The Ageing Workforce and Employers in Fife: Appendices

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Appendix 1: Online Employer Survey

Introduction

You are invited to take part in a survey about the knowledge, understanding and management of an ageing workforce and older workers amongst workplaces in Fife.

Why is this survey being carried out?

The Scottish population is ageing and people are having to work longer.

The Workplace Team, Health Promotion, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance want to hear from employers about their experiences of the ageing workforce so that appropriate policy solutions and information and advice for employers can be developed.

The study is being undertaken by the Employment Research Institute at Edinburgh Napier University.

What do I have to do if I want to take part?

This survey will take you approximately 20 minutes to complete. Your participation is entirely voluntary. You don’t have to answer any questions you don’t want to.

The information provided by you in this survey will be used for research purposes. It will not be used in a manner which would allow identification of your individual responses. No organisations or individuals will be named in the writing up of the survey findings.

Please note that when you submit your response, you will not be able to withdraw them as we cannot link the survey responses back to you.

What if I have additional questions?

If you have any questions please contact Dr Valerie Egdell on v.egdell@napier.ac.uk

* 1. Do you agree to take part in the survey

   ○ Yes
   ○ No

IF NO SELECTED: We’re sorry. You do not meet the eligibility criteria for this survey. Thank you for taking the time to participate in this survey.
* 2. Is your workplace, or part of your workplace, based in Fife?

- [ ] Yes
- [ ] No

IF NO SELECTED: We're sorry. You do not meet the eligibility criteria for this survey. Thank you for taking the time to participate in this survey.
Section 1: Questions about you and your workplace

3. From this list, what best describes the main activity of this workplace?

Other (please specify)

4. Is this workplace a...?

- Public sector organisation (includes local authorities, councils, government departments, civil service, state schools, the NHS)
- Private sector organisation (includes partnerships, private limited companies, family-owned businesses, self employed)
- Voluntary sector organisation (includes charities and not for profit organisations)
- Social enterprise (includes for profit and not for profit)

5. Is this workplace ...?

- A single independent establishment
- Part of a larger organisation
- Don’t know

6. Approximately, how many people are working at this workplace (please write in)?

Please include all workers, including full time, part time, volunteers, seasonal workers, casual workers, interns/work placement/unpaid etc.

7. Approximately what percentage of these workers are....?

<table>
<thead>
<tr>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged under 25?</td>
</tr>
<tr>
<td>Aged over 50?</td>
</tr>
<tr>
<td>Aged over 65?</td>
</tr>
</tbody>
</table>
8. At what age would you consider someone to be an 'older worker' in your workplace?
Section 2: Business awareness of the ageing population

**IMPORTANT:** Your answer to the previous question is still valid but for the purposes of this research ‘older worker’ from this point forward in the survey refers to those aged 50 plus

9. To what extent do you agree or disagree with the following statements.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The staff profile of this workplace is getting older</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>This workplace is aware of an increased need to support older workers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population ageing is affecting the customer profile of this workplace</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population ageing will present challenges for this workplace</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>There are established policies in this workplace to address the effects of an ageing workforce</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We are currently reviewing and developing policies in this workplace to address the effects of an ageing workforce</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section 3: Policies and practices

10. How important are the following factors when recruiting employees in this workplace?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Very important</th>
<th>Important</th>
<th>Neutral</th>
<th>Not important</th>
<th>Not at all important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommended by another employee</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Age</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Closeness to retirement</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Experience</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Previous employment history</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Fit with the advertised job/role/task</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>How long you think they will stay with the workplace</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Candidate’s motivation</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Health and disability (physical/mental)</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>
Section 3: Policies and practices

11. Are there advantages to having older workers in this workplace?

Select all that apply and please answer even if you don’t currently employ any older workers

Older workers...

☐ ...are reliable
☐ ...can relate to our customers
☐ ... are experienced
☐ ...are loyal
☐ ...are productive employees
☐ ...are more flexible than younger workers
☐ ...are adaptable
☐ ...are good role models/mentors
☐ ...have good skills and knowledge
☐ ...are willing to learn new tasks
☐ ...are quick to absorb new knowledge
12. What are the challenges to having older workers in this workplace?

*Please answer even if you don’t currently employ any older workers in this workplace*

Older Workers...

- [ ] ...would find it hard to integrate into this workplace
- [ ] ...cannot relate to our customers
- [ ] ...dislike taking instructions from younger workers
- [ ] ...are hard to train
- [ ] ...are inflexible
- [ ] ...are too cautious
- [ ] ...cannot easily adapt to new technology
- [ ] ...are disruptive in team meetings
- [ ] ...are risks to health and safety
- [ ] ...have poor physical health and stamina
- [ ] ...are more expensive to employ than younger workers
- [ ] ...are more likely to require time away from work
- [ ] ...are too close to retirement
13. Does this workplace operate any of the following working arrangements and are they available to older workers?  

