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European Social Fund: Equality and Diversity Good Practice Guide. Age

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Equality and Diversity Good Practice Guide

Age

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European Social Fund: Equality and Diversity Good Practice Guide – Age

1.0 Introduction

The objective of the 2007–2013 European Social Fund (ESF) Operational Programme is to increase employment and reduce unemployment and inactivity, tackling barriers to work faced by:

- disabled people and people with health conditions;
- lone parents and other disadvantaged parents;
- older workers;
- people from ethnic minorities;
- people with low or no qualifications, and
- young people, particularly if not in education or training.

Background

The Department for Work and Pensions (DWP) European Social Fund (ESF) Division has commissioned this Good Practice Guide to identify and publish good practice from the 2000–2006 ESF and Equal Programme. As equal opportunities is a central aspect of the European Social Fund, the lessons learnt and good practice based on the Equal principles of equal opportunities and empowerment identified have been gathered together to inform the 2007–2013 Programme.

Who this guide is for

This good practice guide is aimed primarily but not exclusively at ESF Co-Financing Organisations (such as DWP/Jobcentre Plus and the Learning and Skills Council – LSC) that award ESF funding, and providers that deliver ESF projects.

The material will also be of interest to DWP policy divisions, ESF partners, equality and diversity organisations, devolved administrations, the European Commission and other Member States. The guide should also be of use to public bodies, projects and organisations that are developing strategies or delivering services to diverse communities.

Please note that this guide provides information and support that readers may choose to make use of. This does not mean that a provider or project applicant will be automatically successful in securing ESF monies.

Figure 1.1 Structure of the guide
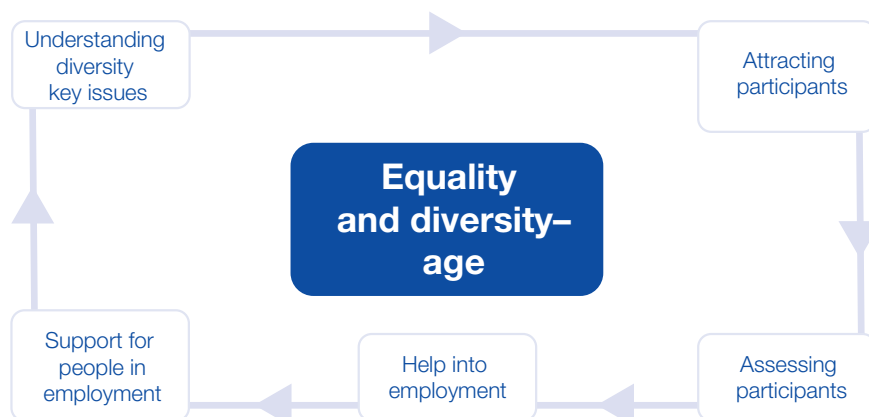
The guidance is structured in accordance with the main steps through which an ESF participant may pass on the journey from worklessness into employment and beyond. Case studies detailing how outcomes were achieved are included in each section.

Equality and diversity

Equal opportunities initiatives typically happen because the law has compelled organisations to create a 'level playing field' in the workplace or to ensure equal access to services. They aim to ensure that individuals, irrespective of their race, national or ethnic origin, gender, sexual orientation, religion or belief, age or disability can have equal access to employment and educational opportunities and the different services that organisations provide. The law plays an important part in ensuring that the 'rules of the game' are fair.

Diversity initiatives go further: They aim to take people's diverse characteristics fully into account to gain maximum benefit from their uniqueness as individuals. Consequently, it makes sense that treating everyone the same is not necessarily going to work. Different people will have different aspirations, expectations, opportunities, responsibilities and needs. Therefore, treating people fairly means recognising their differences, respecting them and acting accordingly. In short, diversity is about valuing difference and respect for people.

Since 2000 there has been a shift in emphasis with regard to the legal framework which underpins the rights of various groups. The Race Relations Amendment Act, The Gender Equality Duty and the Disability Equality Duty, have shifted analysis away from focusing on what a public authority is *not doing*, i.e. discriminating against a particular individual, to one which focuses more on what *they are doing,* i.e. promoting good race relations. Whereas the previous legal framework was dependent on individuals making complaints about discrimination, now it is dependent on public authorities demonstrating that they treat different groups fairly, challenge discrimination and promote inter-group harmony. More recently the Employment Equality (Sexual Orientation) Regulations, Employment Equality (Religion or Belief) Regulations and The Employment Equality (Age) Regulations have all ensured additional legal support to a wider cross section of individuals.

There has also been an increased recognition of inter-sectional discrimination: discrimination based on a combination of grounds. Factors such as age, gender, disability, ethnicity, religion and sexual orientation can interact to create intersectional disadvantage, often affecting the most disadvantaged members of society, for example ethnic minority women or older disabled people.

The diversity component of the equalities debate requires those providing public services and delivering public functions to reflect far more on the diverse nature of communities and groups. This has included recognition of issues of diversity within their user groups and placing a responsibility on providers to recognise, reflect and consult with the diversity of its local communities. Both recruitment and service delivery needs to be targeted and appropriate in order to reflect the diverse communities the project wishes to support.

Individuals and organisations therefore need to ensure they have the correct systems and resources in place to respond to the diverse needs of individuals as well as specific issues shared by equality target groups. This good practice guide demonstrates there are a range of projects which are not simply grappling with the emerging equality and diversity debates but also helping to shape it.

