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SOUTH EAST ENGLAND FORUM ON AGEING

# Valuing Older Workers research project

## Project objectives

SEEFA commissioned Nick Wilson to undertake this 'Valuing Older Workers' project to:

- Identify, research and report on voluntary sector effective practice in capitalising on the knowledge, skills and talents of older workers (paid and unpaid).
- Make recommendations on how to encourage other voluntary organisations, and potentially the private and public sectors, to draw on this effective practice.

## Reasons for the project

There is ample evidence that work, or more specifically good work, is good for people's health and well-being. Demographic changes mean that employers will increasingly need to rely on recruiting and retaining workers over the age of 50, while increased longevity and pension challenges mean that many older people will want to, or have to, work longer.

These changes mean that employers will need to become more flexible and open minded about whom they recruit. They will also need to improve their approaches to employee retention, including re-skilling opportunities and more flexible working patterns, with support for older employees to consider different options if they want to move into alternative work or if they need, for example, to care for elderly relatives.

SEEFA has a recognised track record in this area based on the South East's ground-breaking 40-70 Tomorrow's Workforce programme, which influenced the content of the national 50+ Works guidance for organisations contracted to the Department for Work and Pensions, and its Silver Academy programme which explored how to help older workers set up their own businesses.

Other research has usually focused on the private and public sectors. SEEFA wanted this project to focus specifically on the voluntary sector, in which some organisations reputedly have been in the forefront of utilising the knowledge, skills and talents of older workers. The project was intended to test this hypothesis and, assuming it was shown to be true, to draw out key lessons from existing examples of effective practice.

SEEFA's aim is to disseminate these lessons within the voluntary sector itself and, so far as it is relevant, within the private and public sectors. Experience from the previous South East initiatives has been contributing to the work of two national Age Action Alliance groups focused on employment. SEEFA hopes that the outputs from this new research will be of value nationally as well as to South East partners.

## Methodology & structure of report

Extensive consultation was undertaken to identify a short-list of voluntary sector organisations considered to have 'age-friendly' policies and practices. Structured telephone interviews were then conducted with senior staff in 6 organisations of very different kinds and size (all but one of which are based in the South East of England): The Children's Trust; CSV's LifeLines project; Samaritans; 3VA (a local Council for Voluntary Services); VTCT (an educational charity); and Women's Pioneer Housing.

Case studies about these 6 organisations make up most of this 10 page report. **The next two pages set out key points from these case studies which other organisations may like to consider.** The report has deliberately been kept short and to the point which hopefully will make it useful and accessible to busy people.

## Overview

The interviews with the 6 organisations confirmed that older workers, whether they are paid employees or volunteers, are of great value to the voluntary sector. This is because of their life experience and skills and, particularly in the case of volunteers, their availability and flexibility. It is not generally translated into employment policies and practices with a specific focus on older workers but, rather, into policies and practices which embrace them – opportunities for flexible working being a prime example.

A key message was that it is important to have a formalised set of policies and procedures, although these need not be burdensome: one organisation, for example, has drawn on advice and documentation from Penisula Small Business Service. **It is hoped that the case studies and the 2 checklists below, each drawn entirely from the case studies, will prompt and help other organisations to review their approaches to the older workforce.**

## Checklist 1: things to consider about the employment of older workers

- Make sure your organisation's values, policies and practices are open, inclusive and empowering and that they recognise the value of older workers, whether they are paid employees or volunteers.

- Ensure you have a wide recruitment net to reach people of all ages and backgrounds, utilising databases of local organisations, networks of volunteers and the power of 'word of mouth'.

- Embrace and demonstrate a real openness to recruiting people of whatever age, while recognising how people's life experience can make them particularly suitable for particular roles.

- Operate recruitment practices with no age limits and which are 'age blind' e.g. accepting hand-written applications and excluding people's names, ages and other characteristics during short-listing.

- Avoid undue requirements for existing IT skills and be prepared to offer training and mentoring support (e.g. from younger employees) for those who are willing to update or aquire new IT skills.

- Make relevant training at all ages 'an expectation rather than an offer', with all staff having a personal training plan and with training organised so that it is accessible for staff working part-time or at home.

- Ensure recruitment and management training includes a focus on avoiding age and other kinds of bias.