*Select all that apply*

<table>
<thead>
<tr>
<th>Working arrangements operated in this workplace</th>
<th>Available to older workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part-time working</td>
<td></td>
</tr>
<tr>
<td>Flexi time</td>
<td></td>
</tr>
<tr>
<td>Working at, or from, home in normal working hours</td>
<td></td>
</tr>
<tr>
<td>The ability to change set working hours or to reduce working hours</td>
<td></td>
</tr>
<tr>
<td>Compressed hours</td>
<td></td>
</tr>
<tr>
<td>Zero-hours contracts</td>
<td></td>
</tr>
<tr>
<td>Job share</td>
<td></td>
</tr>
<tr>
<td>Annualised hours</td>
<td></td>
</tr>
<tr>
<td>Phased retirement</td>
<td></td>
</tr>
<tr>
<td>Special leave (e.g. leave for bereavement, carers, unpaid, other reasons)</td>
<td></td>
</tr>
</tbody>
</table>
14. Does this workplace use any practices to ensure workers develop and keep their skills up to date to meet business needs, and do these apply to older workers?

*Select all that apply*

- **Regular reviews of training needs for all employees**
- **Requirement for line managers to encourage employees to take part in training**
- **Encouraging employees to act as mentors and mentees**
- **Catering for trainees’ individual learning styles**
- **None – my workplace has no practices to ensure employees develop and maintain their skills**

Other (please specify)

15. Do any of the following factors affect who gets to take part in training?

- **Age**
- **Potential length of service (i.e. how long they will stay)**
- **Time left before retirement**
16. What is the normal retirement age of workers at this workplace (if any)?

17. This workplace...

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>...has a formal policy on retirement</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>...provides retirement planning services for older staff members</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>...has a pension scheme to which the workplace contributes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
18. If there was a redundancy situation, which factors would be considered when selecting an individual for redundancy?

*Select all that apply*

- Role within the workplace
- Job performance/efficiency
- Adaptability/flexibility
- Short length of service
- Long length of service
- Absence/disciplinary record
- Senior member of staff
- Junior member of staff
- Financial outlay
- Older worker
- Younger worker
- Other (please specify)

[Box for specifying other factors]
Section 4: Health, safety and wellbeing

19. Has consideration been made of how suitable this workplace is for older workers?

- Yes
- No
- Don't know

20. If yes, can you please comment?

For example, has this led to any re-design/adjustment of policies or practices (current or planned)?
21. Have you, or others in this workplace, sought information or advice from any of these bodies during the last 12 months on any issues relating to the health, safety and wellbeing of your employees? This could be in person, over the telephone, or through a website.

Select all that apply

- Specialist consultant
- External lawyers
- Acas
- Trade Union
- Employers’ association
- Occupational health
- Charity/third sector organisation
- Citizens Advice Bureau
- Professional body
- Government department or agency
- Healthy Working Lives Fife/Health Promotion
- Working Health Services
- Fit for Work Scotland
- Scottish Centre for Healthy Working Lives
- Specialist HR consultant
- Internal HR
- Other internal adviser
- Other (please specify)
Section 4: Health, safety and wellbeing

22. To what extent do you agree or disagree that older workers are able to perform jobs that involve …

<table>
<thead>
<tr>
<th>Activity</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>…operating machinery</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…working in harsh physical environments</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…driving</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…good vision</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…good hearing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…working at height</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…lifting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…working with computers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…delivery/courier work</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>…wearing personal protective equipment</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>…customer interaction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…working outdoors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…shift work</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…working in a fast-paced environment</td>
<td></td>
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<td></td>
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<tr>
<td>…memory skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…working in a busy and noisy environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section 4: Health, safety and wellbeing

23. If a number of older workers working in this workplace increased substantially, do you think there would be the need to discuss, review and/or change...

<table>
<thead>
<tr>
<th>... attendance management policies/procedures</th>
<th>Yes</th>
<th>No</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>... absence management policies/procedures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... performance management policies/procedures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... the nature of the work</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... contracts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... fitness for work assessment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... duties</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... flexible working</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... career reviews</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... learning and development reviews</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... physical adjustment to the working environment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>... the working day e.g. scheduling of shifts, the amount of overtime worked</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section 5: Supporting employers in Fife

This survey has asked a lot of questions about your workplace’s policies and practices. In light of the issues raised...

24. Would this workplace welcome information, support or advice on the ageing workforce and older workers?

25. What information, support or advice would be useful for your workplace to improve knowledge, understanding and management of an ageing workforce and older workers?

