurance, and retirement pensions. In one way or another and in varying degrees, all of these affect the chances of new employment for the older man and woman. This is one area in which a good deal of research is under way.

Administrative Factors

Aside from those already mentioned, the principal arguments against continuing employment for older workers already on the job are (1) difficulty of administering a differential retirement program based on capacity to perform,

¹The Nuffield Foundation. *Report for the Year Ending 31 March 1951*. Oxford: The Oxford University Press, 1951, p. 76.

(2) need to provide opportunities for promotion of younger workers, and (3) the problem of getting older workers to accept lower status jobs.

The question of opening up the ladder is a part of the larger question of how many jobs there are. The question of selection for retirement turns largely on our ability to measure performance, as outlined by George S. Johnson in the July 1951 *Journal of Gerontology*.² This, together with the matter of accepting lower paying work, constitutes a real challenge to psychological and medical research.

Health Preservation and Rehabilitation

A final factor in employment of older people is that of preserving health and capacity and of restoring those who become disabled through accident, disease, or infirmity. One insurance company executive has stated that employability of older workers can be vastly improved through extension of safety programs, medical services, psychological guidance, and job appraisals in places of work.³ Medical and public health people, educators, and rehabilitation workers are beginning to recognize the need for geriatric counseling centers; health education for the later years; detection of early disease symptoms; diets, rest, and activities suited to the aging organism; and the possibilities of restoring the handicapped to functional status.

Conclusion

It is obvious from this review of questions that have been raised by people of all kinds all over the country that further utilization of older people in productive roles is a complex matter and that the achievement of this goal will involve much scientific knowledge and many professional services that can be supplied, in large part, by psychologists.

Preretirement Programs

As a final consideration I wish to mention preparation for retirement. Even if the period of employment is extended most workers will leave their jobs at some time. Retirement represents a marked change in the way of life. There is some evidence that those who anticipate and prepare for it make better adjustments.

Some establishments and some communities are experimenting with individual and group counseling and with formal courses covering the range of

²Johnson, George S. "Is a Compulsory Retirement Age Ever Justified?" *Journal of Gerontology*, 6 (July, 1951), 263-271.

³Olson, Carl T. "Geriatrics—Problems with the Aged in Industry," *Industrial Medicine and Surgery*, 20 (May, 1951), p. 208.

later life situations that are likely to represent problem areas. Relatively little is known yet about effective content and methods of presentation. In my judgment, too many of the efforts talk down to the retiree—probably a result of our lack of knowledge of older people and of factors in adjustment.

A specific question that may be raised is whether these programs or services should be offered by employers or by the community. There appear to be two arguments for placing responsibility on the community. One is that retirees leave the establishment and find their activities in the community. Hence, it would seem desirable to get them into community-oriented programs. The other point is that most establishments are far too small to offer preparatory services. Thus, the community will be involved, in any event. On the other side are examples of programs that appear to be highly successful. One of them has just been described by the Prudential Insurance Company.⁴

Summary

In relatively few words I have tried to present the main issues surrounding the current question of employing older workers. The underlying considerations are: How shall the later years be financed? Do we need older workers? What do older people wish to do with their time?

Surrounding further utilization of older adults are questions of employability, attitudes, selective placement techniques, existing worker security programs, administration of retirement systems, and preservation and restoration of function.

Preparation for retirement is a corollary matter.

⁴Anonymous. "Making Them the Best Years," *The Prudential Home Office News*, (July, 1951), p. 3.

EMPLOYMENT OF THE OLDER WORKER: EXPERIENCE OF EMPLOYERS IN THE CLEVELAND AREA

By Arthur J. Noetzel, Jr.

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The American poet, Robert Frost, wrote these gray lines about an old man on a winter's night:

"What kept him from remembering the need
That brought him to that creaking room was age.
He stood with barrels round him—at a loss."

The problem of utilizing the older person in industry is to keep him from being "at a loss" to himself, to the company that employs him, and to the national economy.

This problem is created by the long-run trend toward an older labor force and by the long-term decline in the employment of the elderly, a situation which creates a pool of unused or poorly utilized manpower. This under-utilization of resources is a challenge to sound management. If the tendency toward a narrowing field of employment for those in the "mature years" is not checked, the working population in future times will have to shoulder a progressively heavier economic burden for pensions and other forms of old-age assistance. This condition would inevitably cut into the living standards we might otherwise attain, and would tend to limit the amount available for other socio-economic benefits.