Although projects should react and reflect local circumstances there are common features that underpin successful approaches to equality and diversity, namely:

- a good understanding of equality and diversity, including the legislative requirements and the communities you aim to support;
- securing community buy-in to support the attraction of diverse participants;
- having a robust and fair approach to assessing and developing those participants;
- having the relevant processes and partnerships in place to support participants into employment;
- ensuring that ongoing monitoring and evaluation allows you to continue that support for those in employment.

What is good practice?

The term 'good practice' is often used to mean effective practice, practice that promises results or best practice, when in reality these terms all mean slightly different things to different people. Without establishing benchmarks and robust arrangements for evaluation, views about whether practice is good are essentially subjective. Good practice aims to remove all kinds of barriers to work, to provide a range of effective supports and activities, and to empower and involve participants. For the purposes of this guide, we have defined 'good practice' as approaches that are working well and can be replicated elsewhere.

The practical examples and case studies provided will help to evaluate each organisation's intentions and the impact that can be achieved.

2.0 Equality and diversity – age

Age diversity and European Social Fund

The ESF gives priority to several groups of participants, amongst them young people and older people both in and out of work. This guide is particularly focused on age and improving the employment prospects and skills of older people. The focus on age is deliberate and is meant to address issues relating to changing demography of the UK which, like other EU member states, has an ageing population.

Changing demographics

Societies are ageing in most European countries due to increases in life expectancy brought about by greater quality of life and advances in health care and low birth rates. As a result, the EU's statistical service, Eurostat, predicts that by 2030, the number of young people (aged 15–24) will decline by 12.3% and the number of young adults will fall by 16% in Europe. Accordingly, the main age groups likely to grow in size are 55–64 year olds, by 15.5%, whilst the 65–79 year olds are set to grow by 37.4%.

In many countries and sectors, the decline in young people entering the labour market has already led to recruitment difficulties and skill shortages. Consequently the need to attract or retain older workers in employment becomes increasingly important. In the UK, the Government has recognised the need to encourage about one million older workers to remain in or re-enter the workforce. Policies have been developed as part of the proposed changes to support the up-skilling and retention of the ageing workforce.[1] Key proposals include:

- improving back to work help for the over 50s through a flexible New Deal and improved back to work support for Jobseeker's Allowance;
- improving training opportunities for the over 50s by ensuring that inactive older people have the basic skills needed to sustain and progress in employment;
- improving recruitment and retention opportunities for the over 50s via employer intervention.

Age legislation in the UK

The Employment Equality (Age) Regulations 2006 came into force on 1 October 2006 and aim to tackle age discrimination in the workplace for both young and old. Key aspects of the legislation include:

- improving access to employment and vocational training, including better access to help and guidance, and reviewing current practices in recruitment, promotion, development, retirement and levels of pay;
- recognising people of all ages;
- new obligations for all employers, providers of vocational training, trade unions, professional associations, employer organisations and trustees, and managers of occupational pension schemes, to consider;

[1] On 13 December 2007, the Government published 'Ready for work: full employment in our generation' setting out the steps to be taken to reach the goals of 80% employment rate and working people with world-class skills.

- the removal of upper age limits for unfair dismissal and redundancy;

- the introduction of a national default retirement age of 65, making compulsory retirement below age 65 unlawful (unless objectively justified) – this will be reviewed in 2011;

- all employees having the 'right to request' to work beyond the default retirement age of 65 or any other retirement age set by the company, and all employers will have a 'duty to consider' requests from employees to work beyond 65.

Unlike other aspects of equality law, goods, facilities and services are not included in these regulations.

Key facts on age and diversity

By 2027 the UK population aged 50 to 69 is predicted to reach 15.8 million. In 2007 it was 13.3 million. Projections in the proportions of older people from ethnic minority groups are not available.

The employment rates for older workers (50 to 69) in Great Britain have increased. Trends in employment rates for people in the UK aged 50–69 compared to those aged 16 to State Pension Age (SPA) shows that the gap between these groups has decreased. For example, in 2006 the employment rate for those aged 50–69 was 55.2% compared to 81.6% for those aged 25–49.

The employment rates of older workers vary widely across the regions of England. For example, in 2006, employment rates among older workers in the North East and North West (including Merseyside) was 62.1% and 67.6% respectively, those for the South East and South West were 76.5% and 75.1%.

Part-time work is increasingly becoming important for older people. Females are generally much more likely to work part time than males, but the proportion of employed males working part time increases significantly as age increases (after reaching 50), particularly after reaching state pension age.

At the EU level, the UK employment rate for older workers (55 to 64 years old), according to Eurostat data, is 56.9% compared with an EU Lisbon target of 50% and the current EU average of 42.5%. However future projections show this will not always be the case.

There are much lower proportions of older people from ethnic minority groups, than for white people. For example, 24% of white people in Great Britain are aged 50–69 but for ethnic minority groups, only 12% are aged 50–69.

Older people have significantly lower formal qualifications than the rest of the workforce and about 20% of those aged 50 to state pension age have no qualifications compared to about 10% below this age. For various white groups, the 46+ age group is the single largest group without qualifications.

78% of white female part-time disabled employees over 46 years old do not have a qualification. Around 60% of white female, full-time non-disabled employees do not have a qualification and 74% of white disabled full-time employees over 46 are without qualifications.