*Select all that apply*

- Expert advice and guidance on workplace health, safety and wellbeing
- Occupational health and safety needs assessment visits
- Workplace health and wellbeing needs assessment
- Provision of information and resources
- Local employer associations sharing practice
- Communities for knowledge sharing
- Workplace training and awareness sessions on ageing workforce/older adults issues
- One to one support tailored to your workplace
- Focused training/workshop on long term health conditions/disabilities
- Paper or web based toolkit guides
- Web information
- Support by email
- Information pack/leaflets
- Free information, support or advice
- Confidential information, support or advice, not involving enforcing authorities (Health and Safety Executive, Environmental Health etc.)
- Other (please specify)
26. Are there any topics you feel that this workplace needs support with to proactively prepare for an ageing workforce?
Thank you for taking the time to complete this survey

As part of this research we would like to produce case studies about employer experiences an ageing workforce. These could be examples of good practice or highlighting any challenges faced in dealing with older workers. To develop the case studies, we would visit your workplace and conduct interviews with relevant members of staff.

27. Would you be interested in your workplace being one of the employer case studies?

- Yes (please provide your contact details below)
- No

28. Your contact details

Name [ ]
Telephone [ ]
Email address [ ]
Ageing and Employers in Fife: Participant Information Sheet

Your workplace is invited to take part in research about the knowledge, understanding and management of an ageing workforce and older workers amongst workplaces in Fife.

As part of this research case studies are being developed about workplace experiences of population ageing. These could be examples of good practice or highlighting any challenges faced in dealing with older workers.

Why is this research being carried out?

The UK population is ageing and people are working longer, especially since the abolishment of the default retirement age and the rising statutory retirement age. This will have a significant impact on employers who are at the same time having to grapple with the continued effects of the economic recession and austerity.

It is important that we hear from employers about their experiences of the ageing workforce so that appropriate policy solutions, information and advice for employers can be developed. We need to understand what workplaces in Fife need to maintain and improve economic sustainability, business continuity, safety and wellbeing of workers.

Who is carrying out the research?

The research is being undertaken by the Employment Research Institute at Edinburgh Napier University on behalf of the Workplace Team, Health Promotion, Fife Health and Social Care Partnership, and Fife Health and Wellbeing Alliance.
What will happen if this workplace takes part in the case studies?

To develop the case studies, researchers from the Employment Research Institute would visit your workplace and conduct interviews with relevant members of managerial staff (e.g. general managers, HR managers) to understand workplace policies, practices and experiences.

In addition, we would also like to interview any workers aged 50 plus to understand their individual experiences.

Participation is entirely voluntary. The individual interviews would take no longer than 45 minutes. The interviews will be audio recorded with permission of the interviewee.

How will the information be used?

The information provided will be used only for the project reports, or for academic papers and presentations relating to the project.

Interviews with the members of managerial staff: No individuals will be named in the writing up of the case studies developed from the interviews with members of managerial staff. The organisation would only be named with permission of all the managerial staff interviewed. Drafts of the case studies would be provided by the research team to the managerial staff interviewed for feedback if the organisation is to be named in the case study.

Interviews with workers aged 50 plus: The information provided by workers aged 50 plus will be written up separately from the case studies to protect the anonymity of these individuals. Neither the individuals nor the organisation that they work for will be named in the writing up of these interviews.

What if I have additional questions?

If you have any questions please contact Dr Valerie Egdell on: v.egdell@napier.ac.uk or 0131 455 4714.
Appendix 3: Employer Practice Case Studies Consent Forms

Title of Project: Ageing and Employers in Fife
Consent Form for Managerial Staff

- I agree to take part in the above study.
- The aims of this research have been explained to me. I have had the opportunity to ask questions and have had these answered satisfactorily.
- I understand that my participation is voluntary and I may decline to answer any question, or end the interview, at any time.
- I agree to the audio recording of this interview.
- I understand that the audio recordings and transcripts will only be accessed by the research team and will not be passed onto any third parties.
- I understand that the data collected in this interview will be used only for the project reports, or for academic papers and presentations relating to the project.
- No individuals will be named in the writing up of the case studies developed from the interviews with members of managerial staff.
- I understand that the organisation that I work for will only be named in the writing up of the case studies with the permission of all the managerial staff interviewed.
- I understand that drafts of the case studies will be provided by the research team to all the managerial staff interviewed for feedback if the organisation is to be named in the writing up of the case studies.

Name of Participant  Date  Signature

Name of Person  Date  Signature
Taking Consent
Title of Project: Ageing and Employers in Fife
Consent Form for Workers Aged 50 Plus

- I agree to take part in the above study.

- The aims of this research have been explained to me. I have had the opportunity to ask questions and have had these answered satisfactorily.

- I understand that my participation is voluntary and I may decline to answer any question, or end the interview, at any time.

- I agree to the audio recording of this interview.

- I understand that the audio recordings and transcripts will only be accessed by the research team and will not be passed onto any third parties.

- I understand that the data collected in this interview will be used only for the project reports, or for academic papers and presentations relating to the project.

- I understand that neither I, nor the organisation that I work for, will be named in the writing up of this interview.

