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## Strategies for Managing an Aging Workforce

Marie F. Jones

Demographic trends show that the population of librarians in the U.S. is rapidly aging. This paper examines the ways that library managers can make workplaces more attractive to older librarians in order to encourage them to remain in the workforce beyond retirement age. The article dispels some negative stereotypes of "the older worker" and shows the advantages of retaining individuals with experience and maturity. It also addresses organizational climate, management, and training issues related to older workers.

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The recent report on census statistics and aging librarians published in the March 2002 issue of *American Libraries* (Lynch), indicates that of the 87,409 librarians currently in this country, 18,469 will reach age 65 in the years 2010-2014. Yet that five-year range is only the peak in a chart that rises rapidly from the years 1990-1994 when about 5% of librarians will retire, up to the years 2010-2014, in which over 20% of the total current librarian population will retire. In fact, the report indicates that over 50% of all librarians working today will reach age 65 by the year 2014.

### Part of a National Trend

This demographic trend is part of a larger one across the U.S., because of the large Boomer population retiring in the coming years. As the Baby Boomers' age and life expectancy increases, by 2020 almost 20% of the U.S. population will be over 65 (Stanley, 2001). Because of these retirement trends, the writers in the human resources literature have begun to examine new ways of looking at older workers. Only a few library authors (e.g., Flowers, 1990; Arthur, 1998) have explored library management issues in light of the aging population. With the huge number of librarians reaching age 65 in the coming years, leaders in our profession would do well to begin to re-examine how older workers may be supported in our own work settings. In *New Passages* (1995), Sheehy points out that Boomers, as they near and pass retirement age, are going to have a different relationship with work than previous generations (p. 374). The AARP Work and Career Study (Montenegro, Fisher & Remez, 2002) found that

69% of workers interviewed plan to work after age 65 and the Age Discrimination in Employment Act means that most professions will no longer be able to force people to retire. So perhaps the aging of professional librarians is less of a crisis than we might think, as long as we build organizations that support workers beyond the traditional retirement age.

Before a leader begins to build a program for retaining and recruiting older individuals, it is important that all members of the organization realize that older workers are not less productive than their younger counterparts. Ability differs across all age groups, and experience, loyalty, and a strong work ethic actually tip the balance in favor of older employees. It is also important to recognize that there is great diversity among employees in any age group; stereotyping "older workers" benefits no one. The largest barrier to the effective employment of older workers is misinformation about these workers in the workplace. We've worked hard to eliminate sexism and racism in our workplaces, but have we explored issues of ageism? And, as a practical matter, it is bad practice to marginalize our most experienced and mature professionals merely on the basis of age.

### Productivity of Older Workers

The largest barriers to the employment of older workers are myths about productivity and cost. Older workers have similar, if not better, rates of job performance, absenteeism and turnover as younger workers, and they do not cost more to employ. Engle, Miguel, Steelman, and McDaniel (1994) reported results of a meta-analysis that examined the relationships between age and work values. They reported a positive relationship between age and "protestant work ethic". Similarly, meta-analyses of the age and work performance literature have reported that there is little difference in work performance in relation to age (McEvoy & Cascio, 1989;

Waldman & Avolio, 1986). This is particularly true in professional occupations like librarianship. Waldman and Avolio (1996) reported evidence to support that the relationship between age and work performance varies depending on whether the job was a professional versus a nonprofessional occupation, and Sparrow and Davies (1988) indicated that the strength of the relationship between age and quality of job performance varied depending on level of job complexity. Specifically, peak performance occurred later on jobs requiring greater levels of job complexity, especially those typically associated with knowledge-based professions. Since librarianship is one of these complex, knowledge-based professions, it appears that our work is of the kind that actually improves with age.

Rates of turnover are also low among older workers. AARP (1995) states that workers between the ages of 50 and 60 stay on the job an average of 15 years, and their attendance is as good or better than other groups. In another meta-analysis, Healey, Lehman, and McDaniel (1994) reported that age was negatively correlated with turnover. These results supported earlier findings reported by Cotton and Tuttle (1986) and Rhodes (1983). Despite a higher rate of chronic illnesses among older people, workers aged 55 and over have rates of absenteeism similar to their younger counterparts. They are only slightly more likely than younger workers to miss work for illness, but they are less apt to be absent for other reasons, such as family obligations (Rix, 2001).