Source: DWP Report 'People on the border between work and retirement', 2008.

Health and disability

Evidence from OECD[2] suggests a close link between employment outcomes and disability for older people. In the UK, older people, particularly men in their early 60s, are more likely to be economically inactive because of disability. Older workers who are not disabled have very similar employment rates to non-disabled prime age workers, however there is a significant decline for older disabled people. Furthermore, the OECD source shows that the disadvantage faced by disabled people increases for older groups. For example, while the employment of prime age disabled people is 71% of that for their non-disabled participants, the ratio worsens for older groups, and is just 52% for those aged 60–64.

[2] Ageing and Employment Policies: United Kingdom. Organisation for economic co-operation and development 2004.

3.0 Recruitment – attracting participants

Experience has shown that gaining commitment and buy-in from a target group or community is the essential first step to engaging with participants from diverse groups. A community consists of a number of sub-communities, based on a combination of ethnicity, gender, age, disability, location, etc. Each community will have different desires and needs that have to be weighed up.

It is possible to engage with communities in a variety of different ways but it is extremely important to understand the environment in which you are operating, the type of engagement each group prefers, and to then be able to deliver services in a way that benefits individuals, communities and providers.

Only by genuinely engaging with local people can we develop services which meet local needs and aspirations. Listening to the experiences and ideas of the people that services are targeting is the only way to deliver services that can make a lasting difference. Consultation of service users, employees and other stakeholders form one of the specific duties of engaging with diverse groups. Such consultation provides a vital source of useful information for organisations to use when developing their age and diversity plan.

Attracting participants

The following points highlight some practical first steps to take in developing engagement to attract and recruit older participants:

Commitment: Demonstrate a genuine commitment to working with communities. The first step is a good understanding of the needs and requirements of older participants. Providers should already have a good idea of how policies and practices affect age and diversity when delivering services to participants.

Outcome focused: Providers should have clearly thought through what they want to achieve and why they are focusing on this target group. Set out the objectives in an age diversity plan, and demonstrate how activities will benefit the older participants themselves.

Involvement: Providers and co-financers should ensure all staff are fully on board and committed to meeting objectives. Ensure staff at all levels fully understand the business benefits of attracting older participants as well as any legal requirements.

ENGAGE Equal Development Partnership

Working in the community

This project piloted methods of reaching learners in a wide range of community settings. The project led the Adult Education Service to act as a broker and facilitator of learning via other agencies and by direct delivery in the community. It employed a number of basic skills tutors so that learning needs could be addressed quickly. It also refined the role of the Community Development workers to ensure community organisations were consulted and well-supported. Many participants over the age of 50 were deliberately targeted and recruited to attract people in the same age category to tackle age-related misconceptions about learning.

Planning: Ensure there is a well-researched and evidenced strategy in place. At the outset gather evidence of the needs and requirements of older participants and use this evidence to agree the purpose, scope and timescale of the engagement and the actions to be taken. Use older people/representative groups themselves in the planning and development phase to ensure the information gathered is accurate.

Flexible approach: Engage older participants at levels they can best relate to, rather than expecting communities to relate to your organisational structures and processes. Flexibility is key – building arrangements to enable caring and work responsibilities to be combined.

Independence: Recognise that the most effective representation of community interests is likely to be via community and support bodies which are independent and accountable to the relevant community.

Communication: Communicate with communities in ways they can best relate to, including use of formats such as large print, Braille and languages other than English if required. Avoid assumptions – research and understand the audience and decide on the approach to be adopted.

Managing expectations: Be open and realistic about what can and cannot be achieved by engaging with communities. This includes managing the expectations of the organisation but also of the participants targeted for engagement.

Sustainability: Dipping in and out of community activity will not be of any benefit to the target communities. Long-term strategies that empower both the organisation and the participants are required. Sustainability is key.

Variety: There are a range of ways to engage and involve communities and in reality there is no 'one size fits all' approach. Engagement will vary from dealing with single issues to ongoing consultation with the participants.

Partnership working: Acknowledge that other organisations will also want to support or engage specific target groups and so look at opportunities for partnership working with other organisations/stakeholders. Think through how best to work together in a way that benefits the communities and your organisations most effectively. Ensure that relevant information is shared and learn from each others' experiences. Also look at how resources can be shared.

Continuous learning: Keep an account of what work is being undertaken with whom. Map all existing levels of community activity and, using the contacts made, draw up community profiles. Carry out community needs assessments to truly understand what is required. This will include identifying any barriers to engagement that exist and working out how these should be addressed, for example, through training and development work among staff or support for community groups or representatives.

Feedback: Make sure feedback is given to all involved communities and stakeholders on an ongoing basis on what has been achieved and lessons learned.

Impact assessment: This is a way to ensure that the impact on older participants of policies or procedures, strategies, functions and services are thought through. If the opportunities offered do not meet the needs of older participants use this information to make the changes needed.

Monitoring and evaluation: Monitor and evaluate all activities undertaken and look at what works and where progress is slow or activities are proving less effective than hoped. Work out possible alternative approaches.

Building new and worthwhile relationships can be extremely challenging. It requires perseverance, determination and creativity – but the end result is worth it.

Checklist

The following steps can enable a truly inclusive approach to attracting participants:

O Do staff understand the obligations and business benefits of engaging participants and the legislative requirements?