Name of Participant ____________________________ Date ____________ Signature ____________

Name of Person ____________________________ Taking Consent Date ____________ Signature ____________
Appendix 4: Workplace Practice Case Studies Interview Schedules

Ageing and Employers in Fife – Case Study Interviews with Employers/Managers

My name is [Name] and I work at the Employment Research Institute at Edinburgh Napier University. We are conducting research about the knowledge, understanding and management of an ageing workforce and older workers amongst workplaces in Fife. We are carrying out this research on behalf of the Workplace Team, Health Promotion, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance.

As part of this research case studies are being developed about workplace experiences of population ageing. To develop these case studies interviews are being conducted with relevant members of managerial staff (e.g. general managers, HR managers) to understand workplace policies, practices and experiences.

This interview will last approximately 45 minutes. With your permission we would like to audio record the interview, but if you prefer we could also do the interview without recording it.

The information provided will be used only for the project reports, or for academic papers and presentations relating to the project.

No individuals will be named in the writing up of the case studies developed from the interviews with members of managerial staff. The organisation would only be named with permission of all the managerial staff interviewed in your organisation. Drafts of the case studies will be provided to you by the research team for feedback if your organisation will be named in the writing up of the case study.

Thank you.

We would like to start by asking some questions about you and your workplace...

1. What is the main activity of this workplace?

2. What is your position at this workplace?

   Probe: How long have you been working here? How long have you been working in your current role?
3. **Can you tell me what your job involves?**

Probe responsibility for: Working hours; Holiday entitlements; Pension entitlements; Recruitment or selection of employees; Training of employees; Grievances or grievance procedures; Disciplinary matters or disciplinary procedures; Staffing plans; Equal opportunities and diversity; Health and safety; Performance appraisals

4. **Approximately, how many people are working at this workplace?**

Please include all workers, including full time, part time, volunteers, seasonal workers, casual workers, interns/work placement/unpaid

   a. **Approximately what percentage of these employees are....?**

<table>
<thead>
<tr>
<th>Aged under 25?</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged over 50?</td>
<td>%</td>
</tr>
<tr>
<td>Aged over 65?</td>
<td>%</td>
</tr>
</tbody>
</table>

We would now like to ask you some questions about whether population ageing is an issue that is affecting your workplace...

5. **At what age would you consider someone to be an ‘older worker’ in your workplace?**

   Probe: Why would you consider someone to be older at this age?

   *Interviewer: Before moving to the next question clarify that for the purposes of this research we define an older worker to be aged 50 plus – but answer given previously is still valid*

6. **Do you consider that population ageing is an issue that is affecting this workplace now or in the future?**

   Probe: Reasons for answer e.g. age and profile of the workforce, size of organization, customer profile, demand for your product/services. Do you consider that population ageing to be an opportunity or a challenge for this workplace?

7. **Have you ever considered how suitable your workplace is for older workers?**

   Probe: Policies/procedures, the nature of the work, the working day, duties, contracts, the physical working environment. Do you think that this workplace is generally suitable for older workers?
8. If the number of older workers working in this workplace increased substantially in the future do you think that you would need to make any changes to this workplace?

Probe: Policies/procedures, the nature of the work, the working day, duties, flexible working, contract changes, fitness for work assessment, physical adjustment to the working environment. Would this workplace be willing and/or able to make these changes?

We would now like to ask you some questions about how you recruit and promote employees in this workplace...

9. How important is the age of an applicant when recruiting employees?

Probe: In what sense is it important? Are there any specific things you do to encourage applications from older workers? (e.g. Where you advertise, statement, age positive logo)

10. What are the routes to promotion in this workplace?

Probe: Is promotion restricted in any way? E.g. to full-time workers, time in the organisation, age, those without caring responsibilities. Are staff of all ages supported equally to progress?

We would now like to ask you some questions about your views on having older workers working in this workplace...

11. Are there any advantages or disadvantages to having older workers working in this workplace? (Please answer even if you don’t currently employ any older workers)

Probe: the nature of the work, integration into the workplace, customer demand, health of older workers, work ethic of older workers, loyalty of older workers?

12. Do you think that some jobs in this workplace are more suitable for people of certain ages?

Probe: What are the age ranges that are more and less suitable and what factors affect the suitability for this/these job/s
13. **To what extent do you agree or disagree that older workers are able to perform jobs that involve...** (Use a self-completion card for this question)
*Please answer even if you don’t currently employ any older workers*

Probe: Ask the interviewee to comment on their responses at the extremes

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<tr>
<th>Job Activity</th>
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<th>Neither agree nor disagree</th>
<th>Disagree</th>
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<td>Good vision</td>
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<td>Delivery/courier work</td>
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<tr>
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<tr>
<td>Working in a busy and noisy environment</td>
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</table>

We would now like to ask you some questions about working arrangements and training in this workplace...