Work-related injuries are also lower for older workers. While older workers take longer to heal after job-related accidents, they have disproportionately fewer accidents than their younger counterparts. In 1998 they sustained just under 9% of all occupational injuries or illnesses requiring time away from work (Rix, 2001).

So if all of this is true, and older workers are a benefit and not a hindrance in the workplace, then we must educate ourselves and our coworkers to acknowledge and dispel the myths that surround age. This could be done in a discussion group or classroom setting, while other libraries might go deeper and work to change the entire organizational culture to be friendly to older workers.

### Creating the Age-Friendly Work Environment

But what is it that makes a workplace age-friendly? Montenegro, Fisher, and Remez (2002) found that workers “want to work on different terms than may have defined their earlier careers, with more flexibility and autonomy” (p.2). They also want respect, training, and benefits. AARP’s annual “Best Companies For Older Workers” award is based on six key categories: corporate culture, recruiting, wages/salaries, continued opportunity, benefits, and retirement (Pouncey, 2002). Librarians can address each of these factors in the effort to make our workplaces attractive to older workers.

Organizations must be friendly to workers of all ages, and must be flexible to fit their needs. A 1999 European study by Walker and Taylor listed four main “Guidelines for Good Practice” gleaned from case studies of organizations successful in retaining older workers: 1) Backing from senior management; 2) A supportive HR environment; 3) Commitment from the aging workers involved; and 4) Careful and flexible policies. With these support mechanisms in place, specific plans may be implemented to make all parts of the organization friendly to older employees.

One way to begin is to acknowledge the important contributions of older employees. For example, an organization might make the retirement day of employees memorable, showing appreciation for the work of many years. Ritual and ceremony is an important part of commemorating life passages, and the workplace should support such ceremonies. Long before the retirement day, however, leaders need to be sure that older workers know that their work is important to the organization.

Mentoring relationships demonstrate to older workers that their experience is valued. Some programs match retired and new employees; others connect senior and junior staff. Yet Fandray (2000) points out that managers must be especially sensitive to issues of intergenerational conflict when mentoring systems are in place. Older workers may feel threatened by the ideas advanced by younger colleagues; younger people may feel patronized by their seniors. Fandray goes on to say that mentoring relationships like these work best in environments where teamwork and partnership

are already models that are in place. Then, the culture emphasizes the working relationship rather than the age difference.

Setting the tone in the organizational culture also encourages able elders to continue in their jobs. Take, for example, the case of Zabin Industries in Southern California, where cofounder Robbie Eisenberg was recognized last year as the oldest worker in America at age 102. That company doesn't worry at all about losing their experienced workforce to retirement (Albrecht, 2001).

### Solutions to Staff Shortages?

The library literature has emphasized recruitment of new librarians into the field to fill those positions vacated by retiring librarians, yet there has been little training available for these young librarians on how to manage older staffers. Management of older staff relies on collaborative types of management. Older workers are likely to feel stressed, as all of us are, by the rapid changes in our profession. Effective change management requires extensive communication about the nature and extent of change, and collaboration regarding the implementation of these changes. Articles such as, "Seven tips for managing people older than you" (1997) can offer some insight into dealing with the generational gaps common in many workplaces. The article focuses on well-known management techniques and reminds us to "[c]onsider older workers your secret weapon" (p. 14) and to focus on mutual respect and teamwork. If older librarians are our "secret weapon," then the library profession in the next ten years will put the Department of Defense to shame.

On a more serious note, though, if we are to effectively use the expertise of older workers, we must create flexible options for work within our libraries. Phased retirement, part-time employment, on-call temporary employment, job sharing, and consulting arrangements all offer flexible options that utilize the expertise of older workers without locking them into an all-or-nothing work schedule. Think of the benefits to a library to have a pool of experienced librarians to call on when a regular staff member is out on sick leave or sabbatical, or when you are in the process of hiring a new professional. And wouldn't a part-time professional librarian with 30 or 40 years of experience be better for staffing the reference desk than a graduate

assistant or part-time paraprofessional? Job sharing is fairly uncommon in libraries, but it might be a way to keep two able people in the workforce whose circumstances or needs preclude full-time work. Using retired workers in part-time or job-sharing positions also allows for informal mentoring opportunities in which new librarians learn from their more experienced colleagues. Hiring retired librarians as consultants also draws on their vast store of knowledge, while allowing them control over their own schedules.