O Are staff engaged in the project?

O Have all local contacts been researched and contacted?

O Are systems in place for relevant community and support groups, stakeholders and older participants themselves to engage in the project?

O How has this been evidenced?

O Has a realistic action plan and timetable been developed for this activity?

O Are the project's objectives and targets directly relevant to older participants?

O Have participants been involved in the start-up of the project?

O Has a realistic budget has been allocated for community engagement activity?

O Has an impact assessment, partial or full, been undertaken?

O Are appropriate monitoring and evaluation plans in place?

4.0 Assessing the needs of older participants

Gathering information for an assessment is the first step in planning appropriate goals and objectives.

An assessment should be an ongoing process through which information is gathered about participants' strengths, interests, abilities, developmental needs, psychological, social and emotional development, over a period of time. It requires looking at how a participant functions in different environments. The assessment process will differ for each participant depending upon their needs.

Because an assessment is an ongoing process, and the information gathered should be used for planning appropriate services and supports, it is essential that the right information is sought from the outset.

Communication

Assessing the needs of older participants requires the same skills as any other assessment, but with an understanding of the needs and specific requirements of older participants. Older women seeking to return to the workplace due to care or childcare responsibilities finishing will have to be assessed with this context in mind. The assessment should be based on the principles of a person-centred approach which is open, honest and respectful.

As with all assessments the most important factor is for assessors to develop good communication skills that enable them to:

- use down-to-earth, everyday language, avoiding jargon;
- be a good listener, able to identify underlying meanings;
- use prompts, to encourage older participants to focus on identifying positives;
- allow the person to take the lead in conversation rather than using direct questioning;
- take time to build a relationship with the person being assessed.

Assessing older participants

Confidence: Participants must feel that the process is a positive experience, which helps them to grow in confidence and feel more able to move towards employment. It may be some time since they have tried for a new job, and confidence in their skills and abilities can be very low, which needs specific techniques to build self-esteem in the current job market. In contrast older workers previously in highly skilled jobs may have unrealistic expectations of what is available to them in the labour market. Therefore a different approach may be needed.

Trust: The assessor needs to focus on building a relationship and develop a sense of trust with the older participant. Confidence may be an issue and so the assessor will need to play a key role in providing support through continuity and acting as the single point of contact. The purpose of the assessment is to support the individual. They need to be clear about this and that it is not a value judgement.

Action planning: The older participant should be encouraged to work with the assessor to develop a personal action plan which includes both realistic and aspirational outcomes. The action plan needs to include an ongoing system for monitoring and evaluation of progress over time. This will also allow the plan to be modified as needed.

Motivation: Life experiences need to form a core part of the assessment process. Many older participants do not have extensive educational experience and so focusing on life experiences and achievements outside of the educational system will allow the participant to focus on what they can do rather than what they cannot.

All encompassing: Assessments must be broad and cover a range of topics – including education, employment and lifestyle to understand learning needs and barriers and therefore ensure the right support is offered.

Two-way communication: Feedback about progress, suggestions about what support package is appropriate to their needs, and why this is the case, should be a core part of the assessment process. Allow for ongoing feedback both during and after the assessment.

Outcomes: The assessment should be outcome-focused. A multi-agency approach should be adopted and the assessor should look to involve partners and support agencies to deliver a more tailored approach.

Maximising potential: Avoid stereotyping. The assessor needs to work with the participant to understand the individual's learning and development needs. Identifying how the participant learns best rather than having a 'one size fits all' approach will allow for a more effective development plan to be put in place.

Appropriate support: Make support and training as accessible as possible for older people, and offer the participant development and learning opportunities at a time and location that suits them. Note that accessibility will vary depending on the learning and/or developmental situation of the participant. For some participants, accessibility will require offering full opportunities whilst other participants such as disabled people may require physical access to training facilities. For many older participants it may be a long time since any development/learning was last undertaken and so ensuring the environment is appropriate and non-threatening will be key.

The key to working successfully with older participants is ensuring a flexible and bespoke approach to the learning and development needs of the participant. Avoid trying to mould the participant into a set type or group and instead look at how services can be developed and moulded around the needs of the individual.

Checklist

The following steps can enable a truly inclusive approach to assessing the needs of older participants:

○ Are all staff involved in participant assessments fully trained and do they have a clear understanding of diversity issues, including the legal requirements relating to the target group?

○ Has a participant's action plan been implemented?

○ Are partnerships and multi-agency links in place to ensure external support can be adequately assessed?

○ Does each assessment focus on the needs of the participant and include an education, employment and lifestyle perspective?

○ Is there a clear, transparent and flexible approach to assessment?

5.0 Helping older participants into work

Myths and stereotypes

Age discrimination is usually the result of assumptions made about young and older employees or prospective employees that are based on inaccurate, outdated, and inappropriate stereotypes. Stereotypes can involve intersectional discrimination, integrating inaccurate ideas about gender with those about race or religion, for example. These attitudes work against the interests of the individual and employers. Employers have a key role to play in avoiding discrimination on the basis of erroneous stereotypes.

Ageing does result in change, but variation in performance within a specific age group far exceeds the change in performance associated with ageing. In addition, older participants have accumulated experience that is extremely valuable in contributing to business success. There is no real evidence to support the popular misconception that work performance declines with age. Research shows that older workers are known to perform more consistently and to deliver to a higher quality, often matching or outstripping the performance of younger participants.