14. **Are there any specific provisions in terms of flexible working arrangements within this workplace for workers after they reach 50 years of age?**
Probe flexible working arrangements: The different types of arrangements operated and the uptake of these arrangements. What are the benefits of offering these arrangements? Does this workplace face any constraints in providing flexible working arrangements? If no flexible working arrangements offered, why is this the case?

15. Does this workplace use any practices to ensure workers develop and keep their skills up to date to meet business needs?

Probe: The different types of practices used. Are staff of all ages supported equally to take part in training? Does the age of an employee affect whether they get to take part in training? If yes, why? Do you hold personal development plan/review or job review meetings?

We would now like to ask you some questions about retirement...

16. What is the normal retirement age of staff (if any)?

Probe: Does this workplace: have a formal policy on retirement; provide retirement planning services for older staff members?

17. Would this workplace ever consider changing an older workers working patterns to enable/encourage them to stay in work longer e.g. part time work, flexible working arrangements, change of role/responsibilities?

We have asked a lot of questions about your workplace’s policies and practices. In light of the issues raised...

18. Would you welcome information, support or advice on the ageing workforce and older workers – now or in the future?

Probe: What information, support or advice would be useful for your workplace to improve knowledge, understanding and management of an ageing workforce and older workers?

Probe: Are there any areas you feel you need support with to proactively prepare for an ageing workforce?

Close: Any other points that the respondent would like to raise.
Ageing and Employers in Fife – Case Study Interviews with Older Workers

My name is [Name] and I work at the Employment Research Institute at Edinburgh Napier University. We are conducting research about the knowledge, understanding and management of an ageing workforce and older workers amongst workplaces in Fife. We are carrying out this research on behalf of the Workplace Team, Health Promotion, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance.

As part of this research case studies are being developed about workplace experiences of population ageing. As well as interviewing managerial staff to understand workplace policies, practices and experiences, we would also like to speak to workers who are aged 50 plus to understand their individual experiences.

This interview will last approximately 30 minutes and all your answers will remain anonymous. With your permission we would like to audio record the interview, but if you prefer we could also do the interview without recording it.

The information provided will be used only for the project reports, or for academic papers and presentations relating to the project.

The information provided by you will be written up separately from the case study of your organisation which will be developed from the interviews with managerial staff. We will not name you or the organisation that you work for when writing up your interview in our report.

Thank you.

We would like to start by asking some questions about you ...

1. **What is your position at this workplace?**

   Probe: How long have you been working here? How long have you been working in your current role? Can you tell me what your job involves?

2. **What hours do you work? What kind of contract are you on?**

   Probe: Shift patterns, PT/FT, flexible working arrangements, working from home, ability to vary start and finish times. Permanent, temporary, fixed-term contract, casual, zero-hours contract

3. **Do you mind telling me how old you are?**

4. **At what age would you say that someone was generally thought of as an ‘older worker/employee’ in this workplace?**
5. Do you think that this workplace is generally supportive of older workers?

6. Do you think that there are any advantages or disadvantages to having older workers working in this workplace?

Probe: the nature of the work, integration into the workplace, customer demand, health of older workers, work ethic of older workers, loyalty of older workers?

Probe: Do you think that some jobs in this workplace that are more suitable for people of certain ages? What are the age ranges that are more and less suitable and what factors affect the suitability for this job?

7. To what extent do you agree or disagree that older workers are able to perform jobs that involve.... (Use a self-completion card for this question)

Probe: Ask the interviewee to comment on their responses at the extremes

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<tr>
<th></th>
<th>Strongly agree</th>
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</table>
We would now like to ask you some questions about your experiences of working at this workplace...

8. If the number of older workers working in this workplace increased substantially in the future do you think that you would need to make any changes to this workplace?

Probe: Policies/procedures, the nature of the work, the working day, duties, flexible working, contract changes, fitness for work assessment, physical adjustment to the working environment. Do you feel that your workplace would be willing and/or able to make these changes? Do you think that this workplace is generally suitable for older workers?

9. What makes a good job? Do you think that you are currently in a good job? What would make your job better?

Probe: Occupation, seniority/level of responsibility, employed vs. self-employed, number of hours worked, amount of flexibility in hours at work, amount of flexibility in location of work

10. Have you taken part in any training since starting work in this workplace?

Probe: If yes, did you find the training useful? Do you think that your employer is supportive of you taking part in training? Has there been any occasion where you would have liked to take part in training but you didn’t?

11. Do you have a personal development plan/review or job review meetings?

Probe: Who takes part in the plan/review/meetings? How often are those meetings? Do you find them useful? Do you feel you can openly talk about things that worry you? Do you feel your workplace supports the personal development of staff? – are staff of all ages supported equally?
12. **Have you ever been promoted in this workplace?**

Probe: Have you ever applied for promotion but have not been successful? If no, have you ever considered applying for promotion? Do you feel your workplace supports staff to progress? – are staff of all ages supported equally?

