

THE TRAINING OF OLDER WORKERS IN INDUSTRY

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This investigation is concerned with determining the level of training specifically designed, planned, and applied within industrial organizations for workers forty-five years of age or older. It was assumed that industrial organizations had such training. The body of the study is divided into four chapters. The first chapter contains an identification of the aspects intended in the analysis and states the hypothesis. The second is concerned with problem areas, utilization techniques, and available alternatives. In the third chapter, the research methodology and results are presented. The fourth chapter presents conclusions and recommendations.

This study analyzes several variables which affect the older worker's occupational status, including his employment and promotional opportunities and his necessary adjustment to retirement. Throughout the discussion, the material seeks to narrow the scope of the serious physiological problem of aging and to view it in terms of the influence it has on occupational developments. The older worker often encounters difficulty in securing employment in the job market. The employed older worker frequently finds that his

job frustrates his ambitions for advancement. And all older workers must eventually prepare themselves for permanent unemployment--labeled "retirement" by society. These developments in industry show the need for training to prepare older workers for economic, social, and psychological changes brought about by the worker's occupational classification and his aging.

Results were determined by questionnaire and personal interview. One hundred of the nation's largest industrial organizations selected from Fortune's list were asked to participate in the study. Nineteen percent of the firms supplied answers to the questions concerning older workers and industrial training. Another 4 percent stated that they were unable to participate, either because the data were of an extremely sensitive nature or because company decentralization made it impossible to obtain relevant answers to the questions. Eighty-nine percent of the firms did not have any training within their organizations for older workers. Nor did these firms plan any future training for this occupational age group.

The results of the study further showed that, while company-wide training did provide some assistance to employees who might become unemployed, the same training for older workers was either felt unnecessary or was offered on the basis of talent rather than age. Training was definitely a major tool used in preparing all workers for promotion and

was also shown to be of value in compensating for formal educational deficiencies. The area of aid in adjustment to retirement seemed the most likely in which to begin industrial training for older workers.

The report concludes that major changes must occur in the beliefs of industry before any significant amount of older worker training is presented. Although replies obtained in the study reveal that industrial institutions are well established in the training field, the ultimate utilization of training programs is closely linked to financial considerations. Older workers are often considered not worth the training investment, a bias which allows industry little latitude in utilizing their capabilities.

This study recommends that industrial organizations increase and stabilize their levels of training, expand its purpose to satisfy group needs, and design it to increase the worker's job satisfaction. Additional research is needed in (1) actual amounts of training, (2) types of individual training, and (3) training for specific group needs.

THE TRAINING OF OLDER WORKERS IN INDUSTRY

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CHAPTER I

INTRODUCTION AND DEVELOPMENT

OF THE PROBLEM

Introduction

In recent years a considerable amount of material has been written concerning the changing society in America. A dominant trend expressed in much of the literature is that business, in an effort to insure growth and success, is emphasizing the importance of a youthful working force.¹ Concurrent with the emphasis upon youth is the development of a larger, more competitive labor market which comprises an increasing number of older workers.

These social and economic factors which stress the importance of youth and create a more competitive labor market have led to problems and hardships for many older workers. It would seem that a key to the understanding of these problems rests in one's analysis of the relationship between the older worker and his employer. The employer is in a position to provide the older worker with the necessary aid and assistance--in the form of training, counseling, good leadership, and creation of a favorable job environment.

¹See Howard Y. Weatherbee, "The Older Employee--A Negative Manpower Resource," Personnel, XLVI (January-February, 1969), 31-36.

This study examines the older worker's position in industrial organizations. The focus of the discussion is concerned with identifying older workers' occupational problems as well as speculating on possible solutions to these problems. In addition, the material seeks to analyze some of the numerous social and economic organizational variables which interact to help determine the overall position of the older worker in our economy. Of specific concern to this study is the training of older workers--training by an industrial organization in order to (1) treat the older worker's unemployment resulting from organizational displacement, (2) facilitate his promotion in an organization, and (3) prepare him for retirement.

The body of this study is divided into four chapters. The first chapter identifies some of the aspects of the intended analysis and states the hypothesis. The second expands upon the background information relevant to problem areas, utilization techniques, and available alternatives. In the third chapter, the research methodology and the results of the study are presented. The fourth chapter offers conclusions and recommendations.

Older Workers and the Job Market

The placement of individuals forty-five years of age or older into existing job vacancies becomes increasingly more difficult as market conditions and organizational age

discrimination barriers force older workers into the long-term unemployment ranks. Numerous governmental authorities and researchers of older workers' economic problems state that the occupational demand for older workers exists only when the supply of younger applicants is almost exhausted. In a depressed job market, this demand is thus frequently non-existent. As Harold Sheppard stated,

It may be ironic, if not paradoxical, that the emergence of a society that enables increasing proportions of its members to live more than 60 years is the same society in which a smaller proportion of those living to be "old" are defined as wanted or "needed" participants in the productive population--the labor force.²

The United States has experienced considerable older worker underemployment and unemployment evolving out of the post-World War II era. These developments have placed severe financial and psychological burdens upon the older worker. Plant relocations and shutdowns, labor force shifts, and broad and rapid technological advancements have displaced unskilled and professional older workers alike.

Individuals in the forty-five-plus age group have frequently experienced placement discrimination when unemployed and possibly promotion discrimination when employed. Firms have fabricated stereotyped images of older workers. These stereotypes have all too often supplied employers with a

²Harold L. Sheppard, "Aging and Manpower Development," Aging and Society, edited by Matilda White Riley, John W. Riley, and Marilyn E. Johnson (New York, 1969), p. 163.

convenient rationale to justify their practice of not hiring older workers nor investing in programs which will upgrade these individuals already in their organizations. An attempt to recognize the causes of these problems must begin with society's realization that it has not kept abreast of scientific and technological advancements. Too frequently in this nation one finds that the so-called "benefits" of progress bring the older worker little more than an unwelcome and difficult adjustment.

Manpower Utilization

"All of us are concerned with growing old. Few experiences in our lives are of greater consequence to us. And the problems of growing older are our problems, as individuals, whether we are old or not."³ It is unfortunate that society has established, and industry has frequently put into practice, policies founded upon possible misconceptions and generalizations concerning the "average" older worker. These attitudes, as expressed in industry, have been the foundation for making decisions concerning not only the employment of older workers, but also their training,

³John Gold Henson, "Development of a Company Plan for Employing the Retired Older Worker," unpublished master's thesis, Department of Business Administration, Southern Methodist University, Dallas, Texas, 1960, p. 1.

promotion, and compensational value.⁴ Too frequently in the past, industry has accepted the stereotyped image of the older worker while failing to isolate and understand the variables which make so many older workers exceptions to the average.⁵

Successful manpower policies in industry, government, and society must originate in the recognition of differences in people, thus providing opportunities to those who are qualified while endeavoring to deal with and overcome the handicaps of those who are not qualified. Government and industry, in some cases, have adopted such an attitude and have taken steps to insure that all human resources in this country be utilized--including the older workers. In fact, the avenues of action open to industry in facilitating an adequate and proper solution to some of the older workers' problems are being externally encouraged by legislation. Specifically, governmental efforts to alleviate the problem of older worker unemployment have resulted in the passage of the 1968 Age Discrimination in Employment Act. This legislation forbids employers, unions, and employment agencies to discriminate against a person on the basis of age. This

⁴ Sumner Marcus and Jon Christoffersen, "Discrimination and the Older Worker," Business Horizons, XII (October, 1969), 83-89.

⁵ Harold L. Sheppard, "The Relevance of Age to Worker Behavior in the Labor Market," Industrial Gerontology, II (February, 1969), 11.

act is designed to be a positive step toward placing older workers in all types of existing job vacancies.

The Need for Training

Governmental legislation alone does not suffice to solve the complex problems of this nation's older workers. The industrial community must shoulder its share of the responsibility by seeing that workers forty-five years of age and over are given an opportunity to compete on an equal basis with their younger counterparts. Many of the internal steps which may be initiated by a firm to insure this development relate directly to the amount of training for these individuals; training which can be of mutual benefit to the organization and to the individual trained.