The Survey

For the past year, I have visited, interviewed, and corresponded with some personnel managers in Cleveland and Northern Ohio. This preliminary and tentative report of my findings is based upon interviews with officials of thirty-five Cleveland manufacturing plants, employing between 50 and 2,500 persons. The purpose of the survey was to find out what they are doing and thinking about the problem of utilizing the older worker. These firms constituted a selected rather than a random sample. As I am broadly stating my findings, it must be remembered that each firm faced somewhat different difficulties, and none found solutions in an identical fashion.

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 super-

visors considered their older workers their most valuable employees. But, at the same time, nearly all could recall unfavorable exceptions.

The differences between the advantages and limitations of utilizing older workers in manufacturing depend upon different concepts of an older worker. At times "older worker" was defined in chronological terms, but more frequently the term referred to a person with declining abilities, one who was unable to perform satisfactorily the work assigned to him. Often other definitions were expressed or implied, and these differed according to whether the situation was the selection or the retention of an older worker.

The views of the personnel officials in Greater Cleveland are that the difficulties of utilizing the older workers are found principally in the processes of selection, placement, and work re-assignment of semiskilled workers.

Selection

While employers may feel a deep sense of obligation to their older, long-service employees, they were sometimes reluctant to favor the hiring of other older employees. This hesitancy to employ older persons was not, however, expressed by the general imposition of a maximum hiring-age. Eleven firms admitted hiring-age limitations, but nine of these asserted that they had made exceptions during the past years and that their restrictions applied to specific classes of workers, such as:

1. Unskilled machine operators
2. Those applying for work in departments involving strenuous exertion
3. Women factory workers
4. Salesmen of industrial goods

Another way of reporting this matter is to say that firms were generally willing to employ skilled male workers or male workers who had "adequate" experience in other firms in their industry.

In selection, most personnel managers have encountered the well-established fact that as persons grow older their individual differences become greater. Thus, the problems of evaluating the work ability of older persons is less simple, is less adaptable to routine procedure, and requires more time and consideration. Most of the firms which feel that they have been successful in hiring older semiskilled workers stress the importance of a thorough and planned interview as a key to proper evaluation of an applicant's fitness. The interview should bring forth pertinent information concerning the applicant's physical and mental condition, his previous work, skills, and knowledge of various jobs. Many feel that the great danger is in hiring an older person who is a marginal worker. They believe it very important, therefore, to determine whether the ap-

plicant has been a drifter, what his economic and social status is, and whether he will fit in well with the present work force.

To the foregoing generalization, I should like to add the following marginal notes. Two firms expressed the opinion that, other factors being approximately equal, they would prefer to hire an employee pensioned by another company rather than a slightly younger man. The smaller firms seem to place greater stress on the social homogeneity of their work forces than do the larger companies. Social homogeneity seems to be an important factor in the employment of older women for clerical and office work. One company which believes it has successfully integrated older women into its work force requires three interviews before a decision on hiring is made. Another point frequently stressed by personnel managers is that older applicants must be frankly and honestly told their position under the pension plan.

In speaking with industrial physicians who are medical consultants to some of the smaller manufacturing companies in Cleveland, I found that they thought one of the difficulties of selection centered on the report of the applicant's medical examination. Too frequently, the doctors believe, these reports are viewed merely as a precaution against accident compensation claims, rather than as an aid in evaluating work capacity. At times, personnel officers seem to reject any applicant whose report shows a medical finding of hernia or cardiac condition. Such hasty action works against full utilization of the older members of the labor force. These industrial physicians find that they can seldom help in this regard because, frequently in times of active hiring, they are not informed as to the type of work or the physical environment of the job.

The various tests, which might be used as guides in the selection of new employees, were not generally favored. Personnel officials were not satisfied with the reliability or validity of the usual tests when applied to the upper-age groups. Moreover, several firms reported that older applicants refused to take the tests.

Placement

In placement, in matching the man with a job, individual differences again create difficulties among older semiskilled workers. Three common approaches to the proper placement of older workers which some firms have found useful are:

1. A survey of jobs which can adequately be performed by older persons
2. An increased probationary period for older persons
3. The placing of older persons hired for semiskilled work on utility jobs

The advantages obtained from these approaches are limited by the nature and numerical distribution of the jobs, the collective bargaining contract, and the quality of the job analysis.

