**Workshop: 7th December 2017, Newcastle University – Union Reps**

1. **Summary**

* Names and employing organisations of the reps:

Michael (IT Department, Newcastle Building Society), Alan (ComputerShare CLS - a global company), Cory (A union rep in Barclays Bank dealing mainly with employee disciplinaries), Steve (Barclays Bank), Paul (No details of employing organisation – a rep for three years). Plus Matt Flynn and Chris Ball

Attendees had all been contacted by their union official for the Financial and Legal Services Sector and sent details of the workshop in advance.

* Over-view:

Each member of the group explained a little of their own work situation and the position of the union in the organisation in which they were employed. Some discussion turned around the presence or otherwise of older employees and the balance between young and older people in the workplaces concerned, what work meant to the older worker in contrast with the younger worker, how older workers were treated, how management regarded them and valued them or otherwise. The discussion was relatively unstructured but there was *considerable enthusiasm for the subject and ideas sparked off one another’s contributions.*

* Comments and assessment:

Excellent and very positive workshop. Real depth of interest and insights. Great enthusiasm for doing more work in this field.

**2. Context**

A varied picture with some reps having experienced redundancies. No striking history of disputes, reasonable relations with management appeared to exist in all organisations. All reps were part of Unite’s Financial and Legal services sector.

A broad spectrum of young and old in all employers. No major disputes or redundancies.

**3. Orientations towards Active Ageing**

All were positively inclined but had detailed and unique insights to share (See appendix 1). Some of the reps had been involved in individual cases or had observations on the ways individuals were treated. Particular points made in discussion included

* Older workers were seen as more expensive but were more stable
* While registered disabled people could expect allowance to be made for progressive conditions that limited their output, people who slowed down because of their age could not expect concessions from the employer.
* Older workers who were slowing down were likely to be put on a “capability procedure”, that is they would be warned that they needed to improve and then monitored by the employer.
* Older workers who needed adjustments to their work situations didn’t generally ask for them. Reps felt they should be able to ask for concessions.
* Target driven cultures were particularly hard on anyone slowing down.
* One rep in a highly sensitive area of her company, the Fraud Department, had noticed older workers who did not seem to learn quickly enough in their initial training. They had been reluctant to ask for extra time to learn the procedures and as a result had been identified as “problems” and put on an “at risk” register. They should have been given more time to improve, particularly as they were very good in other ways (e.g. on the telephone with customers).

**4. Attitudes on component ideas once shared**

There could have been more discussion on component ideas of active ageing but reps seemed interested and keen to learn more about the ideas that could help them better respond to the active ageing agenda.

Responses were mostly driven by the experiences of reps rather than curiosity about sophisticated new approaches to manage the ageing workforce. The kinds of complaints and issues raised were as follows:

* Intensity of work – it should be possible to request and receive concessions.
* Design of work – the same point as above.
* Managerial approaches – managers seemed more interested in figures today than people – this was not appreciated
* People used to get credit for experience – this seemed no longer to be the case. Promotions or new jobs were not given on the basis of one’s performance in the job but on the basis of an interview. This often meant that a more junior person was appointed to a managerial role, managing an older worker who in fact had considerably more experience.
* Skills training to maintain employability – it was felt that the union should insist or provide skills training to help older workers who were un-used to the process of applying for jobs. It was suggested that this could be an opportunity for the union to provide services to members or for the company to take a bold initiative in support of its older workforce many of whom felt marginalised because they were overlooked for promotion.
* Attitudes to work – There was an interesting discussion showing awareness of the conflicting and differing attitudes to work among members of the union. One rep was worried that they may not ever have an opportunity to retire. On the other hand it was acknowledged that people needed to work to gain respect, have friends and be economically secure.

Reps did come up with ideas – the idea of employability and/or skills training for older workers, perhaps provided by the union – was one such idea.

**5. Specific aspects of working life**

The arduousness of working in a target driven culture, working under pressure, working fast. Cory and some other reps attested to the fact that once retired many people were unhappy and were willing to come back to work if an opening existed. Mental ill-health was highlighted by one rep who was a “Mental Health First Aider” in his company. Examples of things the union could do to support mental health were given, talking about well-being, activities of a health and exercise nature – boxing, yoga, walking etc.

**6. Energy / Enthusiasm to go further**

Considerable interest in doing something more. Reps left feeling enthusiastic. Scope for a training course or tools would seem good. One rep commented on how valuable it would be to have conversations with employer on retirement. He suggested this could happen at intervals throughout working life.

Useful and interesting discussions about whether younger workers felt they were being crowded out by older workers (no feelings of this kind were reported). Intergenerational issues and the place of learning all came up. Strong feelings that employers needed to make sure that all staff realised they would be backed and employer would invest in them.