For the organization

training is clearly one of management's most effective means of assisting and stimulating the growth of an individual in an organization. Further, training can be considerably more than the sharpening of skills and broadening of horizons. Properly planned, it can serve the important function of developing the respect of and individual for the organization (because it respects him) and of providing management with skilled manpower resources.⁶

For the individual, specifically the older worker, training offers a solution to many of the dilemmas associated with long-term unemployment and "dead-end" jobs.

⁶Ralph G. Salvagno, "The Myths of Career Development," Training and Development Journal, XXIII (March, 1969), 47.

Through training, industry can economically and rationally justify the placement of older workers in jobs which offer them opportunity for advancement. Through training, a firm can prepare and equip each person with skills he may be able to use in the event that market shifts, plant relocations, or economic decline should force him to become unemployed. Thus, by following a course of organizational action which emphasizes a moral commitment to society, instead of joining the traditional bandwagon of accepting and continuing to exploit labor, the firm will help to eliminate a very real barrier blocking the full utilization of our nation's human resources.⁷

Whether one views the value of training in regard to the benefits it affords the older worker in job placement and promotion opportunities or retirement adjustment, the most evident aspect of older worker occupational problems is that a definite need exists for efficient, well-planned industrial training. The effective utilization of the country's manpower resources is not just an issue of institutional prejudice or personal unwarranted pride. Rather, as James Morris states,

. . . it is part of the very heart of economic behavior. Either we wish to maximize return from our limited resources or we do not. The

⁷See Erich Fromm, The Sane Society (New York, 1955), pp. 76-185.

former is economic and rational. The latter is uneconomic--and possibly suicidal given the present world struggle.⁸

Statement of the Problem

This research effort examines the factors associated with industrial training for the older worker. The problem is to determine the extent of industrial training programs specifically designed for workers forty-five years of age and older. Special attention is devoted to the function of training which will (1) prepare the older worker for possible unemployment by equipping him with skills needed to find a job, (2) increase his eligibility for promotion, (3) help to prepare him for retirement.

The first two areas of attention concern governmental efforts to place pressure upon industrial organizations to utilize available resources in improving the older worker's status in both the organization and the labor market. It seems that established governmental policy strongly encourages industry to treat the occupational problems evolving from age discrimination. Therefore, industry does not have complete freedom to base training for these workers on economic conditions. The last function of training emphasized in this study, i.e., retirement training for older workers, is

⁸James R. Morris, Employment Opportunities in Later Years (Burlingame, California, 1960), p. 45.

considered to be a social obligation of business and not an economic one.

In 1967 President Johnson commented on the somber economic position of the older worker:

Hundreds of thousands, not yet old, not yet voluntarily retired find themselves jobless because of arbitrary age discrimination. Despite our present low rate of unemployment, there has been a persistent average of 850,000 people 45 and over who are unemployed. Today more than three-quarters of the billion dollars in unemployment insurance is paid each year to workers who are 45 and over. They comprise 27 percent of all the unemployed, and 40 percent of the long-term unemployed.⁹

The unemployment situation of the older worker described by President Johnson in 1967 continues to exist in 1971.¹⁰

President Johnson noted one of the key difficulties associated with older workers when he pointed out the long-term period of unemployment (twenty-seven weeks or more) which many of these individuals undergo. Simpson comments and expands upon the causal factors contingent to this situation when he states,

at age 45 men begin to experience difficulty securing employment. They enter the downward slope of participation in the labor force, characterized by age barriers. Some may withdraw voluntarily, but most who leave the labor

⁹President Lyndon B. Johnson, message January 23, 1967, cited in Marcus and Christoffersen, p. 85.

¹⁰Department of Labor, Bureau of Labor Statistics reports that, as of August, 1971, a total of 21,737,000 individuals between forty-five and sixty-four years of age are employed in non-agricultural industries; as of July, 1971, an additional 981,000 are classified as unemployed.

force before age 65 undoubtedly are unable to find employment.¹¹

In the dichotomous world of the industrial organization, promotion may not be based upon performance, and job success may not relate to contribution. In many cases, a firm classifies the older worker as a "valued employee in the organization," thus indicating that his experience and expertise are key factors in the attainment of specific organizational objectives. However, consideration for promotion is usually directed toward younger, possibly better educated individuals. In other instances, when automation and organizational change force this "valued employee" out of work, little organizational effort is initiated to find the displaced worker a new job in the labor market.¹²

As noted in this section, two developments in industry create a high priority for training older workers. Such training would enable these individuals better to compete for jobs in the labor force if and when they become unemployed. The training would also increase the organizational value of each employee and prepare him for possible promotional opportunities with his own organization. A third

¹¹Ida Harper Simpson, "Factors Affecting and Substitutes for Employment Among Older Workers," Our Elderly Americans: Challenge and Response, edited by Charles G. Oaks (Spartanburg, South Carolina, 1967), p. 55.

¹²Raymond M. Hass and Edwin W. Crooks, "Rebirth of the Older Employable: A Note to Retailers," Business Topics, XIV (Autumn, 1966), 27-34.

reason for this training is the need to prepare the older worker for retirement.

There is a definite trend in industry which forces a person to retire at a time which is possibly the peak of his performance.¹³ A great number of workers are unable to make this severe adjustment--one which requires that an individual shift his performance, interest, and activity into new areas. It seems that a partial answer to this problem lies in the use of industrial training programs which would alert the prospective retiree to the imminent change in his life routine.¹⁴

Hypothesis

The hypothesis of this study is that there is a significant amount of industrial training specifically designed, planned, and applied within industrial organizations for workers forty-five years of age or older.

Limitations of the Study

Throughout this paper, each chapter presents material composed of actual organizational replies and information

¹³R. F. Sondag, "Forced Retirement in the Prime of Life Called Absurd Waste," Employment Service Review, V (July-August, 1968), 2-8.

¹⁴The Drake University Pre-Retirement Planning Center has developed an "action-oriented and experience-based learning model" which is designed to equip individuals with the attitudes necessary to attain a satisfying and rewarding retirement; see D. L. Bowman and others, How Pre-Retirement Planning Works (Des Moines, Iowa, 1970).

obtained from library research. The study examines only those training policies of the firms selected. The variations in organizational structures and the diversified functions of firms undoubtedly influence the level of training within each organization. Therefore, it is important to keep in mind that this study makes no conclusive statement concerning the level of training of older workers in the national economy, but rather its purpose is to provide a general indication of the training for older workers within those firms analyzed.

Further limitations inherent in this study must also be noted. These include the following factors: (1) No attempt is made to differentiate between the race, sex, religion, or national origin of those employees to whom training time is allocated. (2) No treatment of older workers' problems outside industry is specifically made. The sociological problems of the aging process are only briefly noted, and the influence of aging is merely discussed as it pertains to older workers' job capabilities. (3) No attempt is made to offer research or recommendations concerning the overall occupational placement of older workers. (4) No specific older worker industrial training program is adopted or advocated, and no definite expertise in the training of older workers is recognized. (5) No attempt is made to determine the cost of training in the firm, not even the cost of training older workers.

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Summary

In this chapter, it has been shown that fluctuating labor market factors, the demand for better manpower utilization, and the need to establish industrial training programs are three variable circumstances which strongly influence the occupational classification of the older worker. The older worker job market is frequently seen as a place where individuals of a certain age experience difficulty in securing employment. Manpower utilization concerns the need to develop and employ our nation's human resources to the fullest--regardless of job market age discrimination. Training may be viewed as one means through which job market and manpower utilization problems are solved.

Particular emphasis in this chapter has been upon the introduction of concepts which recognize the need to utilize organizational training to enhance older worker promotional opportunities, increase their occupational flexibility, and prepare them for retirement. These goals are the major areas of interest to this study. Consequently, additional material will be presented in the following chapters concerning these aspects of training.

The reader is likely to suggest that problems concerned with the older worker's job market are similar, if not identical to those concerned with manpower utilization in general. In the second chapter, a greater differentiation will be shown between the personal hardships, i.e., age

discrimination, capability barriers, and other impediments encountered by the older worker in the job market, as opposed to the impersonal but extremely important steps leading to a more effective utilization of all available manpower. The discussion in the second chapter also offers an analysis of certain commonly believed characteristics of older workers--seeking to view these attitudes and beliefs in an objective manner.