Older participants can use this knowledge, skill, experience, anticipation, motivation and other strategies to maintain quality performance. Older participants also bring the added benefits of experience, making them more conscientious, loyal, reliable and hard-working with well developed inter-personal skills. Where older participants are less able, training and support should help to overcome this.

Older participants may have longer absences from work due to illness (as common medical problems increase with age), but research has shown that this may be offset by a tendency to fewer short-term spells of absence (which are often more disruptive). Older participants do not, overall, have more absence from the workplace than workers of other ages. In addition, lower levels of staff turnover in the older age groups has financial benefits in reduced recruitment costs, and better returns for employers investing in staff training initiatives.

SWOOP Equal Development Partnership
Focus on skills

This project aimed to reduce the impact of changes associated with the UK's ageing population by influencing employers in recruitment and retention policies for older workers. Its prime goal was to challenge the preconception that people over the age of 50 are no longer effective workers. Its key objectives were to influence Small and Medium sized Enterprises (SMEs) in the recruitment and retention of older workers by identifying hidden competencies and enabling older workers to influence potential employers by providing evidence of their individual competencies. In conjunction with local partners the Development Partnership conducted a series of awareness seminars throughout the region. These focused on understanding the changing UK demographics and demonstrated the business case for recruiting and retaining older workers.

Employers

Providers have an important role to play in working with both employers and older participants. Employers need to be aware of the needs and requirements of the individual or legislative requirements and to ensure that, where possible, their work practices are not causing the disengagement of older participants.

Being an employer of choice means understanding what potential employees want from their employer. Understanding an individual's needs and requirements will enable an organisation to decide whether the opportunities it offers is right for the groups it wishes to attract.

Remember that employment decisions based on assumptions rather than proper appraisal are never justified because:

- having a preconceived notion of what age, race, gender, disability, sexual orientation or religion and belief are appropriate for a job are never genuine criteria for employment;
- age, race, gender, disability, sexual orientation or religion and belief should not be used as predictors of performance;
- physical and mental ability is not solely linked to any single identity, personal or lifestyle choice.

The Employment Equality (Age) Regulations 2006 set out the following guidance for employers to ensure that recruitment and development opportunities were fair to applicants of all ages:

Recruitment: Job and person specifications need to match the requirements of the job. Organisations should avoid requirements that could exclude people on the basis of age. For example, not specifying a set number of years work experience unless it is truly needed.

Specifying age: Job advertisements that specify ages are, in most cases, unlawful, for example specifically asking for 18–21 year old applicants where there is no job need. Employers are asked to avoid language that may deter people in certain age groups from applying.

Interview and selection: Organisations need to ensure that staff that are responsible for shortlisting, interviewing and selection are not basing their decisions on any age biases and assumptions. Clear guidance and training, alongside a proper consideration of the required skills and abilities for the job, are essential.

Equality of opportunity: Ensure that all staff are equally offered the same opportunity and encouragement to participate in promotion and developmental opportunities. In some cases this may mean actively encouraging groups who do not come forward.

Positive action: If organisations want to positively encourage older applicants to apply to their organisation they can legally do so. However, attracting older applicants is allowed but shortlisting or recruiting based on age alone is not permitted in law and all applicants would need to be objectively assessed.

OWEN Equal Development Partnership

Working with employers

Staff worked with small companies in the Yorkshire and Humber region to develop tool kits and organise seminars to recognise the benefits of employing older workers and developing their skills as part of the workforce. This was supplemented by developing an information pack on how to retain older workers and utilise their skills by looking at options such as flexible hours to enhance work-life balance, job sharing and recognition of life skills accreditation.

Support for participants

Choice: Look at opportunities that allow for social integration, and a good supportive work culture that values experience and life choice.

Flexibility: Organisations offering flexible working opportunities can be better suited to the needs of older participants and therefore offer older participants the widest range of opportunities, including self employment and flexible working.

Pay and conditions: Ensure that older participants are able to benefit from the same pay and working conditions as all other staff. Conducting an equal pay review within the organisation is the best starting point for all organisations when doing this.

Work placement: Where possible explore work placement opportunities for the older participants prior to placement to allow both the organisation and the employee to gain an insight into the role and its requirements.

Barriers: A key focus needs to be on identifying barriers that exist for older workers and developing solutions to remove these barriers.

Work readiness: Older people need to want to work, as well as be ready to work. It may be that some older participants have been away from the job market for a length of time, so easing them back in at a pace that suits them is very important. Processes need to take the individual's requirements into account. Motivation and commitment on both sides is needed to ensure that the participant is prepared and committed to move forward.

Open door policy: There needs to be an open door policy that allows the participant to be open and honest about their experiences. If an opportunity does not work out for any reason the individual needs to know that they can learn from the experience and review alternative options.

Checklist

The following steps can enable a truly inclusive approach supporting older participants into work:

○ Is the organisation aware of the Employment Equality Age Regulations 2006 and its requirements?

○ Is information and support available for employers to ensure they understand what is required for them under the Age Regulations?

○ Are older participants fully aware of all job-related opportunities available to them?

○ Are older participants encouraged to seek job and learning opportunities that meet their specific requirements?