Once older workers have been reasonably evaluated and placed on suitable jobs, the center of difficulties may shift to the departmental foremen. Employment managers stated that one reason for their reluctance to hire older persons is the unfavorable attitude of some production foremen. Some foremen seem to lack skill in handling new but elderly workers. Older workers sometimes become the excuse for lower levels of production. To meet these difficulties, firms have tried the following techniques:

1. Talks to foremen concerning characteristics of older workers and their place in the labor force by the industrial physician and the personnel manager
2. Charts prepared to show the age distribution of each department (this technique tends to prevent any one foreman from becoming the head of an "old man's department")
3. Instructing foremen not to assign rush-order jobs to older workers
4. Assigning a portion of the wage of an older worker who is not fully productive to an indirect-expense account

A commonly reported difficulty in work assignment is that of the older worker's sensitivity and possessiveness about his job. Sometimes this characteristic causes particularly trying problems in a small firm. Several companies employing fewer than 300 workers reported that this factor handicapped them in training understudies for skilled jobs. Some older workers believe that they have held their jobs long enough and know enough about them not to be required to take advice or direction. Some may hold back when it is necessary to assign them to new jobs or into new situations, measures which to them imply uncertainty, a lack of usefulness, and a lowering of self-esteem. Those who have experienced this personnel problem have not found general, satisfactory solutions; their advice to others is to proceed cautiously. Incidentally, employers generally believe that this characteristic of job-possessiveness is more common among older women workers than among older male employees.

Re-Assignment of Work

When the job performance of an older worker declines, it is necessary to answer these questions: How much has it declined? In what way has it changed? How can the worker's handicap be offset? The executives who cooperated with this survey reported that their efforts to solve the problem of workers with falling productivity usually have consisted of action taken to meet each separate situation. Formal rules or fixed procedures in dealing with problem cases are infrequent. Unless the employee is subject to an extended disability, the usual practice is to retain him by a re-assignment of work. The discovery of the prob-

lem cases and the request for the worker's transfer are made by one or more of the following: the employee himself, his immediate supervisor, the industrial physician, or the personnel officer. The executives are in general agreement that the problems are more easily handled when the request for a transfer comes from the employee or from the medical department. Re-assignment of older workers is generally made to existing jobs. Most of these transfers involve downgrading. The rate generally paid the transferred employee is the rate of the new job. Those who feel that they have made successful and happy transfers of older workers to new jobs believe three factors are important to consider. First, there are two different employee reactions to the situation: one group of older employees is more concerned with remaining on the payroll and having the status of workers than it is with the amount of income earned; the other group is very reluctant to accept any reduction in wages. Secondly, the successful adjustment of an older worker to new assignments requires time and sound counselling—counselling to preserve his feeling of usefulness and self-respect and counselling in reference to his concept of his value as a producer. Thirdly, the re-assignments should be gradual and utilize as much of his former skills and abilities as is possible.

Those firms which have periodic medical checkups of their older employees believe that they are able to discern promptly the first signs of productive decline. Yet it is interesting to note that only two firms reported that this disclosure was an objective of theirs when the medical checkups were started.

Special job engineering is seldom used to compensate for the worker's declining abilities. The few firms which have done such work did not begin it for this purpose. They started special job engineering to accommodate the veterans of World War II who returned with handicaps, and now have extended such efforts to some of their older workers.

Most of the firms which feel that they can easily transfer older workers to lighter production jobs say that three conditions often assist them:

1. The installation of conveyors, mechanical lifts, pneumatic chucks, and similar equipment
2. The combination of older and younger men in work teams
3. The expansion of production, which creates additional jobs

Planning for Retirement

If the concept of utilization implies the prevention of a man's being "at a loss" to himself, then the last stage of the process is preparing the aging worker for retirement. In this sector of personnel administration, I find most firms in a state of flux. During the last months of 1950, many firms were enthusiastically

pursuing plans for the establishment of a program of pre-retirement counselling. Now I find a slackening of interest in the Cleveland area. The reasons for this change of attitude seem to be:

1. The need for all available manpower
2. The uncertainty of where to begin and the realization that such programs cannot be hastily established, if they are to be sound
3. Doubt as to the extent of the firm's responsibility in this new field of personnel administration

Firms which have seriously considered the problem see the need for counselling in three areas: financial, physical, and emotional. But they ask such questions as these: What should be the detailed content of such a program? How long should it take? Will the employees accept it? Will they think that we are meddling in private matters? In spite of these questions and other doubts, the majority of the companies feel some responsibility toward helping an employee adjust to retirement; they do not want him, after leaving his job and co-workers, to feel that (quoting Frost again) "All out of doors looked darkly in at him."

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