CHAPTER II

BACKGROUND AND SCOPE OF THE PROBLEM

Introduction

Sociology researchers have developed a concept which prescribes a "sociology of life course." Advocates of this concept "suggest that every person, if he survives, moves through various stages of development--infancy, childhood, young adulthood, maturity, and older age."¹ This universal phenomenon stipulates that, at various stages in the development process, each person in a society must be provided for by that society. This includes the crucial period which begins when a worker finds himself on the downhill path of occupational opportunity.

In the United States massive resources are directed to preparing young persons for adult roles, but relatively little attention has been given to preparing middle-aged persons for older roles. The transition from middle to older age is usually unplanned and studies suggest that in many cases old-age roles are tragic and wasteful.²

Most young adults realize that the skills and education provided by society are structured in a manner which allows

¹E. Grant Youmans, "Some Views on Human Aging," Foundations of Practical Gerontology, edited by Raymond R. Boyd and Charles G. Oakes (Columbia, South Carolina, 1969), p. 19.

²Ibid.

for participation in the labor force. Progressing from youth to older age, the worker becomes increasingly more aware of the importance of the work environment to him and to his family. In most circumstances, the additional responsibilities which accompany the aging process force this awareness. The older worker's occupational maturation at least has taught him, as Ogden Nash wryly points out, that even ". . . if you don't want to work you have to work to earn enough money so that you won't have to work."³ Wight Bakke continues to expand upon this economic exigency when he states, "Whatever the degree of frustration or satisfaction of major human desires through the experience of work, necessity does not permit a choice between work and idleness."⁴ Therefore, the person forty-five years of age or over--not yet retired--is in a position where he must either work or be primarily supported by the limited economic assistance of society. This economic assistance, however, is frequently offered in a begrudging manner and often accepted in an attitude of shame and humiliation.

The dichotomy which exists between one's need to work and his ability to find work is, of course, not unique to older people. However, some of the causes stimulating this

³Ogden Nash, "More About People," Montage: Investigations in Language, edited by William Sparke and Clark McKowen (Toronto, 1970), p. 168.

⁴E. Wight Bakke, The Unemployed Worker (Cambridge, 1969), p. 104.

conflict are germane only to the older individuals in this nation. These causes and other factors associated with the economic and social problems of the older worker are discussed in this chapter.

This chapter includes an examination of some of the older worker's hardships evolving out of his position in the labor force. The discussion focuses upon age discrimination, the older worker's job environment, his job capabilities, the steps which may be taken to facilitate the utilization of these capabilities, and retirement policies. While a need for training is implied in much of the material, the accompanying problems associated with the implementation of such training are also reviewed. The overriding theme of the chapter stresses the need for action.

The Employment of Older Workers

In the fictional development of many aspects of individual behavior, Alexander Solzhenitsyn presents a literary work frequently focused upon individuals who reluctantly face the realities of growing old.⁵ These individuals recognize that change in their lives is often impossible. Men become tied to a life course and are often frozen in an occupation. Although Solzhenitsyn's characters are fictitious, the barriers blocking vocational change for many

⁵See Alexander Solzhenitsyn, Cancer Ward (New York, 1969).

older employees are real. Numerous older workers realize that a vocational choice exercised some twenty or thirty years in the past becomes a binding occupational commitment in the present and future. A paradox exists in society between the commitment of the past and the economic and organizational conditions of the present which may force an alteration of this commitment and place pressure upon individuals to change jobs.

When discussing this problem, it is important to remember that the skills and education (both possibly limited) of older individuals were usually acquired early in their lives. These skills have resulted in a certain well-established occupational classification. By juxtaposing this occupational classification with the changing occupational structure, one may realize the cause for a portion of unemployment among older workers.⁶ Many individuals are forced to enter a job market with skills which have been developed and applied in declining industries. These skills, often classified as obsolete by many employers,⁷ are of marginal value in a job market with openings in new and

⁶Ida Harper Simpson, "Problems of the Aged in Work and Retirement," Foundations of Practical Gerontology, edited by Raymond R. Boyd and Charles G. Oakes (Columbia, South Carolina, 1969), p. 156.

⁷"The Older American Worker," Age Discrimination in Employment, Report of the Secretary of Labor to the Congress under Section 715 of the Civil Rights Act of 1964 (Washington, 1965), Chapter I.

developing industries. Industry's rising demand for education, contrasted with the insufficient education of many older workers, further compounds the severity of the industrial shift, limiting the placement of these individuals.

The dilemma of outmoded education and skills is more than a problem of proper manpower matching. The resulting unemployment problem, in part, hinges upon the negligence of both the individual and his organization to exercise the necessary amount of responsibility. It is the responsibility of each individual to see that his skills do not become obsolete. And probably even more crucial, it is the responsibility of the nation's institutions to see that work is provided for the person over forty-five years of age. Thus it is likely that a mutual lack of initiative frequently makes the worker and the institution mutually to blame for the policies which block the employment of older individuals.

Age Discrimination--Myth or Fact

A large number of researchers, governmental authorities, and probably many older workers believe that institutional barriers have been erected to insure that a person whose age is at or above a certain limit (usually about forty-five) will encounter job discrimination. In the following pages, expert opinions and the findings of several research studies are presented in an effort to provide supporting documents for these beliefs.

In employment, firms discriminate in favor of the younger worker, who either has new and up-to-date vocational skills or who assumedly can be taught these skills more readily than can the older worker.⁸ In fact, many employers consider older workers to be a segment of the labor force which should be neither trained, hired, nor promoted.⁹

In a Monthly Labor Review study performed over fifteen years ago, researchers presented data which suggested that an employer, in considering an applicant for employment, should evaluate the potentialities of the individual rather than attempting to draw conclusions from his chronological age.¹⁰ In the years following this study, many firms ignored this advice and continued to discriminate against the older worker. A 1960 study, performed to determine older worker industrial hiring practices among 300 of the nation's largest industrial firms, concluded that age barriers do exist. These employment barriers exist on a broad scale and apply to workers in all occupational areas. The findings provided statistics which revealed that a firm

⁸G. Marback, Job Redesign for Older Workers (Paris, 1968), p. 22.

⁹Weatherbee, "The Older Employee--A Negative Manpower Resource," p. 31.

¹⁰Jerome A. Mark, "Measurements of Job Performance and Age," Monthly Labor Review, LXXXIX (December, 1956), 1410-1414.

usually refuses to hire 30 percent of those applicants over forty-five years of age and 75 percent over sixty.¹¹ In 1963, the Department of Labor conducted a survey in eight large cities and found that over half of the orders filled at the public employment office specified an upper age limitation. Most frequently, these age limitations began at forty-five years of age.¹² Two years later, a report prepared by the Department of Labor supported past findings and showed that the job opportunities decrease as the age of the individual increases, until, as he reaches the sixty-year age limit, the opportunities nearly vanish.¹³ In this report, statistics were cited to show that, out of the 500-plus manufacturing companies surveyed, only 8.6 percent of the new employees were older workers. The study found that employer attitudes concerning hiring behavior can range through three categories: (1) age limitations being formally incorporated into hiring policies, (2) no age limitations stated, or (3) no policy toward age whatsoever. Of those firms which did have an age limitation incorporated in the hiring policy, the majority imposed employment barriers on all jobs in the firm. This policy was normally set by the

¹¹Morris, Employment Opportunities in Later Years, pp. 29-45.

¹²Vernon Sheblack, "The Older Worker: Employment and Training," Training and Development Journal, XXIII (March, 1969), p. 5.

¹³"The Older American Worker," Chapter I.

front office.¹⁴ In a more recent study, by Marcus, Sumner, and Christofferson, the researchers found that only one out of six firms had no age-limit policy, while one out of four imposed age limits for certain occupations (695 businesses forwarded replies in this survey). Only 8 percent of all those hired by the organizations were from the forty-five to sixty-four age bracket.¹⁵ The majority (67 percent) of the businesses removing age limitations were state and federal governmental units.