Older workers might also want flexibility within full-time jobs, through job redesign, job transfer, telecommuting or working from alternative sites, or retraining (Tracy, 1996). Libraries are often very traditional in their approach to worksites, but the Internet offers an opportunity for work flexibility that would not otherwise be possible. Catalogers could easily catalog anywhere, if software were set up for such work. For example, laptops could be configured with the same software as a cataloger's desktop for use at home. Of course, cataloging electronic materials or revising records already in the catalog would be easier than carrying cartloads of books off-site, but the idea is nonetheless possible. Reference librarians could also work off-site, staffing live online reference/chat services that could be run from any online computer. Analysis of my own library's live reference service (Campbell, Jones, & Shuttle, 2003) indicates that all of the questions that have come through our service in the past year were answered by online sources, or were directional questions for the library's online collections. The few questions that might come through that cannot be answered online could be referred back to the main library.

Administrative work could also be completed off-site. I personally manage branch libraries, but my own office is located on our main campus. I could just as easily work from my home or from another state, as long as I returned for scheduled meetings and made periodic site visits, as I do now. For librarians who work on Web pages or instructional materials, working outside the office might actually be beneficial to the quality of work. How many times each day are you interrupted in your office? It's much easier to program or design materials without the everyday interruptions of a busy library.

Flexibility must be integrated holistically into the organization or individuals may think that they

are being pushed out. Workers over age 65 may be sensitive to any effort to reduce their workload. Acknowledging that individual employees of any age might need adjustments in workload based on their personal situation might help to alleviate some of the stress for an older employee. It is vital that these employees know that the organization values the individual's contribution and experience, and that workload is not the main factor in the value placed on their work.

Procedures should also be put in place to use the expertise of older workers after retirement, even when flexible retirement options are not in place. Organizations should keep the lines of communication open in case able seniors wish to return to the work force in some capacity. Stanley (2001) suggests building a list of skills, knowledge, and formal education of retirees before they retire so that the list can later be used to contact retirees to meet organizational needs, and building a database of retirees who would like to be considered for part or full time work after retirement. He also suggests that a retirement I.D. be issued upon leaving, letting retirees know that the organization still values them and "may need to call upon them in the future" (p.10). Further, Stanley suggests that used computers that might normally be sold at a reduced price be given to retirees, set up for Web access. That way, retirees can keep in touch with organizational activities and consulting, part-time, or full-time job opportunities could be communicated to them by e-mail.

Library leaders should try to influence the human resources policies of parent organizations, and to explore options available within the system that encourage the retention or re-entry of older workers. Retirement, pension, and health care plans should be shaped in ways that allow retirees to come back to work without being penalized (Stanley, 2001). They won't need maternity or parental leave benefits, but they will need health care benefits. When evaluating health-care options for employees, considering how providers will interface with Medicare will allow greater flexibility for workers over age 65 (Albrecht, 2001). Our university, for example, offers a post-retirement option for individuals who wish to work after retirement that includes continuing health care benefits until the worker is eligible

for Medicare, and a state Medigap plan after that time.

Even more innovative benefits packages might be needed to encourage older workers to continue in the workplace. Elder care benefits would help those 65-year-olds with 85-year-old parents. Childcare benefits for grandchildren would benefit those raising the next generation. Many boomers will have children in college, retired parents, and grandparents in nursing homes all at the same time (Thornburg, 1995).