**7. Ideas and tools**

Feelings that *information* was the most important thing and that this could be provided in different formats.

* Suggestion for a survey giving examples of policies would be a good thing – well received suggestion – and that this would trigger bargaining and campaigning activity.
* Suggestion that the union should appoint a National Officer for Older Workers
* Criticisms of companies – they were OK at dealing with issues of direct discrimination against older workers but not so much with indirect discrimination.
* Questions of how the unions could promote social change around workforce ageing
* Better understanding of career development issues was needed
* The union needs to be able to hold employers down on rights and working conditions – regarding retirement or “de-retirement” etc, needed to be able to gather the views of members on different policies – scope for an extended piece of work beyond the project here. Feeling that the union should be in a position to help people at the cross roads to take good decisions
* Career development - Strong feeling that individuals needed independent sources of advice on their careers.
* Existing classic reps surveys could be adapted to include questions around support for active ageing.

**8. Research protocol**

At the end of the workshop discussion, participants were asked their views on the research questions and recommendations going forward. Participants understood the questions and felt that they were able to answer them in an informed way. Discussion was carried out in a semi-structured way in order to keep the conversation continuing and avoiding repetition. One participant noted said that being told of the research objectives at the start helped in preparing their answers. This workshop went longer than initially anticipated (3+ hours) as participants were interested in the topic and were able to give some flexibility. Having the broad questions at the start can 1) ensure that participants who are not able to stay for the full time are able to make a contribution; and 2) identify most relevant ‘take aways’ for the workshop are articulated. Participants also extended invitation to their counterparts to take part in employer discussion groups.

**Chris Ball**

22nd February 2018

(Taken from notes prepared on 8th December 2017)

**Appendix 1**

**Comments from reps on detailed situation in own company.**

The following points were made in discussion

Alan gave the example of his own workplace where there were people who had continued working longer because of their family circumstances and the possibility of continuing to work part time or flexibly. He had one colleague who was carrying on working although she was quite old and could easily be retired but she seemed happy to carry on working, in part for financial reasons but also because she was single and alone and (he felt) gained from having a work role and therefore a role in society as well as the income that resulted from it. He commented that many of the older people had acquired skills and were therefore useful to the company. No undue pressure had been put on people to retire because of their age. There had been no redundancies lately and many people who had been in the organisation for some time had been allowed to continue working beyond “retirement age.” Older workers were seen as more stable but also they were probably more expensive. On the other hand they had more experience and the company seemed willing to accept the extra costs of employing them (at least at the moment) having regard to the benefits they brought.

Steve had worked with a number of different teams in a call centre environment, including older women. There was a strict regime of measurement of performance and he noticed that it was not uncommon that these older women encountered difficulty in meeting their performance targets. As a result they were sometimes put under pressure including having to defend themselves in “capability procedure” process. Steve contrasted this situation with the position of a person with a disability who would be able to claim the right to a “reasonable adjustment” of the work and working methods, including making some allowances for their inability to work at the same pace as other able-bodied workers. He felt that the physical slowing down of older workers should be seen in a similarly understanding way. It was a fast moving and fast changing environment and many people, including older workers had difficulty coping, but there were no concessions made to recognise the changes that occurred as a natural part of life in the human body. He believed the company should have arrangements so that individuals could put their hands up and ask for such concessions, though in his company (Barclays) the disciplinary procedure was the predictable route.

Steve could see that customers were sometimes reassured hearing an older voice at the end of the telephone and he felt that there should be recognition of the business advantages older workers brought instead of simply counting their calls and monitoring their performance in the mechanistic ways adopted. (This view as endorsed by other contributors – ‘Whether you are 16 or 75 you are expected to hit the targets,’ was one way it was put.)

Corrie explained that she was originally ‘on the front line’ (she was now in a different role) where she had seen older men being brought into the organisation but not lasting long as they were working in areas where there was a high sensitivity to security and risk. Because of errors made by these older men they had been picked up by the company as ‘risky’ and their working lives had been blighted as a result. The problem however had been avoidable if the company had adopted a different approach to training and instead of throwing these older workers into the front line before they were ready, the should have insisted on a longer and more careful training programme so that they were completely ready to do the work being expected of them.

Michael (Newcastle Building Society) described the process that the company had taken to benchmark jobs, pay grades and pay in his organisation using Towers Watson Perrin approaches. Whilst this had been a useful way of ironing out inconsistencies in pay there was more clarity about the wage-work bargain and there may now be less tolerance of below par performance. This may not be so good for the older worker who may be a bit slower in the job.