These studies most definitely support the commonly held belief that age discrimination does exist in this nation. However, in both governmental and private studies, the findings reveal an interesting paradox--one which involves the principle of economic supply-and-demand. Employers who set age limitations pragmatically remove them when the labor market is tight. They are usually eager to place older workers in the hard-to-fill jobs. Thus, convincing evidence is offered by these studies to substantiate the fact that the labor demand-supply conditions in the economy outweigh any consideration which may motivate the stipulation of an upper age limitation.

All factors considered, the older worker's bargaining position is usually restricted by his age. This is

¹⁴Ibid.

¹⁵Marcus and Christoffersen, "Discrimination and the Older Worker," p. 86.

especially true when one considers the difficulty of finding employment after being released from one's present job. Age discrimination does not mean that older workers do not have jobs, nor that they will not find employment if unemployed. Rather it does mean that older people often must undergo additional occupational hardships, possibly in the form of longer working hours, reduced wages, or other personal sacrifices, in order to provide for themselves and their families. Robert D. Moran, Federal Wage and Hour Administrator, considers age discrimination in employment as damaging and perverse to the economy as is discrimination based on race, sex, or any other arbitrary criterion.¹⁶

Thus the fact that age discrimination exists means that both the individual discriminated against and the overall economy must pay a price. This price is manifested in the monetary and psychological pressures upon the individual and the moral, economic, and social pressures upon the society. Later in this chapter, the material will focus upon what has been and can be done to eliminate age discrimination and also some alternatives available which may be applied to insure that this nation may better utilize its older manpower.

¹⁶Robert D. Moran, cited in Theodore Schuchat, "Progress Report on the Age Discrimination in Employment Act," Industrial Gerontology, VI (Summer, 1970), 22.

Reasons for Age Discrimination

After a discussion of any form of discrimination, a person normally asks, "Why?" In this case, the reasons for age discrimination are almost as numerous as the variety of companies who discriminate. The following reasons were drawn from a review of related literature: the older worker cannot accept change; the employment costs are too high in the form of production losses and fringe benefits; the older unemployed workers are misfits; they are hard to supervise and train; they block promotion of present employees; and they are a poor health risk. Actually, the list could go on and on, for each organization that discriminates undoubtedly has its own reasons for doing so.

Employers have considered the feasibility of hiring workers primarily from the economic probability that a younger worker will generally be with the firm for a longer period of time. Many employers also believe that older individuals have a difficult time adjusting to or accepting changes. Their inability to change their attitudes and behavior sows the seeds of discontentment which result in supervisory and personnel problems throughout the facility. These negative beliefs concerning the employment of older workers, coupled with considerably more positive beliefs concerning younger workers, combine into a formidable employment barrier for many older individuals.

It seems natural for a firm to view the favorability of hiring workers from the standpoint of what "extra" employment costs will be incurred if a person of increased age is hired. Profit is and should be a major concern to all industrial organizations. Therefore, an understanding of the causes for age discrimination, as far as most firms are concerned, must be viewed in terms of this cost. The anticipation of higher employment costs, whether supported by actual practice or not, are frequently a firm's rationale for advocating age discrimination. Age discrimination is accepted in the hope of reducing employment and overall operational expenditures.

The validity of this practice is questionable. Morris reported in 1960 that few institutions have initiated studies to determine whether age discrimination is beneficial to the organization.¹⁷ It is likely that some alteration in age discrimination policies has been made in the eleven-year interim between this finding and present employment practices. Regardless of the reasons offered to support age discrimination, national legislation was passed in 1968 to eliminate this practice. In most circumstances, the law requires that an employer test an older worker to see if he can perform the job functions.¹⁸ A more extensive

¹⁷Morris, Employment Opportunities in Later Years.

¹⁸Marcus and Christoffersen, "Discrimination and the Older Worker."

analysis of the purpose of this act and the anticipated results is presented in the next section.

Age Discrimination in Employment Act

One June 12, 1968, the Age Discrimination in Employment Act of 1967 became effective. The twofold purpose of the act was to (1) prevent age discrimination by employers, labor unions, and employment agencies and (2) promote the hiring of older workers based upon their ability.¹⁹ The coverage of the act includes those employers who have fifty or more employees and who are engaged in interstate commerce. This coverage also includes those unions with twenty-five or more members. The act stipulates that the Department of Labor should initiate research designed to provide managers and union leaders with information concerning the needs and abilities of older workers.

Once the act's objectives are stated, then it becomes necessary to evaluate the legal steps used to achieve these objectives. The act makes it unlawful for an employer to (1) discriminate or segregate in wages, hours, or other conditions of employment because of age, (2) discriminate in hiring because of age, (3) reduce wages to comply with the act. It is unlawful for employment agencies to (1) refuse to provide service to an older person, (2) refuse to refer

¹⁹Address by Clarence T. Lundquist, "The Age Discrimination in Employment Act," Monthly Labor Review, XCI (May, 1968), 48-51.

an individual to an employer because of age. It is unlawful for a union to (1) exclude or expel any individual because of age, (2) limit or segregate membership or refuse to refer for future employment because of age, (3) cause or attempt to cause an employer to discriminate because of age. The employment considerations stated in the act allow businesses enough flexibility to place younger employees in jobs which have a bona fide age limitation and/or are limited because of public interest or safety reasons.

It seems safe to say that the government's primary concern is placing older workers in jobs; the prosecution of employers, unions, or employment agencies for not complying with the law is a step reluctantly initiated by either a state or the federal government.²⁰ Government naturally desires compliance with the law; however, an unaggressive policy which fosters the ultimate acceptance of the law rather than a forced adherence to it seems to be the course of action usually taken. As one author reports, in those states where age discrimination is illegal, the obvious forms of age discrimination have decreased, and job opportunities for older workers have increased.²¹ The Department

²⁰The Department of Labor, Wage and Hour Division, was unable to provide the total number of age discrimination cases initiated by the federal government. They did indicate that the number was considerably fewer than those cases of discrimination relating to sex, race and/or religion.

²¹Sheblak, "The Older Worker: Employment and Training," p. 4.

of Labor, in its Labor Law Series, supports this author's beliefs by the presentation of findings (1967 data) which show that, although the approximately twenty-five state laws which bar age discrimination have not given rise to many cases of actual prosecution of employers accused of violating the acts, the laws have had a "moral effect" which has resulted in the alteration of age discrimination policies.²²

Capabilities of Older Workers

The "moral effect" of a law is frequently put to a pragmatic test by institutions who alter policies to accept those who were previously unacceptable. This test for an older worker raises the question of the level of his capabilities. Thus, to help balance the occupational value of the older worker and the practice of age discrimination, one must analyze the capabilities of those individuals forty-five years of age and over.

Does age physically and/or mentally limit a person on his job? What is the ability of the older worker concerning his present or a future job? Does he still possess the capacity for learning new skills, and is he or can he be motivated to learn these skills? All these questions relate directly to the problem of age discrimination.

²²"Age Discrimination Prohibited in Private Employment-Major Provisions in State Laws," Labor Law Series, 6C, Washington, U.S. Department of Labor, Wage and Labor Standard Administration, Bureau of Labor Standards, October, 1967, pp. 1-21.

As indicated in previous pages, the most common cause for age discrimination cited in institutions arises from the belief that an older worker is not as productive as his younger counterpart. As Crook and Heinsteins state,

The assumption that worker performance declines with age is probably one of the most significant deterrents to the hiring of older workers. Actually there is little objective evidence on the relation between age and productive efficiency.²³

The research on these beliefs simply provides varying and inconclusive results. The utilization of various methodologies to study the aging process, the variables present in differing occupations, and the definition and measurement of productivity have caused confusing and conflicting research on decreases in productivity due to increases in age.

A starting point in the presentation of findings in this area should be to recognize the differences in people. It is misleading and erroneous to view individuals over forty-five years of age as a stereotyped group in which all the members have the same abilities, needs, and goals. In a study undertaken by Monge,²⁴ he found that ability to learn new concepts and skills is not influenced by a person's age per se, but rather by one's use of the knowledge of how to learn on a continuing basis. An older worker may be

²³Hamilton G. Crook and Martin Heinsteins, The Older Worker in Industry (Berkeley, California, 1958), p. 57.