○ Are partnerships in place to ensure that if external support is needed it can be accessed?

6.0 Supporting older participants in work

Support in the workplace should be discrete and sensitive. Employees rarely like to be singled out or made to feel needy or overly dependant on others.

Training and mentoring

Offering mentoring and development opportunities to older participants will ensure constant awareness of staff needs and their ongoing requirements. Learning and development should be seen as beneficial to all staff, equally. All individuals, regardless of age, should be given the same access to development opportunities.

Structure: Having mechanisms in place for appraising, motivating and developing staff will support retention and, in the long term, lower the cost of recruitment.

Mentoring: Mentoring can be an extremely effective way of nurturing staff within the organisation and encouraging individuals to work as a team and learn from within. Mentoring is an effective way of promoting the transfer of skills, knowledge and experience and can be of use to both the mentee and the mentor involved.

For the mentee, mentoring:

- clearly demonstrates how the organisation values them;
- offers an objective, supportive, non-threatening source of help and support whilst developing and learning;
- offers improved opportunities for personal and career advancement;
- offers access to someone with an understanding of the organisation's culture, personnel and ways of working.

For the mentor, mentoring offers:

- increased job satisfaction, and a sense of value and status;
- an active role in performance and policy implementation;
- greater self awareness and wider experience in change management;
- the opportunity to help and guide others in their career development;
- potential to develop and refresh leadership knowledge, skills and qualities.

Confidence: Mentoring can be extremely useful when looking to develop the confidence of older participants, both as mentors and mentees. Where possible older participants should be offered a mentor of a similar age, as it will allow the participant to recognise what opportunities exist for older participants.

Support networks: Developing diversity support groups will allow participants to network and engage with others, to share experiences and talk through development and training opportunities that they may have experienced.

Organisational learning: Organisations should be encouraged to network and share experiences with other like-minded organisations to learn from good and bad practices undertaken elsewhere.

Policies and action plans: Organisations should be encouraged to have clear and transparent policies relating to recruitment and development of all staff. Organisations should be encouraged to monitor and record achievements and to then share that information with all staff.

Communicating commitment to diversity: Organisations should communicate with staff and stakeholders the business benefits diversity offers on an ongoing basis. Marketing the organisation as diversity-friendly makes financial sense as part of the wider business case; it illustrates the organisation's compliance with the law and it demonstrates a commitment to social responsibility.

> **Prime Advantage Equal Development Partnership**
>
> **Training and development opportunities**
>
> This project, led by the Centre for Learning, secured placements for participants aged 50 and over to access short-term work-placed experience. The project provides support to the individual and the business concerned to minimise the workload of existing staff and is able to draw on the experience to refine its learning and develop the skills of the participants.

Ongoing development

Good employers always invest in their employees. Wasting this asset by losing workers or allowing the situation to deteriorate by not investing in training for older members of staff would be a strategic error. All staff should know about promotion and training opportunities and these opportunities should be open to everyone on a fair and equal basis. It is important to operate transparent and consistent systems for appraisal and performance management processes. There need to be clear paths to accessing promotion and training opportunities for all employees. Ensure there are mechanisms in place for appraising, motivating and developing staff to ensure staff are retained with the skills that the organisation needs.

Ensuring that the training style is appropriate to staff needs is also important. Training needs to be based on individual needs. For staff new to the role or sector, mentoring, shadowing and training go hand in hand. There may be scope to involve partners and stakeholders and where possible use those links if appropriate to deliver the mentoring and training.

Support

Many older workers can be classified as disabled people and will have a right to reasonable adjustments under the Disability Discrimination Act. Even where they are not, good practice and good age management requires consideration to requests for adjustments – introduce them where the request is reasonable. The sorts of adjustments that can be required include physical changes to the workplace or changes to policies and practices. It can also include changing the height of a door handle, keeping aisles clutter free, putting handrails up staircases etc.

Ways to support personal development include providing:

- opportunities for job shadowing;
- career advice and career planning;

- targeted development courses;
- introduction of competency-based performance management;
- targets for access to training.

Best practice is to make sure that work stations, equipment and practices are accessible to as wide a range of workers as possible, including older and disabled members of staff. As with all areas of work, ensure ongoing monitoring and evaluation is in place. The company should keep a record of training provided and who it is accessed by.

Work-life balance

The campaign for work-life balance is as important for older workers as it for those who need to share their time between work and family. Flexible working arrangements that allow older workers to move to reduced hours or partial retirement may actually help many to stay in employment until much later in life. The Trade Union Congress has developed policy initiatives that might help create greater flexibility.[3] These include:

- requiring employers to survey their employees to establish the age profile of their workforce, and then consider with those workers and their representatives what policies would help workers to remain in employment for as long as they would want ideally;
- extending to all employees the right to request flexible working arrangements – this would challenge the assumption that flexible working is only for women, and enable workers coming up to retirement to 'downshift' gradually;
- right to retraining for older workers, with paid time off work to learn new skills;
- DWP advice on retirement planning, offered periodically, starting several years ahead of state pension age;
- a new idea called 'slivers of time' – a web-based service bringing together people who can only be available for work at irregular times and organisations who need extra workers unexpectedly or for peak periods;
- partial retirement – the ability to move to reduced hours, and supplement lower wages with part-time pension. Finland and Sweden have introduced part-time sick pay for workers suffering from long-term ill health.