13. **Are you aware of any specific provision within this workplace for workers after they reach 50 years of age?**

Probe: Specific training; Flexible working patterns; etc. Do you think that this workplace is generally supportive of workers aged 50 plus?

14. **Have you faced any barriers in being able to continue to work since turning 50?**

Probe: Workplace – attitudes, working patterns, nature of the work; job satisfaction; health; family; financial; motivation

15. **Would you like to change anything of your current job?**

Probe: What would you change? Do you feel your workplace would support you in making these changes? Are there any changes you would like to make to your working situation as you get older?

16. **Have you ever felt that you have been treated differently in your job because of your age?** (e.g. treated less favourably, assumptions have been made about you because of your age)

Probe: The impact of being treated differently (e.g. self-esteem, thought about retirement or looking for a new job), actions taken (e.g. discussed with family, peers or co-workers, raised the issue with employer/manager, raised the issues with an external organisation)

*We would now like to ask you some questions about retirement...*

17. **When do you think you will retire?**

Probe: Reasons for retiring at this age. Do you have any plans for your retirement? Why do you plan to retire at that time rather than earlier?

18. **Would anything make you consider staying in work longer e.g. part time work, flexible working arrangements, change of role/responsibilities?**
Probe: Do you feel your workplace would support you to work longer by making these changes to your working patterns?

Close: Any other points that the respondent would like to raise.
Appendix 5: Current and projected population by Fife sub-council areas

Almost a third of Fife’s resident population lived in the three principal towns of Dunfermline, Kirkcaldy and Glenrothes. Together these three towns accounted for nearly one third of the older people aged 50 and over in Fife. However, the proportion of those aged 50 plus in these three towns (34.0%, 38.1% and 38.3 respectively) was comparatively lower than other towns in Fife (National Records of Scotland, 2016).

Current and projected population proportions by Fife sub-council area for those aged 50 plus are displayed in Figure A5.1 and A5.2. The most recent population projections by region are based on 2012. In 2012 the area with the highest proportion of its population aged 50 plus in Fife was East Neuk and Land Ward (49.4%); followed by Howe of Fife and Tay Coast (44.9%), and Leven, Kennoway and Largo (43.5%). By 2037 East Neuk and Land Ward are still expected to have the highest proportion of its population aged 50 plus (61.1%). Howe of Fife and Tay Coast will be the second highest (54.4%) and West Fife and Coastal Villages (52.5%) the third highest.

As Figure A5.1 and A5.2 shows the top three areas in terms of projected increase in the proportion of older people between 2012 and 2037 are East Neuk and Land Ward (11.7%), Inverkeithing and Dalgety Bay (11.4%) and West Fife and Coastal Villages (10.3%). The smallest increase is projected is Kirkcaldy (0.1%), St. Andrews (0.5%), and Burntisland, Kinghorn and Western Kirkcaldy area (1.6%).
Figure A5.1 Current and projected population proportions by Fife sub-council areas for 50+

Source: National Records of Scotland
Figure A5.2 Current and projected population proportions by Fife sub-council areas

Source: National Records of Scotland

2012

Buckhaven, Methil and Wemyss Villages

2037

Burntisland, Kinghorn and Western Kirkcaldy
Dunfermline

2012

Age

% Males
% Females

0-4 yrs.
5-9 yrs.
10-14 yrs.
15-19 yrs.
20-24 yrs.
25-29 yrs.
30-34 yrs.
35-39 yrs.
40-44 yrs.
45-49 yrs.
50-54 yrs.
55-59 yrs.
60-64 yrs.
65-69 yrs.
70-74 yrs.
75-79 yrs.
80-84 yrs.
85+ yrs.

East Neuk and Land Ward

2037

Age

% Males
% Females

0-4 yrs.
5-9 yrs.
10-14 yrs.
15-19 yrs.
20-24 yrs.
25-29 yrs.
30-34 yrs.
35-39 yrs.
40-44 yrs.
45-49 yrs.
50-54 yrs.
55-59 yrs.
60-64 yrs.
65-69 yrs.
70-74 yrs.
75-79 yrs.
80-84 yrs.
85+ yrs.
Glenrothes

Howe of Fife and Tay Coast
Rosyth

2012

Tay Bridgehead

2037
The Lochs

West Fife and Coastal Villages

The Lochs

West Fife and Coastal Villages
Using data from the 2011 Census, Figure A5.3 displays the age profile for the main towns in Fife. St Andrews stands out in particular because of the high proportion of 16-29 year olds (51.3%) and lower proportions in the other age groups (except for those aged 75 plus where it performs similarly to the other areas). This is not unexpected because of the presence of the University of St Andrews and a buoyant high technology sector in the town. Considering Fife as a whole, it has 1.2% fewer 16-29 year olds when compared to Scotland as a whole.