²⁴See H. Rolf Monge, "Learning in the Adult Years: Set or Rigidity," Human Development, XII (1969), 131-140.

incapable of learning simply because of the inadequacies of his learning set, i.e., the tools and techniques of learning. Gellerman continues along this approach by pointing out that older workers often do not have the basic skills required to learn the duties needed to adjust to changing jobs. These workers, in many cases, are forced to draw upon inadequate and weak educational backgrounds and are thus unable to understand the mechanics of learning.²⁵ Similar findings of the United States Bureau of Employment concerning the hiring of older workers suggest that age limitations are partially a reflection of the lower probability of older workers possessing the skills and education for training needed for jobs in occupations which require contemporary technological and scientific skills.²⁶ All these findings support the belief that limited education and training handicap the older worker's ability to learn new skills.

In addition to the problems created by limited education and training, anxiety and a lack of confidence may develop in a learning situation. The behavior which follows the creation of these attitudes often blocks the establishment of a favorable learning environment. Learning is reduced because a lack of interest exists. It is further

²⁵ See Saul W. Gellerman, Management by Motivation (New York, 1968), pp. 145-158.

²⁶ Simpson, "Problems of the Aged in Work and Retirement," p. 159.

hindered by the material the institution assigns a person to learn and by the absence of motivation to learn.²⁷

The individuals' own perceptions of their capabilities, which have to a great degree been formulated through an awareness and acceptance of certain institutional and social assumptions, frequently hinder the learning ability of older workers. It seems important to recognize that an older worker may well rationalize his employment-learning position because of his own personal assumptions about contemporary older workers. Blind acceptance of a stereotype by individuals within the stereotyped group tends to provide support for the continuation of this stereotype. Consequently, "there is a growing awareness that an employee's work performance may be dependent not only on his actual capacities but also upon attitudes which he feels relate to what he can and cannot do."²⁸

These past comments treat some of the limiting factors which restrict the older workers' capabilities. This discussion alone, however, presents an incomplete picture of the occupational value of many older workers. One author places all individuals forty-five years of age or over in a third stage of life called "the period of individual

²⁷Frances M. Carp, "The Psychology of Aging," Foundations of Practical Gerontology, edited by Raymond R. Boyd and Charles G. Oakes (Columbia, South Carolina, 1969), p. 111.

²⁸Crook and Heinstein, The Older Worker in Industry, pp. 23-25.

strategies."²⁹ At this point, a person's capabilities begin a downward trend. However, the satisfaction and fulfillment of higher needs normally associated with accomplishment and personal achievement continue to exist. The remaining ambition in many older workers is like the desire of a mountain climber who strives for a summit but who, for reasons of fatigue and declining ability caused by the long ascent to his present location, is compelled to alter his course and head back down the slope. His desire to reach the top, however, has not been satisfied. And in most cases, the climber does not want to be arbitrarily removed from what he considers to be his mountain.

A worker may consider his job to be his personal mountain. He devotes his energies and talents to specific tasks in an effort to gain the intrinsic and extrinsic rewards associated with the accomplishment of these tasks. Many older workers, motivated in part by a belief in a protestant work ethic, are able to secure large benefits from a meaningful job. When personal attitudes are considered in this particular labor force group, i.e., skilled and professional older workers, one finds that work is of a high value as compared to hobbies, recreation, or other pursuits.³⁰

²⁹Youmans, "Some Views on Human Aging," p. 22.

³⁰Edward Saveth, Utilization of Older Scientific and Professional Personnel (New York, 1961).

On the other hand, these workers have much to offer an employer. In a study performed by the United States Committee on Aging the results indicated that (1) the older worker's attendance is better than that of the youthful employee, (2) the aging process is not incapacitating, (3) older workers are less prone to change jobs, (4) they are highly motivated, and (5) learning ability is the same at sixty as it is at sixteen.³¹ In a study on aging and human skill, A. T. Wedford found that, as one's age increases, changes occur in the nervous system: specifically, a slowing of performance. That is, perception is slowed, control of muscles is more cautious and careful, and the short-term retention of facts is reduced. The first change does not affect productivity, and the second only occurs in peak work periods and may be overcome by the experience of age.³² From these findings and others which stress (1) the ability of many older workers to exercise mature judgment on a job, (2) a high likelihood of a strong loyalty to an employer, and (3) the cumulation of past experience which facilitates the development of an expertise in a job, one

³¹Marcus and Christoffersen, "Discrimination and the Older Worker," p. 86.

³²"The Older American Worker."

is able to discern some of the favorable elements of an older worker's occupational value.³³

It seems that the capabilities of older workers cannot be put into absolute terms. While age does cause certain physiological changes for most individuals, these changes should not prohibit the use of these workers in the majority of occupations.³⁴ One must remember that any institution or individual is subject to making an invalid judgment by placing all older workers in a negatively stereotyped occupational group. Many workers forty-five years of age and older possess the capabilities to perform satisfactorily on a job. They retain the motivation needed to achieve outstanding performance, and they are able to offer experienced guidance to the younger employees. The recognition of the capabilities, motivation, and experience of these workers may lead to the transition from regarding them as a burden shouldered by society to considering them an asset provided to a firm.

The Older Worker and His Job Environment

If the workers forty-five years of age or over do find employment and the majority of these individuals are employed,

³³See Weatherbee, "The Older Employee--A Negative Manpower Resource," pp. 31-36 and Crawford Williams, "What About Older Workers?" Supervisory Management, XII (September, 1967), 20-22.

³⁴"The Older American Worker."

then what type of job environment can they expect? It is hard to generalize about all occupational categories of older workers. Age, however, places the workers in an economic and/or social bracket which frequently forces them to accept a situation they do not desire. In the past pages, some elements of the background information have focused upon the need for both the older individual and his organization to realize that an occupational shift forces workers of all ages out of a job. The older worker is at a particular disadvantage, because, once his skills become obsolete, he not only finds himself in the same position as the unskilled worker, but his age acts as an additional handicap. His past job and job environment become the cause for his insecurity. He becomes a person with limited employment flexibility, and time is against him and in favor of youth.

The frequently pessimistic occupational picture of the older worker is not complete by just expanding upon one aspect of a job environment problem which seems to have many more dimensions. Most older workers have a considerable investment in their jobs.

The bulk of older workers in all occupational groups, with the probable exception of service work, are likely to have held their jobs for long periods of time. They tend not to leave a job voluntarily, because of the fringe and

pension benefits which they have invested in their jobs.³⁵

Many older workers have felt secure in their jobs because of the seniority system. It has been a sound foundation upon which they could depend. Even in circumstances where seniority was not present, the employer hesitated to lay off the older workers. This seniority foundation, however, has not been immune to the erosion in the demand for certain jobs. A seniority system is not adequate protection for employees who find their department discontinued or their facility closed. Under these conditions, many individuals have little choice but to enter the unemployment ranks. They must search for a new and possibly alien job environment.

A final comment concerning the older worker's job environment relates to a portion of the avant-garde literature dealing with the intrinsic rewards one obtains from one's job.³⁶ For a great number of people, a job constitutes more than the satisfaction of fundamental needs or economic security. Rather, it is a means of attaining satisfaction through accomplishing meaningful tasks: a working environment which enables one to identify with a

³⁵ Simpson, "Problems of the Aged in Work and Retirement," p. 155.

³⁶ J. D. Dunn and F. M. Rachel, Wage and Salary Administration: Total Compensation Systems (New York, 1971), pp. 117-133.

group while also achieving self-fulfillment. In contrast, unemployment frequently creates attitudes of disillusionment and isolation. Being unemployed often causes the individual to construct psychological barriers which lead to the development of apathy and a feeling of uselessness. In the following section, the discussion shifts to an analysis of the procedures which will better utilize older workers. The material relates to the steps society may take to increase older workers' intrinsic and extrinsic job satisfaction.