- As with parents of young families, be aware of older people's caring responsibilities for elderly relatives which may increase over time, affecting stress levels and work effectiveness.

- Give people of all ages the opportunity to apply for flexible working options such as part-time working, flexi-time and remote working, including working from home.

- Be prepared to grant special leave for hospital visits and other emergency caring responsibilities, particularly when dependents live far away.

- Be willing to consider changes in working arrangements to help people prepare for retirement, to increase their commitment to study or voluntary work, or otherwise to change their work-life balance.

- On the other hand, be clear with staff about the need to put limits on flexible working where this might impede organisational effectiveness, and spell out what those limits are likely to be.

- As low staff turnover can be a mixed blessing if it stops an organisation refreshing itself, see loss of the Default Retirement Age as a trigger to review the age balance of your organisation and to check whether performance review and capability arrangements need sharpening up.

- Use performance reviews as an opportunity for people to consider their long term plans, the implications of having to work longer before reaching the state retirement age and the need to update their skills.

- For people on time-limited contracts (e.g. project staff) use performance reviews to consider alternative employment options.

- Require staff of all ages to have at least one developmental goal and use this for a dialogue between managers and older staff about the latter's intentions as regards continued employment beyond the state pension age.

- Avoid making assumptions about people's plans and ambitions and be prepared to challenge younger staff who need to raise their aspirations, or older staff who are no longer carrying out their roles effectively.

- Ensure that management training and coaching includes a focus on the handling of later age issues.

- Celebrate the contributions of older and longer serving staff, whether they are paid or volunteers.

## Checklist 2: things to consider relating particularly to volunteers

- Follow the recruitment and management principles applying to paid staff but in ways that recognise the differences in the relationship with volunteers, keeping processes and paperwork to the necessary minimum.

- Have clear volunteering policies and guidelines, write them down and share them.

- Use a wide range of ways of attracting volunteers including, particularly, word of mouth through existing volunteers and networks.

- When recruiting, understand the things which affect someone's ability to volunteer, whether arising from age or from other factors e.g. transport issues, financial constraints, ergonomic requirements.

- Role descriptions: for most roles (i.e. except where the specific intention is for the volunteer to design and develop an activity) be absolutely clear about, and write down, what volunteers will be expected to do.

- Select for the requirements of the role: for example, if resilience and evidence of life experience are essential, recruit against these criteria even if that means an imperfect age, gender or ethnic balance.

- When volunteers are being asked to design and develop community activities, support them to do so based on their interests, skills and experience and to further develop their activities over time.

- Provide structured support in the form of induction, essential ('light touch') procedures, guidance on the 'boundaries' of appropriate behaviour and training which responds to volunteers' needs.

- Provide appropriate training, and support volunteers to systematically build on their skills and experience.

- Ensure a 'sufficient critical mass' of volunteers to avoid placing too great a burden on an individual volunteer.

- If a volunteer's ability to perform a role diminishes, adopt a supportive, problem solving approach including mentoring, mediation and, where appropriate, guiding people into alternative roles.

- Ensure that your procedures do provide for dismissal in the last resort where a volunteer is no longer performing effectively after the provision of guidance, mentoring and other support.

# The six case studies

## 1. The Children's Trust

The Children's Trust provides care, education, therapy and rehabilitation to children with multiple disabilities, complex health needs and acquired brain injury. It is based at Tadworth in Surrey but offers services to children from across the UK. The Trust has a workforce of 1,046 of whom 52% are paid employees and 48% are volunteers. Of the 540 paid employees, one third are aged between 50 and 69 with an average of 10 years' service. 5 paid employees (1%) are aged 70+ with an average of 14 years' service.

The Trust has recently refreshed its Values in partnership with its employees, identifying the following as being an essential part of working at the Trust:

- Child and family focused
- Professional
- Caring and supportive
- Fun
- Can do
- Collaborative

The Trust is an accredited Investors in People (IiP) employer. Its human resources policies and practices are generally designed to apply to people of all ages, rather than specifically to older workers, although it recently carried out a tree planting ceremony in celebration of long serving staff across the Trust at which its Chief Executive said:

> 'The Trust emphatically values long service. Your collective wisdom and experience are extremely important. Seeing things in a historical perspective can help us understand better who we are and what we are capable of.'