Although there are slightly more 60-74 years in Fife than in Scotland as a whole, the proportions are very similar for both. With the exception of the university town of St Andrews there is similarity between the principal towns. A similar pattern can be observed for the 45-59-year-old age group (see Figure A5.3).
Figure A5.3 Age profile for the main towns comparing with Fife and Scotland

![Age profile chart](chart.png)

Source: 2011 Census

Figure A5.4 presents the unemployment rate for the main towns, Fife as a whole and Scotland. The unemployment rates are very similar for Fife and Scotland across all categories. For the unemployment rate for all age groups, St Andrews has the lowest. The other areas have similar unemployment rates, although they are slightly higher in Kirkcaldy and Glenrothes. For the 16-24-year-old group, Glenrothes has the highest unemployment rate. The rates in the other areas are similar. For the 50-74-year-old group, there is almost no difference in unemployment rate between the areas.
Figure A5.4 Unemployment rate for all Fife towns, Fife and Scotland as a whole

Source: 2011 Census
## Notes for Figure A5.1

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<tr>
<th>Full name of area</th>
<th>Abbreviated name of area</th>
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## References

Appendix 6: Online survey sample

Table A6.1: Breakdown of the sample

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Appendix 7: Case studies of workplace practice

Appendix 7.1

**Ensuring business sustainability - Kingdom Investments**

**Background**

Kingdom Investments is a Financial Adviser Firm which has been established for over 17 years. They have offices in Dunfermline and offer full financial planning including investments, pensions, protection, mortgages and will writing. There are 19 staff (including office staff and advisors) working for Kingdom Investments. The majority of the staff are aged 50 plus.

**Ensuring business sustainability**

Kingdom Investments operates a system whereby older advisors can reduce their responsibilities or phase their retirement. This system was put in place following new regulation requirements put in place by the Financial Conduct Authority which required all financial advisers to be qualified at Level 4 of the Qualifications and Credit Framework or above. At the time, a number of the older advisors considered retirement, as gaining these qualifications was felt to be onerous. In order to not lose the skills of these experienced advisors, Business Development roles were created within the company.

Older advisors who are thinking about retirement are also encouraged to work in tandem with trainee advisors and gradually pass over clients. This also helps trainee advisors to develop their client base. Those who retire, having passed on their clients, have a package put in place whereby in their first year of retirement they are available by telephone to help the trainee advisors who have taken on their clients. Over a period of 5 years, the financial income from clients is shared between the new advisor, and the retiring advisor from whom they inherited the client.

The Managing Director at Kingdom Investments feels that this approach has helped with client retention: "The main benefit to the business of this approach was that our clients who are our primary concern were able to have a smooth transition from an advisor they had known for many years to a new advisor and the new advisor also was able to learn some important ‘soft facts’ about the clients that perhaps would not be in our client information. Overall this allowed a greater amount of client retention”

**Learning point**

Workplaces that have a high proportion of workers aged 50 plus may need to consider the implications of this in terms of business sustainability. Options for workers to reduce their responsibilities or phase their retirement can offer opportunities for the mentoring of younger
colleagues and help ensure that skills, experience and knowledge are not lost to a company. Approaches such as these are also very important for client retention.
Appendix 7.2

**Town and Gown Letting – The Business Benefits of Employing Older Workers**

**Background**

Town and Gown Letting is a specialist letting agency set up to supply a dedicated letting service for the undergraduate and postgraduate market in St Andrews. Established in 2003, they have seven staff - six of whom are aged 50 plus.

**The business benefits of employing older workers**

As the majority of Town and Gown Letting’s clients (property owners) are aged 50 plus, they feel that there is great value to have an older workforce. Clients are perceived to be able to better relate to those of their own age. Those aged 50 plus also bring valuable skills and life experience.

The Managing Director reflected on other business benefits to employing older workers: “I have found that over the years the loyalty and ability to change routine that older employees far outweighs any slight delay in being able to pick up technology. I have also found that the sickness rate is also lower”.

**Learning point**

The ageing population is affecting workplaces not only in terms of the workforce, but also customers/clients/service users. Workplaces may find that older workers are of benefit, because they can better relate to an older client base.
Appendix 7.3

Adapting to new technology - Berner UK Limited

Background

Berner UK Ltd in Dunfermline supplies engineering and automotive products, hand and power tools, janitorial, PPE and workshop consumables throughout the UK, primarily to customers in the bus and coach and transportation markets. They serve local authorities and the utilities markets by providing and developing a range of products and services.

It is the UK subsidiary of the European multinational Berner (which comprises of about 60 companies in 25 countries). Berner UK Ltd employs approximately 65 employees, some based in their headquarters and warehouse in Dunfermline, and others working as part of the field sales team regularly visiting the customers on site throughout the UK. In terms of HR policy Berner UK Ltd is very much standalone although they do take the lead from the group in terms of training and development, and overall strategy.