The Utilization of Older Workers

A means to a better utilization of manpower is one which advocates the placement of individuals in a job environment which maximizes the concept of meaningful work and minimizes the unemployment alternative. Training is one way the individual and his organization can share in the mutual responsibility of improving the economic and social welfare of the person forty-five years of age and over. Why is training so important? In the introductory chapter, the material briefly focused upon the importance of training. To supplement those comments, one is able to draw from a variety of sources. The 1969 Manpower Report to the President states,

The manpower future is promising for those who have or will achieve the education and training essential for professional and technical jobs. It is promising also for those who achieve the skills necessary for work in nursing. In blue-collar jobs, only those who are able to develop

the required skills will find good job opportunities. In the semi-skilled trades, which have in the past provided great numbers of jobs for people with limited education, a high school education or prior training (or both) is likely to be increasingly necessary as the supply of persons with such preparation becomes larger. And all workers, regardless of their level of education are likely to need continuing education to prepare for the constant changes in jobs that are characteristic of our society.³⁷

Throughout this passage the words "development," "training," and "preparation" emphasize the importance of creating, within each organization, activities and programs which utilize these concepts to equip older workers with the skills they need.

In 1963, Wolfbein anticipated the comments of the Department of Labor when he advocated the belief that (1) everyone can be trained, (2) everyone needs to be trained, (3) every organization needs training, (4) training for the "older worker" must be responsive to the real world, and (5) emphasis should be placed upon developing qualified trainers.³⁸ The research in this study pays particular attention to Wolfbein's fourth point. It would seem that training becomes relevant when it equips an individual for the present and prepares him for the future. In this regard, training may be designed to equip workers with

³⁷ Manpower Report to the President (Washington, 1969), p. 43.

³⁸ Seymore L. Wolfbein, "Measures to Improve Employability and Increase Work Opportunities," Aging and the Economy, edited by Harold L. Orbach and Clark Tibbits (Ann Arbor, 1963), pp. 64-66.

skills which enhance their promotional opportunities and/or provide them with transitional skills needed to secure a job when unemployed. Many older workers need this type of training. In addition, probably an even greater majority of these older individuals require some form of training or counseling to help prepare them for retirement.³⁹ (This utilization alternative will be discussed in greater detail later in this chapter).

In our society, almost everyone pays a price for not utilizing training. As indicated previously, unemployment may be the price for many individuals. And it seems that one implication concerning unemployment is clear--government and industry alike are aware of the substantial difference between an employed person contributing to society and an unemployed one being supported by that society. The burden of support normally falls upon the taxpayer, while the personal hardships and anxiety usually fall upon the individual supported.

Many employers have within the realm of their operating procedures the means and methods to provide solutions to a variety of serious and controversial problems facing the older worker. The ability of each employer to implement training programs in which the older employee may participate

³⁹See "Runaway Problem of Retirement: More and More Old People," U.S. News and World Report (August 5, 1968), pp. 76-78.

is affected by several occupational and economical variables.

However,

quite fundamental among the causes of the non-employment of older workers may be the inertia of corporate and trade-union bureaucracies, each of which may find it easier to acquiesce in the premature retirement or non-employment of older workers, than to devise flexible arrangements permitting their employment.⁴⁰

A lack of flexibility on the part of an employer may not always originate from formal company policy. As implied earlier in the discussion, an employer's ignorance of the capabilities of older workers and his ignorance of the types of training programs which will facilitate an increase in the utilization of this manpower segment have often resulted in unemployment among individuals forty-five and over. It is simply a case where "limited knowledge by some managements of the special techniques of job redesign and training method for older workers tends to reinforce the resistance to their employment."⁴¹

The training of older workers is limited by more than an employer's ignorance of adequate training techniques. Even established training programs often fail to meet the needs of the older employee. From an industrial, pragmatic point of view, it is not feasible to expect an employer to

⁴⁰Ida Harper Simpson and John C. McKinney, editors, Social Aspects of Aging (Durham, North Carolina, 1966), pp. 20-21.

⁴¹OECD Social Affairs Division, Promoting the Placement of Older Workers (Paris, 1967), p. 8.

train older workers for jobs in different occupations, thus equipping them with a skill that could be used in a growing employment sector, e.g., services. Normally, industry desires to implement programs which pay the greatest dividends. One would hope, however, that in most instances training in industry should provide an older employee with skills that are general rather than specific and therefore of value in other occupations.

A more efficient utilization of older workers is in part hampered by the attitudes these individuals hold toward training. Many of these workers do not feel that opportunity is contingent upon one's level of training. This group cannot grasp the need for or value of training. Thus, they see no point in participating in governmental or industrial programs. Frequently they feel that they lack the education required to participate in a training program. Past experiences with education strongly influence and motivate their behavior. For many, "negative" or "non-rewarding" experiences acquired in elementary education are associated with the training process. These workers have complexes concerning their ability to perform in training, fearing that younger workers may "show them up." Consequently, they may have little confidence in their ability to learn and feel that they are protected from the threat of technological

displacement by their seniority.⁴² It is a case in which many of the older workers in the firm look toward retirement and see no need in training for another occupation or advancing their skills in a certain trade.⁴³ Employees who express these attitudes are not likely to enhance the establishment of an older-worker-oriented training program. Furthermore, a union will probably not pressure an employer on this issue when the members express such "negative" attitudes toward training.

From all indications, the value an individual places upon training seems to be highly personal. Some people who need training know they need it, and some who need it do not think they need it. In most circumstances, the decision to participate in a training program should be made by the individual. On the other hand, a seemingly free choice concerning the decision to establish or participate in training does not release the employer or the individual from their responsibilities to a nation in which unemployment costs continue to rise. The employer is not isolated from economic decline; likewise the employee is not immune from unemployment. An individual's perception as to the value of training undoubtedly changes when he looks around and sees himself

⁴²Ned A. Rosen, Lawrence K. Williams, and F. F. Foltman, "Motivational Constraints in an Industrial Retraining Program," Personnel Psychology, XVIII (Spring, 1965), pp. 65-79.

⁴³Sheblak, "The Older Worker: Employment and Training," p. 7.

in a line waiting to file for unemployment benefits. The value of "relevant" training then becomes increasingly more poignant to the individual, his employer, and his nation.

One final barrier to a better utilization of older workers should be discussed--the techniques and methods which may be used to train these individuals. An article by Gordon Lippitt outlines the basic concepts of adult learning.⁴⁴ Adults enter learning experiences with images of self-directed, dependent learners. Adults also enter a learning situation with more experience and with a greater intention of applying what is learned to everyday situations. The implications of these findings for developing a methodology of training thus establish a design which stresses active adult participation in learning, utilizing cumulative experiences of adults to produce the greatest learning potential and focusing more upon "real-life" problems than upon organizational situations.⁴⁵

Training for older workers should be a more active than passive process. Studies have revealed that older workers perform at their best in training programs which stress individual initiative and are planned so that a trainee can

⁴⁴Gordon L. Lippitt, "Conditions for Adult Learning," Training and Development Journal, XXIII (June, 1969), 2.

⁴⁵Ibid.

proceed at his own pace.⁴⁶ Under certain conditions, a mixture of both old and young individuals in a training program is desirable. The competition between the age groups is beneficial to all involved. In most situations, a training program for older individuals should emphasize the use of participation, controlled experiences and problem-solving tasks. These activities allow the person to utilize his talents to learn skills at his own pace while at the same time developing his ability to retain and apply these skills in an occupation.

In this section, the discussion has revolved around the factors which either block or enhance an effective utilization of older workers. There are numerous other problems which hamper the training of older workers and thus limit their utilization. They include inadequate planning and counseling, poor trainee and trainer selection, poor evaluative techniques, and failure of an employer to consider the trainee's desires. These and other factors compose formidable training barriers; however, the importance of training as a tool in facilitating a better utilization of this nation's human resources should not be overburdened by an awareness of problems. Training directors and corporate officers must recognize that some mistakes are going to be made in

⁴⁶Arnold Van Fossen, "Life Starts Again at 40," Training in Business and Industry, VII (February, 1970), 36-40.

training employees. Hardships will be encountered--financial or otherwise. If management is willing to absorb some of the implementation costs of starting older workers' training programs, then the ultimate result may accord the actual dividend it so frequently desires. A better utilization of this nation's resources is beneficial to each person in this country, not just to a stockholder.