The Maintenance Department employs a high proportion of older staff who have identified, amongst others, the following benefits of working for the Trust: attractive location and environment, working for a good cause, job stability, flexible working, being trusted by management and being respected for their expertise.

85% of the 540 paid employees are women and the Trust has a highly developed Family Support Programme, including an on-site nursery and flexible working options. However the **Director of Human Resources, Julia Mixter**, explains that its approach to flexible working extends to all employees and the Trust aims to accommodate the needs of older workers who may have increasing caring responsibilities for elderly relatives. Consideration is given to accommodating requests for time off for hospital visits and arrangements for emergency and compassionate leave.

The Trust's recruitment and management training includes a focus on avoiding age and other kinds of bias. Staff of all ages are expected to participate in its training and development programme, including its policy of 'growing our own' specialist staff. All paid employees and volunteers are expected to have personal training plans and training is organised so that part-time staff are able to take part.

The Trust has redesigned its Performance and Development Review system to be simple and straightforward and to emphasise the importance not only of what people do, but also how they do it, in order to embed the values of the organisation. It therefore provides a sound basis for addressing performance issues at whatever age. The Trust is currently reviewing its coaching for managers and will be considering the handling of later age issues as part of this review.

The Trust makes good use of older volunteers, the oldest being a 91 year old who helps with fundraising, a 90 year old who works in its shop and an 87 year old who does 'box counting'. It was the 10th organisation nationally to receive Volunteer England's Investing in Volunteers award.

## 2. CSV's LifeLines

CSV's LifeLines is a volunteer-led project to improve the health and wellbeing of isolated and vulnerable older people living in the Queen's Park, Kemptown, Tarner and Craven Vale areas of Brighton. The project supports older volunteers to develop and run community activities and to provide one-to-one support for older people to attend medical appointments and get out more.

CSV's LifeLines also has a pioneering partnership with the local authority and Hanover Housing Association, provider of a local extra care housing facility, Patching Lodge. This facility includes a community space where older volunteers run activities attended by residents and older people from the local community: a model which Hanover and CSV now plan to replicate in other parts of the country. From having no presence in Patching Lodge, in its first two years the project supported 24 volunters to lead 16 different activities for older people.

The project is managed by Community Service Volunteers (CSV) through its Retired and Senior Volunteer Programme (RSVP) which involves 17,000 volunteers nationally and supports older people to share their skills and increase their roles in the community. RSVP's website describes the national programme as follows:

> "RSVP is unique. Projects are organised and led by volunteers so there are no limits; opportunities with RSVP are as diverse as you are. If you have the passion, energy and enthusiasm, you can make things happen in your community. The only limit is your imagination! Across the UK, retired and senior volunteers drive older patients to hospital appointments, read and share skills with school children, knit teddies and blankets for children who've suffered trauma, research and record local history, befriend isolated older people and much, much more besides."

CSV's LifeLines has 5 paid staff (3 part-time) and a paid consultant, half of whom are around or over the age of 50. LifeLines benefits from CSV's national employment policies and what its **Manager, Anna Richmond**, describes as CSV's 'open and inclusive ethos'. Recruitment is designed to reach people of all ages and backgrounds. Paid staff have annual appraisals and regular supervisions and managers are trained in formal capability procedures (although these are rarely needed). The paid workers' primary roles are to 'empower and enable' the volunteers and to project manage volunteer support services (as opposed to the community activities which are volunteer-led). They also provide training for volunteers e.g. on safeguarding or falls prevention.

There are many more volunteers than paid staff – currently 46 volunteers involved in projects and 51 knitters: a volunteer/paid ratio of around 20:1. As part of RSVP, CSV's LifeLines 'celebrates and values older people'. Most volunteers are in their 50s and 60s but some are in their 80s and 90s. For specific volunteer positions, such as one-to-one support, roles are clearly specified in advance. However, for activities in the community, volunteers are invited to consider what they would like to contribute based on their interests, experience and skills. In this way, volunteers are encouraged to 'design and develop their roles over time'. For example, two volunteers had the idea of setting up a memory group a couple of years ago and have since developed their own facilitation methods in which they now train other volunteer group leaders.

Anna's recipes for success in developing and sustaining older volunteer-led community activities are:

- Use a range of ways of attracting volunteers but particularly word of mouth through existing volunteers and members of activity groups.