### [Workplace Safety Issues](#)

Workplace safety is an issue that benefits all employees, but is particularly helpful for older employees. Albrecht (2001) lists factors related to this issue. We're lucky, as professional librarians, that most of our work involves little or no heavy lifting. However, Albrecht's points still hold true. She suggests that work schedules be rotated to reduce physical stress on all workers. For us, this may mean limiting hours on our feet in a busy reference room, or making sure that there are plenty of healthy support staff to shift and shelve materials. Work environments should be ergonomically designed. As aging bodies heal more slowly, it is important to reduce the chances of injury caused by an ill-designed workplace. Diagnostic and training programs can prevent specific conditions like tendonitis or carpal tunnel syndrome. In addition, lectures on wellness and age-related topics can increase awareness of issues, and encouraging stretch/walk breaks can model simple, effective ways of reducing long-term physical and psychological stresses that can lead to injury.

### [Importance of Training](#)

Training is a vital factor in retaining or re-hiring older people. Some organizations focus training on younger, newer employees, thinking that more experienced employees will pick up new skills on their own, or that training is wasted on those nearing retirement age. On the contrary, older employees benefit just as much from training opportunities, if not more than their younger counterparts. Ongoing education and retraining can help keep older workers both engaged and productive (Fandray, 2000). Training in new areas can re-invigorate workers' perceptions of the workplace and their work, which can become boring after many years of doing essentially the same things. Also, when supervisors encourage older workers to engage

in new training activities, it demonstrates the value placed on the work that they do, and confidence in their long-term contributions to the workplace. Those of us who have worked in libraries very long have all participated in ongoing training opportunities as new technologies have been introduced. As supervisors, we need to remember that these opportunities should be promoted for all workers, regardless of age.

In my own library, I've seen how our assumptions about age affect older librarians in terms of training. One librarian on our staff is well over retirement age, and I was told before I put together a training session on our new chat reference service that he was "resistant to technology" and might not want to participate in staffing the service. Similarly, when we purchased Palm Pilots for our librarians in preparation for creating some PDA-based services for patrons in the future, it was thought that he wasn't interested. When I spoke with him personally, however, I found that he was interested in using the technology, and enjoyed using his PDA. However, he's often skeptical of the cost-benefit ratio of such items, and doesn't rush into new technologies without a careful analysis of their usefulness. And, yes, it might take him more time to learn how to use a new technology than it would take someone more fascinated by gadgetry, but it takes him no more time than it takes another librarian who is substantially younger, but equally suspicious of technological advances.

Walker and Taylor (1999) found, among the best practices of European companies they examined, that education programs are important, but that there must be a program aimed at motivating older people to undertake further education/ training, and that such training take into account how older adults learn and process information. Recent library literature contains many articles on training older adult patrons (e.g., Van Fleet & Antell, 2002; Burwell, 2001; Fasulo, 2001; Kaplan & Jacobsen, 2001), but none on training older librarians. Yet the lessons offered on training older adults can fit either situation: make the practical value of the training apparent; make much of the training self-paced; concentrate on hands-on time and

practice; use age-peers to offer training, when possible; use concrete examples and metaphors; build confidence; encourage questions; focus on the learner, not the trainer; and make sure that the learning environment is physically accessible (Van Fleet & Antell, 2002).

One aspect of training that requires special sensitivity is evaluating the amount of support needed for older workers who leave the work force and then return after an extended length of time (Albrecht, 2001). Technological and cultural changes in the workplace can make returning stressful for these employees. In our rapidly changing technological libraries, this is a particularly important issue. If we hire post-retirement librarians to work the reference desk or to catalog materials, we must also offer training to facilitate their use of the latest software and hardware. This training should respect the experience of the older librarian, make connections with familiar print resources, and allow for ample hands-on time to work with the new resources. Cultural changes, too, can be addressed, by openly discussing some of the changes that have occurred since the individual's retirement. In order to make the returning librarian most comfortable, the training should be conducted by a senior librarian, preferably one who remembers what the milieu of the library was like at the time of the individual's retirement.

### Summary

The key to retaining our experienced workforce is respect and flexibility. If our organizational culture shows that we value the experience of older librarians and respect their abilities, then they will feel comfortable continuing to contribute for many years to come. As in any aspect of leadership, dealing with individuals on an individual basis and fitting individual needs into the organizational needs makes for the most productive and pleasant workforce. Many of the possibilities suggested here are attractive to workers of all ages (e.g., flex time, telework, training and continuing education opportunities) and therefore might be helpful in the workplace as a whole.

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