Retirement Policies

A considerable amount of material in this chapter has focused upon the occupational problems and characteristics of older workers. Emphasis has been upon the utilization of this manpower group. Frequently an alternative to employing these workers is expressed in industry by the establishment of retirement policies. Clearly these policies mean different things to different people, for "various studies have suggested that the pattern of retirement is strongly influenced by the person's occupation."⁴⁷ These patterns vary depending upon the desires of the organization and the worker. However, in most cases, "a man is never as aware of his work and its meaning to him as at that time when he anticipates retirement."⁴⁸

⁴⁷ Ethel Shanas and others, Old People in Three Industrial Societies (New York, 1968), p. 288.

⁴⁸ Ibid., p. 320.

Although many older workers may look forward to retirement, it seems that, for those who do not, the alternatives are extremely limited. Retirement for many individuals means a loss of a substantial amount of wages. For others, retirement is far more serious, in that it "is only an intensification of a life-long problem."⁴⁹ All individuals face the handicaps which come from growing old. Few individuals are given an opportunity to overcome certain occupational handicaps in a new job once they have retired. The majority of older workers who do manage to stay in the labor force after age sixty-five (normally the age considered for compulsory retirement) "do so by being able to control their own destinies through self-employment or by having their desires for work taken into account by their employers."⁵⁰

Compulsory retirement at sixty-five years of age is not the main issue to be considered when discussing older workers in the forty-five to sixty-four manpower group. Within this group, it seems that the decision to retire should be contingent upon a realistic evaluation of a person's job performance in relation to the needs of the organization and society. The consequences of retirement at sixty-five are in most cases not as serious to the utilization of older

⁴⁹ John C. McKinney and Frank T. deVyver, Aging and Social Policy (New York, 1966), p. 9.

⁵⁰ Simpson, "Problems of the Aged in Work and Retirement," p. 154.

workers as those policies which force workers fifty and fifty-five years of age to retire. These policies often do not take into account their economic and social results upon the individual and society. Likewise, an organization may not realize its loss until it becomes too late. Consequently, the arbitrary early retirement decision made by the employer, or a hasty, unplanned retirement decision made by the individual often becomes costly to all involved. As Juanita Kreps states,

Retirement policies designed to reduce labor-force size seem defeatist and unimaginative in comparison with policies aimed at increasing the rate of economic growth and hence providing jobs.⁵¹

Furthermore,

if individual difference in physiological and psychological aging are related to productivity or workers, then compulsory retirement policies may lead to a very considerable loss of productive potential in our economy, unduly deprive a large number of people of adequate income, and unnecessarily increase that portion of the population that is dependent upon the remainder.⁵²

It must be remembered that retirement from work is more than a matter of economics, even though economics may be a primary cause for a number of the older workers' personal problems. Retirement, however, is also a social process.

⁵¹Juanita M. Kreps, "Employment Policy and Income Maintenance for the Aged," Aging and Social Policy, edited by John C. McKinney and Frank T. deVyver (New York, 1966), p. 139.

⁵²Crook and Heinstein, The Older Worker in Industry, p. 4.

Work has been the central life task of many individuals who have come to find a means of self-actualization in their jobs. These workers value their job relationships. Fellow workers become on- and off-the-job friends. Recognizing the considerable "investment" each person has in his job makes it easy to see that, for many individuals, the approach to retirement is considered to be a threat to one's future.. This threat is countered by repression, rationalization, procrastination, and unrealistic attitudes toward plans which may prepare one for the future.

Whether retirement creates a positive or a negative impression in the mind of the prospective retiree, the trend toward early retirement is growing. Each person may possibly have to cope with the problem of retirement at an earlier age. Likewise, he may reap the retirement benefits at an earlier age. In a study undertaken by the University of Oregon, researchers found that greater emphasis is being placed upon early retirement by both the employee and the employer.⁵³ Findings reported in this study support the position that training or counseling is needed to facilitate a meaningful and healthy retirement adjustment. It is important that each organization prepare individuals for what is becoming the accepted phase of the older person's life--leisure.

⁵³Early Retirement: A Survey of Company Policies and Retirees' Experiences (Eugene, Oregon, 1969).

If an organization seeks to exercise the retirement alternative as opposed to utilizing older workers, then it seems feasible to assume that the same organization has a responsibility to see that the worker is prepared for this alternative. In certain situations, an organization may discard an older employee as one would discard an orange peel. The fruitful years are past--the future only brings increasing employee costs. The initiation of retirement policies which recognize that "man is not a piece of fruit"⁵⁴ helps to insure that these individuals receive the required guidance. Thus, training for retirement is not only realistic, but in most cases essential to the welfare of the retiree.

Summary

In this chapter, the material has sought to narrow the scope of the serious physiological problem of aging and to discuss it in terms of its influence on an individual's occupational position. The evolution of this physiological process expands into an array of problems in other areas--ultimately affecting the economic, psychological, and moral positions of both the employee and employer. The remaining partner in this tripartite relationship--society--either suffers or benefits from the actions of the other two.

⁵⁴Arthur Miller, Death of a Salesman (New York, 1949), p. 82.

Many of the dependent, independent, and intervening variables which relate to effective older worker utilization have been reviewed in this chapter. In an effort to clarify some of the aspects of age discrimination, this chapter has first offered considerable support for the belief that age discrimination is a widespread phenomenon. Second, it has identified a portion of the rationale causing age discrimination, and third, it has reviewed and explained governmental attempts to treat this form of employment discrimination. Seeking to offer an objective analysis, some of the positive and negative characteristics of older workers have also been presented. An overall indication evolving out of this discussion seems to prescribe an employer's course of action which seeks to evaluate people on an individual rather than a group basis.

Considerable emphasis in this chapter has been upon the need for each individual to recognize that aging and accompanying occupational problems of the older person create a demand for training. It is likely that each occupational alternative selected by the employee or required by the employer necessitates some amount of preparation. This includes preparation for the three alternatives frequently mentioned in this study--promotion, new employment, and retirement.

In the third chapter, the methodology and the results of the research are presented. The research design gives

considerable attention to the role of training on all organizational levels in industrial institutions. The attempt to examine industrial training policies was initiated in the hope of answering questions concerning the overall function of training in the organization, particularly the training of older workers.

CHAPTER III

RESEARCH DESIGN AND FINDINGS

Introduction

The occupational position of the older workers, as discussed in the preceding chapters, has produced a gap between the recognition of the need for training older workers and the actual amount of training offered them. The literature reviewed in this research gives no consideration to the amount of specific older-worker industrial training programs. Thus, this study seeks to answer some of the questions concerning training levels of older workers. Most authors recognize a training need, but few of them have actually initiated ideas concerning how this need may be fulfilled, whether fulfilling it should be of interest to employers, and what anticipated benefits the training of older workers will bring to the employee, the employer, and society.

The related literature seems to indicate that industrial training, to a great degree, is designed for the young, the specialized, and the promotable. In addition, training efforts most frequently occur within moderately progressive firms which feel that they can "afford to train." If an older worker should fall within one of the proper training

groups, then it is assumed that he would receive the same treatment as would other individuals. This training, however, is not designed solely to meet the needs of the older individual; rather it is normally designed to meet the needs of the organization.

This study attempts to make a start in determining the relationship between older worker training needs and their actual level of training--whether it be skill, supervisory, retirement, or any form of training that satisfies a need of the older age group. The premise underlying this effort is that, once the level of training is known, then the benefits may be more carefully judged, alternatives and corrective action may be advanced, future needs may be identified, and other social and economic variables may be more thoroughly analyzed. As stated in the first chapter, the hypothesis of this study is that there is a significant amount of industrial training specifically designed, planned, and applied within industrial organizations for workers forty-five years of age or older. This hypothesis is rejected, on the basis of the data collected in this study.

The methodology of this research is presented in the following pages. The actual results are presented in three sections: (1) economic characteristics of the firms, (2) overall training in the firms, and (3) levels of industrial training for the older worker.