- When recruiting, understand the things which affect someone's ability to volunteer e.g. transport, financial constraints, ergonomic requirements.

- Put the volunteers at the centre, listen to them, ask them what they want to contribute and don't push them into things they won't be happy in.

- Support them to design the activities they want to lead based on their interests, skills and experience, to draw on ideas from members of their groups and further develop their activities over time.

- Provide structured support in the form of induction, essential ('light touch') procedures, guidance on the 'boundaries' of appropriate behaviour and training which responds to volunteers' needs (a current example being dementia training).

- Offer flexible advice and support, initially perhaps on a weekly basis but tapering down over time.

- Adopt a supportive approach if a volunteer's ability to lead a group diminishes e.g through changes in their health or personal commitments and, where appropriate, guide them into alternative roles.

## 3. Samaritans

Samaritans provides confidential emotional support 24 hours a day, 7 days a week to achieve its vision that fewer people die by suicide. Its headquarters is at Ewell in Surrey but its activities are organised through 201 local centres, and in prisons, across the UK and the Republic of Ireland. The centres each have individual charitable status but they operate within a unified strategy framework and set of values and policies. As against just under 100 paid employees at its headquarters, Samaritans has around 20,665 volunteers at its centres and in prisons: a ratio of 1 to 205. So it is therefore overwhelmingly led and managed by volunteers, with only a few of the local centres having any paid staff. This case study therefore focuses on volunteering rather than paid employment.

Volunteers are recruited locally but using standardised procedures and recruitment literature. The nature of the work means that 'resilience' is an essential requirement for the main volunteer roles, and recruitment criteria place a strong emphasis on candidates' life skills. Moreover, many candidates 'deselect themselves' in the course of an extensive nine month process of initial selection days, training courses and probationary work supported by a mentor. Volunteering normally involves four shifts per month with one of these being a night shift. This significant time commitment, together with the rigorous recruitment process and the emphasis on resilience and life skills, means that more than half Samaritans' active listening volunteers are over 50.

Not surprisingly **Chief Executive, Catherine Johnstone**, emphasises the value which Samaritans places on its volunteers. This can be measured by the fact that, against annual cash funding of around £18 million (raised centrally and by the local centres), the value of volunteering effort equates to more than three times this amount. Catherine explains that volunteers embrace the unified ethos of 'one strategy, one service for one general population' while, at the same time, identifying strongly with their local centres and communities which engender great feelings of 'camaraderie' and of 'being part of a family'. While some volunteers stay for 2-5 years, many stay for much longer, so that working with Samaritans 'often becomes part of volunteers' lives'. On this basis, and with the general extension of people's working lives, Catherine expects the average age of the volunteer workforce to increase over time.

Samaritans also operates active retention policies because, as Catherine says, 'we can't afford to lose good volunteers'. Recognising the mobility of the population from which volunteers come, Samaritans has recently introduced a system of 'passporting' to other local centres when volunteers and their families move to other parts of the country. Also, the standard shift pattern of four sessions per month can be flexed over longer

periods of, say, three months (making it easier, for example, for teachers to volunteer). Each volunteer receives at least five hours of 'On-going Training' each year and there are extensive mentoring arrangements. There is an emphasis on supporting volunteers to systematically build on their experience through a system of debriefing after every shift. There are opportunities to move up into 'senior volunteer' managerial roles in a three year rotation system, with people normally standing down again after their 3 year stint. A combination of these factors means that, while previously recruitment was just about keeping up with turnover, there has been a 9% net increase in active listening volunteer numbers over the past five years.

As with paid employees, there is no expected 'retirement age' for volunteers. However, the organisation has capability procedures in place to deal with situations where volunteers, of whatever age, are not meeting the standards for the service. These procedures deliberately adopt a supportive 'problem solving' approach, including mediation and mentoring, but with the potential for volunteers to be dismissed in the last resort.

Recipes for success identified by Catherine for recruiting and retaining volunteers include:

- Role descriptions: being absolutely clear about, and writing down, what volunteers will be expected to do.
- Selecting volunteers based on the requirements of the role: for example, if resilience and evidence of life experience are essential, recruit against these criteria even if that means an imperfect age, gender or ethnic balance.
- Continuous learning: supporting volunteers to systematically build on their skills and experience.
- Ensuring 'sufficient critical mass' to avoid placing too great a burden on individual volunteers.
- Having clear volunteering policies and guidelines, writing them down and sharing them.
- Ensuring that all volunteering opportunities are mutually beneficial to the volunteer and the organisation.