Checklist

The following can enable a truly inclusive approach to supporting older participants when in work:

O Does the organisation have a clear recruitment, retention, progression and training policy?

O Do all recruitment policies, procedures and practices meet the terms and objectives of the organisation's equal opportunities policy and action plan?

O Are training opportunities made available to all staff?

O Has the training offered been piloted and tested with a diverse range of staff?

O Does the organisation have mechanisms in place to support a diverse range of staff?

O Does the organisation have a work-life balance strategy in place?

[3] Ready, willing and able – employment opportunities for older people. TUC (Undated)

7.0 Monitoring and evaluation

It is worth pointing out that monitoring provides one of many ways of enabling equality policies to be assessed for effectiveness (impact assessment) generally and in respect of each and every minority group. For a more effective assessment of policies that will allow you to measure and improve services and also to identify and remove any possible barriers, monitoring should be undertaken alongside consultation and stakeholder involvement, identifying aims and objectives etc.

Throughout this guide, we have highlighted the need to apply recommended and relevant tools that will help embed monitoring and evaluation systems to ensure an accurate assessment of activities. Monitoring and evaluation needs to be built into every stage of activity. Monitoring equality practices requires collating, analysing and acting on data collected and can be used to:

- highlight possible inequalities;
- investigate the underlying causes of those inequalities; and
- help develop mechanisms to redress any unfairness or disadvantage.

In employment, monitoring allows an understanding of the make-up of the workforce and provides an invaluable insight into who is applying and, of those applying, who has been successful.

Monitoring can provide an insight into which groups are using services, and how satisfied they are with them. It is possible to collect information on provider performance, monitor compliance, set improvement measures and monitor progress on them. Based on the monitoring data received back and the action taken, it is possible to deliver services far more effectively; for example, by considering mechanisms to reach groups under-represented in the workforce, or making sure that services are relevant to the diverse needs of customers.

Without monitoring, it is difficult to really know whether policies and services are working. This could, in turn, result in the policy being seen as paying lip service to equality, and therefore of little value. Such an approach will risk losing credibility and commitment from the teams which have to deliver it, as well as the people who are affected by it, without evidence that policies work in practice.

Monitoring also enables equality policies to be assessed for effectiveness (impact assessment) – generally and in respect of each and every minority group. This information then allows one to measure and improve services and identify and remove any possible barriers.

Annex One: Glossary

Adverse impact

This is a significant difference in patterns of representation or outcomes between different equality strand groups, with the difference amounting to a detriment for one or more groups.

Ageism

Discrimination against people based on assumptions and stereotypes about age.

Best value

This refers to the process outlined in the Local Government Act 1999, which requires local authorities to secure continuous improvement in the delivery of services.

Black and Minority Ethnic (BME)

Term currently used to describe a range of minority ethnic communities and groups in the UK – can be used to mean the main Black and Asian and Mixed racial minority communities or it
can be used to include all minority communities, including white minority communities.

Community or social cohesion

A Government initiative, developed in response to the disturbances in 2001 in the north of England, which gives local authorities a leading role in helping to realise a 'common vision', a sense of belonging, and positive relationships between people from different backgrounds among the elements that help create cohesive communities.

Consultation

Asking for views on services or policies from service-users, staff, decision-making groups or the general public. Consultation can include a range of different ways of consulting such as focus groups, surveys and questionnaires or public meetings.

Disability

The legal definition for the purposes of the Disability Discrimination Act 1995 is 'physical or mental impairment which has a substantial and long-term effect on an individual's ability to undertake normal day to day activities'. However this definition sees people under what is known as the 'Medical Model of Disability'. By contrast the 'Social Model of Disability' views disability as caused not by impairment but instead by the way in which society fails to meet the needs of disabled people. Any attempt to apply the social model should take into account the fact that some disabled people will themselves use the medical model – sometimes unaware of the social model.

Direct discrimination

Treating a person less favourably than others are, or would be, because of their race, ethnic origin, gender, disability, age, religious or other belief, or their sexual orientation.

Discrimination

Treating an individual or group differently and less favourably than others under comparable circumstances. It may be based on a person's race, ethnic origin, gender, disability, age, religious or other belief, or their sexual orientation. It may be unlawful and can include harassment.

Diversity

Appreciating diversity goes beyond the mere recognition that everyone is different; it is about valuing and celebrating difference and recognising that everyone, through their unique mixture of skills, experience and talent, has their own valuable contribution to make.

Diversity proofing

Ensuring your practices are in no way compromising or having an adverse impact on equality and diversity.

Equalities

This is a shorthand term for all work carried out by an organisation to promote equal opportunities and challenge discrimination, both in employment and in carry-out functions and delivered services.

Ethnic monitoring

The process of collecting and analysing information about people's racial or ethnic origins to see whether all groups are fairly represented.

Impact assessment

An impact assessment is simply a tool/process that enables you to check how an existing service or policy or a new service or policy affects groups of people covered by equalities legislation. It allows you to look at evidence or consult as to whether the service or policy is discriminating (actual or perceived to be) against a particular group of people.

Indirect discrimination

Applying a rule or criteria to everyone which:

Cannot be met by people from a particular group **and** is to the disadvantage of the group **and** cannot be justified on non-discriminatory grounds. All three conditions must be met.