Adapting to new technology

In 2015 Berner UK Ltd introduced iPads for the on the field sales team. The majority of this team are aged over 50 years. A whole day’s training was provided to support those using this new technology. Follow up training was also provided to those who were struggling to adapt to the new technology. Some of the team found it a steep learning curve – this included both younger and older workers. As a result, some chose to retire or move to less demanding jobs.

Learning from these experiences, Berner UK Ltd have adapted the training offered. They seek feedback from those taking part in order that the training can be adapted and improved.

Berner UK Ltd’s HR Advisor reflected about what was learnt from this experience: “We have learnt not to make the assumption that employees will have basic IT skills. Although we are living in the digital age it is apparent to us now that not everyone has embraced technology. As such we now seek to identify an employee’s degree of IT understanding, then provide bespoke training to the individual”.

Learning point

Some workers may find it difficult to adapt to the introduction of new technology. Assumptions should not be made that technology only presents a challenge to older workers as both younger and older workers may struggle to adapt. Training should be offered to support workers. The effectiveness of this training should be monitored so that it can be adapted, if need be, in future.
Appendix 7.4

Phased retirement - Port of Rosyth

**Background**

Forth Ports is a UK-based multimodal ports owner and operator. Forth Ports owns and operates eight commercial ports on the Firth of Forth, the Firth of Tay and the Thames.

The Port of Rosyth is centrally located on the north bank of the River Forth. As well as the freight ferry service, the port handles a range of cargoes. It provides a range of facilities and equipment to help meet businesses’ logistical needs. The port also offers key berthing facilities for both transit and turnaround cruise calls.

**Phased retirement**

Forth Ports has a retirement rundown programme for employees who advise that they want to start their pension. Employees can only enter the programme after their 59th birthday. Through the programme they are able to work phased reduced days/hours on full pay until they retire. This programme helps employees adapt to retirement.

The purpose of the retirement rundown scheme is to help employees prepare for retirement so that when they actually retire, they have adjusted to this. The way that the scheme works is as follows: For the first 6 months of the pre-retirement year, the employee works a 4-day week. The actual day off to be agreed at the start of the process with their line manager. After 6 months, the employee’s working week reduces to a 3-day week. For the last 3 months of the year, the employee works a 2-day week.

**Learning point**

Older workers might want to work more flexibly, decrease their pace of working, or reduce their working hours in the run up to retirement. Phased retirement programmes can be one way in which to enable older workers to do this.
Appendix 7.5

Monitoring the health of workers - Burntisland Fabrications Ltd (BiFab)

Background

BiFab delivers major fabrication works from facilities in Burntisland and Methil in Fife and Arnish Point near Stornoway for the oil and gas and renewable industry sectors. They have a large pool of skilled labour, including both permanent staff and contractors, covering disciplines such as welding, plating, scaffolding and associated support services.

Monitoring the health of workers

The roles at BiFab can be physically demanding due to the nature of the work involved and can include working outside in sometimes challenging conditions. Age is not felt to be a barrier. The capability, knowledge and skills of a worker are most important.

BiFab undertakes regular medical assessments of staff. On recruitment all personnel, both permanent staff and contractors, have to undergo a medical assessment with the company’s Occupational Health Nurse to ensure that they are capable to undertake the role. Permanent staff are subject to annual medical assessments with the Occupational Health Nurse. Through these assessments the health of the permanent staff can be monitored year on year and any trends identified and any remedial action taken. Any individual leaving the business is given the option of undergoing an exit medical on a voluntary basis.

Due to the nature of the work, opportunities to adapt the workplace are limited. The business will continue to need skilled workers who can undertake physically demanding work when required. If an individual has been off work for an extended period with a health issue, they are phased back into work and/or redeployed to lighter duties for a period of time.

Any individual who has been absent on health grounds for a week or more, is automatically referred to the Occupational Health nurse for a review.

The HR Manager at BiFab has stated that: “Having an Occupational Health function in the business allows for regular health surveillance to be carried out which can allow for tracking of general health during employment or monitoring any pre-existing conditions identified through pre-employment screening. For older workers, this can have the effect of encouraging them to self-refer any concerns with Occupational Health and make an appointment with their own GP which they may be reluctant to do otherwise. Those who take up this facility will provide positive feedback to other colleagues who may be encouraged to do the same. From a recruitment perspective, with BiFab taking a pro-active stance on health surveillance and health promotion activities, it sends a positive message that the business has a genuine interest in the welfare and well-being of its workforce.”
Learning point

In some workplaces there will always be the need for workers to undertake physically demanding work when required, and it may be difficult to make adaptations to the work. Age is not necessarily a barrier in workplaces that have many physically demanding roles. Having mechanisms in place to monitor the health of workers of all ages, are however useful to ensure individual capability and to monitor health over a longer term.