## 4. 3VA

3VA is the Council for Voluntary Services (CVS) which supports and develops the voluntary and community sector (VCS) in Eastbourne, Lewes District and Wealden in East Sussex. Its mission is 'confident charities that aspire and achieve'. It employs 26 paid staff and usually a similar number of volunteers: the actual number varies according to the extent of current project work.

3VA's current biggest project is to host the Volunteer Centre East Sussex (VCES), a countywide service providing support and advice for any group that engages volunteers, as well as assisting members of the public to find out more about volunteering opportunities in their local area. VCES has its main office in Eastbourne but also has a dedicated team of outreach workers covering each of the five districts, who act as local volunteering experts. These Volunteering Support Officers work with local organisations to identify their needs and to support them to work in line with best practice guidelines on volunteering. 3VA has also run a Community Volunteering programme with the fire and rescue service involving 60 volunteers.

As well as development support to the VCS and specific projects, 3VA has a variety of back office functions including human resources. It has a comprehensive set of employment policies, including strong policies on equal opportunities, which it sees as important not only for its own employees but also for its credibility as an adviser to other organisations. These policies draw on advice and documentation from Penisula Small Business Service.

3VA's policies and practices are 'age blind' but around half of the paid employees are over the age of 50, as compared with one fifth who are under 30. The **Chief Executive, Adam Chugg**, attributes this age profile, and the ability to attract valuable older recruits, to:

- A wide recruitment net and a real openness to recruiting people of whatever age (in contrast with some practice in the private sector).
- The nature of the work and the need for significant levels of expertise and experience for many roles.
- Flexible and supportive employment practices (including willingness to make adjustments for disabled people).

Job vacancies are advertised widely, including through 3VA's comprehensive database of local organisations. Shortlisting is done on an anonymous basis, excluding age and other personal characteristics. Hand-written applications are accepted and, although most roles do require ICT skills, training is available for this. Many of the paid staff are part-time, there are opportunities to work from home and staff can take leave for compassionate reasons or for family care. As a result staff turnover is low. Where project staff are on time-limited contracts, the annual appraisal process is used to review alternative employment options. Annual appraisals include looking a few years ahead. There is no expected retirement age but, where someone is approaching the state pension age, their own and the organisation's future needs are reviewed. There is a formal capability procedure but in practice this has not needed to be used.

Volunteers include 14 Trustees, 6 receptionists and a varying number in project teams. Volunteers are recruited and managed in line with the principles applying to paid employees but on a lighter touch basis, reflecting the fact that they are volunteers. For example, the recruitment process is simpler and involves less paperwork than for paid staff. There is a comprehensive Trustee Handbook which includes a clear description of the Trustee role and there are standard job descriptions for receptionists and events organisers. For one-off project roles, the aim is to be 'as clear as we can be about the nature of the role' in advance of the project starting.

12 of the 14 Trustees are over 50, reflecting the need for specific kinds of expertise but also the significant time commitment. 5 out of 6 receptionists are over 50, again reflecting the time commitment but also the suitability of the role for 'people who like to use their social skills'. There is greater age variety in events organisation and project work. In the project with the fire and rescue services, involving 60 volunteers, there was a greater than usual proportion of men and of younger people – reflecting the focus and image of the work. This has caused the organisation to consider how it might focus its recruitment efforts so as to encourage more younger people to volunteer for other roles.

## 5. VTCT

VTCT, an educational charity, is a Government approved awarding organisation offering National Vocational Qualifications (NVQs), Scottish Vocational Qualifications (SVQs) and other vocationally related qualifications (VRQs). With a head office in Eastleigh, Hampshire, the organisation employs 53 staff and has a field force of external verifiers working on a contract basis.

Of the employed workforce, half are under the age of 32 and a quarter are aged 52 and above. The organisation operates 'age blind' policies and practices. There are no age limits on job applicants (the organisation recently appointed a 58 year old) and a variety of advertising routes are employed. Application forms do not include age details. Sifting and shortlisting procedures exclude names, age, gender etc. The organisation avoids imposing excessive requirements for prior ICT skills.