Racial group

Racial groups are defined by racial grounds, that is race, colour, nationality (including citizenship), or ethnic or national origins. All racial groups are protected from unlawful racial discrimination under the Race Relations Act. Romany Gypsies, Irish Travellers, Jews and Sikhs have been explicitly recognised by the courts as constituting racial groups for the purpose of the RRA. A person may fall into more than one racial group: for example a 'Nigerian' may be defined by race, colour, ethnic or national origin and nationality.

Reasonable adjustments

Employers have a duty of making reasonable adjustments in respect of disabled candidates or staff, and those delivering services must consider adjustments to meet special needs of disabled customers and clients.

Service Level Agreement (SLA)

An SLA is a formal negotiated agreement between two parties. It is a contract that exists between customers and their service provider, or between service providers. It records the common understanding about services, priorities, responsibilities, guarantee, etc. with the main purpose to agree on the level of service.

Sexual orientation

A term describing a person's attraction to members of the same or different sex. Usually defined as lesbian, gay, bisexual, or heterosexual.

Stereotypes

Generalisations concerning perceived characteristics of all members of a group.

Annex Two: Useful contacts and resources

General

Campaign for Learning: The Campaign for Learning works to create opportunities and provide support for learning in families and communities, workplaces and schools that lead to positive change. www.campaign-for-learning.org.uk/cfl/index.asp

DG Employment, Social Affairs and Equal Opportunities: This Directorate-General has the task of contributing to the development of a modern, innovative and sustainable European Social Model with more and better jobs in an inclusive society based on equal opportunities. It plays a key role in promoting positive interaction between economic, social and employment policies, bringing in the main players who can help to achieve the EU strategic objective to make Europe the world most competitive and dynamic knowledge-based economy, capable of sustainable economic growth, with more and better jobs and greater social cohesion. ec.europa.eu/dgs/employment_social/index_en.htm

Employment and Training Links Ltd: Works with disadvantaged individuals in Yorkshire and the West Midlands to support individuals and assist them to access training and work opportunities. www.employment-training-links.co.uk

Equality and Human Rights Commission: Information about individual rights and advice for employers and professionals.
www.equalityhumanrights.com/en/Pages/default.aspx

Higher Education Funding Council for England: Working in partnership, the Higher Education Funding Council for England (HEFCE) promotes and funds high-quality, cost-effective teaching and research, meeting the diverse needs of students, the economy and society. Widening access and improving participation in higher education forms one of the Council's strategic aims. www.hefce.ac.uk

Jobcentre Plus: A Government agency supporting people of working age from welfare into work. It aims to help economically inactive people move into employment and to help people facing the greatest barriers to employment to compete effectively in the labour market and move into and remain in work. www.jobcentreplus.gov.uk

Learndirect: learndirect operates a network of online learning centres providing access to e-learning opportunities available to adults wanting to improve on existing skills or learn new ones, and to employers looking for innovative ways to develop the skills of their workforce. www.learndirect.co.uk

Learning and Skills Council: The Learning and Skills Council works to improve the skills of England's young people and adults. It has published a 'Single Equality Scheme' which brings together the LSC's policies on race, gender and disability. The Scheme aims at ensuring a coherent framework for promoting equality and diversity within the organisations and across the learning and skills sector. www.lsc.gov.uk

National Institute of Adult Continuing Education (NIACE): NIACE exists to encourage more and different adults to engage in learning of all kinds, they campaign for and celebrate the achievements of adult learners. It is the largest organisation working to promote the interests of learners and potential learners in England and Wales. www.niace.org.uk

Support 4 Learning: Website to signpost to relevant organisations and resources in a number of key areas. The site contains links to resources for advisors, students and everyone involved in education, training and communities. www.support4learning.org.uk/home/index.cfm

UK Skills: A not for profit organisation which champions skills and learning for work through competitions and awards. www.ukskills.org.uk/opencms/opencms/website/aboutus/index.html

UK Resource Centre for Women in Science, Engineering and Technology: A website funded by the Department for Innovation, Universities and Skills as part of their Strategy for Women in Science, Engineering and Technology. www.setwomenresource.org.uk/en/

Age

Age Concern: Provide information to guide people through their employment options including staying in their current job, changing career or considering self-employment. www.ageconcern.org.uk/AgeConcern/info_guide_11.asp

Age Positive: Promotes the benefits of employing a mixed-age workforce that includes older and younger people; they encourage employers to make decisions about recruitment, training and retention that do not discriminate against someone because of their age. www.agepositive.gov.uk/

Lifelong Learning: Information about learning in later life. www.lifelonglearning.co.uk/z-older.htm

New Deal 50 plus: Programme for people aged 50 and over who are in receipt of and have been receiving Income Support, Jobseeker's Allowance, Incapacity Benefit, Severe Disablement Allowance or Pension Credit for at least six months. www.jobcentreplus.gov.uk/JCP/Customers/outofworkhelplookingforwork/Getting_job_ready/Programmes_to_get_you_ready/New_Deal/New_Deal_50_plus/

The Age and Employment Network (TAEN): Aims to promote an effective job market which works for people in mid to later life, for employers and for the economy. www.taen.org.uk

The University of the Third Age: Universities of the Third Age aim to encourage and enable older people no longer in full-time paid employment to help each other to share their knowledge, skills, interests and experience. www.u3a.org.uk/index.php?option=com_frontpage&Itemid=1

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