Previously VTCT had a policy of enabling people 'running down' towards retirement to move on to flexible hours but now there is a general presumption in favour of flexible hours for employees of all ages, if the employee wants this and it is not against VTCT's business interests.

Employees of whatever age go on relevant customer services training and management training: the **Chief Executive, Stephen Vickers**, describes this as 'an expectation rather than an offer'. Similarly, ICT updating is a general requirement and the organisation has found that ECDL (the European Computer Driving Licence) provides a flexible framework to accommodate people with different learning speeds. ICT Champions are used to support staff to improve their skills.

There is no expectation of retirement at any particular age. The organisation has a rigorous system of regular performance reviews, and capability procedures, which have recently been reviewed and revised by the head of Human Resources. Each member of staff is required to have one developmental goal relating to their longer term career goals and this provides a basis for dialogue between managers and older staff about the latter's intentions as regards continued employment. Managers are encouraged to avoid making assumptions about people's career plans and ambitions but will, where necessary, challenge younger staff who need to 'raise their aspirations' or older staff who have become 'stale' in carrying out their roles and responsibilities. In practice, only two people have retired in the past 4 years and it has not been necessary to use the capability procedures.

## 6. Women's Pioneer Housing

Women's Pioneer Housing is a London housing association with 36 employees which prides itself on having an open minded approach to managing its workforce, including giving all its employees the right to apply for flexible working. Established in 1920, with roots in the Suffragette Movement, 80% of its current employees are women, 60% of the workforce is over 50 and one sixth is over the state retirement age. Just over one third of the employees work part-time. The **Chief Executive, Janet Davies**, says that competing with larger housing associations, which can offer more obvious variety and opportunities for advancement, 'makes our open minded approach a key factor in making our organisation good to work for'.

Janet Davies explained the organisation's approach to the Chartered Institute of Personnel and Development for the CIPD's *Flexible Working Provision and Uptake* report as follows:

> 'We have a flexi-time system that allows staff to accumulate time off. However, our main policy is a right to request flexible working for everybody. There are a disproportionately high number of women and older people in our organisation. The employee profile does not fit with the legislation stereotype (parents with young children). The legislation as it stands does not seem very sensible when one considers the removal of the Default Retirement Age and the increase in pension ages. We became aware that it wasn't right just to give the right to request to parents, because two or three people were regularly having to take time off for other types of caring responsibilities.'

Until the 2007 legislative change on flexible working, the organisation had worked within the legal requirements by responding only to the requests of parents of young children. When the provision was extended, it decided to extend the right to apply to all staff. This was for two reasons:

- There were some staff who were not carers of adult relatives in the sense of looking after their daily needs, but nonetheless had serious family responsibilities, and they were not covered by the legislation.

- Once a decision had been made to extend to this group, it seemed unreasonable to assume that family responsibility was the only compelling reason to wish to change working arrangements. Wanting to prepare for retirement or make serious commitment to study or voluntary work were no less

important to some other employees, and given that the organisation always wants to ensure its decisions make good business sense, it saw no reason not to take applications from anyone.

The organisation particularly had in mind situations where (usually older) employees had caring responsibilities for elderly dependents, perhaps at a distance from London or overseas, and where these staff were trying to manage the situation by dipping into their annual leave, with implications for their own stress levels and for operational performance. In practice, being open minded about who might apply has led to flexible working arrangements being agreed for some older employees for different reasons – e .g . to change their work-life balance, reduce the wear and tear of daily commuting or prepare for complete career change. Janet emphasises that, as a corollary of being open minded, it is important to be clear about business demands and to be prepared to put limits on flexible working where it might impede organisational effectiveness.

She also points out that, while good employment practices help achieve high staff retention rates, this can be a mixed blessing for a smaller organision if they stop it 'refreshing itself' through recruiting new people (of whatever age) with different experience and fresh ideas. She sees the removal of the Default Retirement Age as a challenge to organisations to address the age balance of their workforces and to sharpen up their performance review arrangements.

At Women's Pioneer Housing, alongside formal performance review, people are being encouraged to review their longer term career options. Janet sees this as helpful to the organisation for workforce planning purposes but also to individual employees, particularly in addressing the implications of having to work longer before becoming eligible for the state pension. And, with the fast-moving context for the organisation's work, she sees a need to challenge employees of all ages ('myself included') to be ready to update and aquire new skills.