Methodology

The data was collected through a questionnaire (see Appendix A). One hundred firms were selected on the basis of their sales volume and the number of individuals employed by the firm. Two other criteria, product line(s) and the location of the firm's national headquarters, were also used in an effort to provide a diversified sample of industry practices as well as to determine any regional emphasis upon training. Firms were chosen from Fortune's list of the country's 500 largest industrial organizations.¹ This selection was cross-referenced in Standard and Poor's Register of Corporations, Directors and Executives.²

The questionnaire development was achieved through an extensive analysis of both training and older worker characteristics. Questions are designed to measure as many organizational variables as practical in this level of research and the effects these variables have upon training. The questionnaire was redesigned several times after consultations with prominent training specialists in the Dallas area.³ In addition to their assistance in structuring the

¹"The 500 Largest U.S. Industrial Corporations," Fortune (June, 1970), pp. 182-200.

²Standard and Poor's Register of Corporations, Directors and Executives (New York, 1970).

³Statements by Lyndon D. Bates, Director of Training, Zale Corporation, Dallas, Texas, April 5, 1971; Arthur A. Hodge, Manager of Training, Texas Power and Light Company, Dallas, Texas, April 7, 1971; and John L. Quigley, Jr., Personnel and Training Director, Dr. Pepper Company, April 14, 1971.

questionnaire, these individuals provided guidance concerning the direction, feasibility, and value of the study. These comments were sought in an attempt to validate the importance of the hypothesis to the industrial community.

The questionnaire contains five sections: (1) General Information, (2) Training Within Your Firm, (3) Training Evaluation, (4) Training--Union Activities, and (5) Training of Older Workers. These sections were developed in order to facilitate a more comprehensive analysis of the relationship between organizational variables and their influence upon the level of training, with the emphasis being focused on the previously mentioned areas: promotion, unemployment, and retirement. A comparison of overall training policies and training policies for older workers is possible, because similar questions are provided in different sections. In addition to the use of this comparison technique, all questions concerning employees were classified into four job level categories: skilled, technical, supervisory, and top management. These categories were not specifically described in the instructions. However, it was thought that the problem of semantics would be minimized, for these terms normally carry a similar meaning throughout industry.

After completion of the questionnaire, a form letter was prepared and personally addressed to the various training officers (see Appendix B). The letter stressed the purpose of the study and possible benefits from an analysis of

the replies. A questionnaire instruction sheet was also included in the material forwarded to the firms.

In addition to the questionnaire, a limited amount of personal follow-up analysis was conducted in the Dallas-Fort Worth area. This analysis was accomplished by personal interview and telephone conversation. The personal follow-up was initiated so that certain points of contradiction or controversy could be clarified in the presentation of the final results.

Because of the extent of the questionnaire, it is difficult to itemize the results of each individual question. Such an extensive listing would be unnecessarily cumbersome and would therefore most likely serve no real purpose to the study, while also, in many cases, only confusing the reader. The findings are consolidated into three sections. Where appropriate, percentage totals are placed in parentheses to indicate and/or substantiate the positions of the organizations.

A total of twenty-three firms replied to the questionnaire. Of these replies, four firms were unable to participate in the study, either because the material requested was of an "extremely sensitive nature" or because company decentralization made it impossible to obtain relevant information to all the questions. The remaining nineteen firms supplied answers to most of the questions--the greater majority replying to each inquiry. As requested in the

instructions, a number of firms were eager to supply additional information, in the form of pamphlets, organizational charts, training schedules, and retirement bulletins, in an effort to supplement their answers and to facilitate an understanding of their policies. The most common complaint registered by the responding firms concerned the length of the questionnaire. On the other hand, several firms stated that they had adopted the questionnaire as a method of checking what their company should be doing in the area of training.

Results

Economic Characteristics of the Firms

The typical firm responding to the questionnaire employed 40,000 individuals: three non-exempt to every one exempt person, showed an increase in the number of employees over the past two years (54 percent), was engaged in international operation (100 percent), and was decentralized (80 percent). Almost all the firms (96 percent) had shown a sales increase over the last two years; 10 percent was the average increase. As attempted in the design of the study, organizational replies originated from varied types of industries (sixteen different product lines were reported). This diversification was further illustrated by the equal distribution of the findings applicable to machine-controlled production processes. Some firms were highly automated,

while others were significantly dependent upon human resources to produce the firm's products.

Probably the most interesting and significant reply to the section on general background concerned promotion policies. All the firms stated that they had a policy of promoting from within the organization. As shown in Table I, promotion considerations based on age were most prevalent among supervisory and top management personnel.

TABLE I

DATA PERTAINING TO CONSIDERATION OF AGE AS A FACTOR IN PROMOTIONS*

Employment Level	Always	Frequently	Infrequently	Never
Skilled	6%	6%	48%	40%
Technical	6	26	48	30
Supervisory	0	54	26	20
Top Management	6	54	6	34

Question: Would you say that, in your firm, age is (always), (frequently), (infrequently), (never) a consideration for promotion within these areas?

The training emphasis in many of the findings related to supervisory personnel. This was possibly due to (1) a more extensive knowledge of this group's training requirements by the company representatives, (2) an overall importance of this group's performance in attaining company objectives, and (3) a greater recognition of the need for training of supervisory personnel.

Training within the Firms

Training was a major department-staff function in all the firms. The surveyed industrial organizations had training programs for almost all the employees. Table II shows the percentages of firms reporting training programs.

TABLE II

PERCENTAGES OF FIRMS REPORTING TRAINING PROGRAMS

Employment Level	Percentage
Skilled	94
Technical	87
Supervisory	100
Top Management	80

The responsibility for training was normally placed within a specialized training section or department managed by a person who frequently carried the title of Training Director. One firm reported that this person supervised over 1,000 employees engaged in planning, developing, organizing, and operating training programs. The normal size of the training department was considerably smaller; usually these departments consisted of ten or fifteen individuals who were directly engaged in company-wide training activities. In most circumstances, the training director reported directly to the president or an administrative vice president of the company.

The training departments were responsible for the evaluation of training programs in 96 percent of the firms.

Training instructors were evaluated by all firms. In 80 percent of the companies, trainees provided a personal evaluation of the programs after their participation. All trainees on the supervisory level provided some form of personal evaluation. Only 75 percent of skilled employees provided a training evaluation. All firms used a written evaluation report. Sixty-seven percent also secured verbal evaluations from each trainee.

Typical replies to the question concerning the objectives of training programs included the following goals: to prepare employees for greater responsibility, to provide employees with better skills, to increase productivity, to improve performance, to develop attitudes consistent to corporate goals, and to meet manpower requirements. Only two firms stressed the need to increase employee personal development and satisfaction through the use of training.

The majority of the firms were unable to estimate how much training time per year was utilized to obtain the above training objectives. One firm did indicate that it allowed over ninety hours per year per worker; this was an extreme exception to the norm, for, in most firms, training representatives reported that an average of five hours per worker per year was allocated to the training function. Exceptions to this policy usually occurred in the training of supervisory personnel, for they frequently received twice as much training time as the other employees.

Almost half (42 percent) of the programs presented to the employees were developed by the firm's own training staff. The remaining programs were purchased from other sources: American Management Association, Dale Carnegie, university programs, consultants, etc. All the firms provided for training outside the facility, implying that the firms do recognize the importance of training certain employees in a location different from the everyday job environment.

One key finding showed the overall emphasis given training by some of the firms. The question concerned the amount of training expenditures. While operational costs have been increasing for all organizational resources due to inflation, the funds spent for training have increased in only 67 percent of the firms surveyed. This means that one third of those firms responding have not felt it beneficial to maintain or increase their training effort. This finding tends to support frequently-cited research opinions and comments of training specialists⁴ which claim that training is one of the first things "to go" when economic conditions become depressed. This finding was further supported in the study by the replies to the question on barriers to effective training. In order of importance, the barriers most frequently mentioned were (1) financial considerations,

⁴Ibid.

(2) worker job requirements, and (3) overall economic conditions. Two of the top three barriers have a direct relationship to the monetary position of the firm. Training seems to remain an expendable item on the organizational budget.

The training which is initiated in the firms surveyed utilized a variety of techniques and training equipment. Frequently noted training aids included films (100 percent); cases, charts, and graphs (94 percent); videotape and tape recorders (80 percent); and simulators and operational machinery (75 percent). All the firms used some form of on-the-job and seminar training. Ninety-four percent provided a segment of the firm's employees with educational assistance, and 67 percent had program instruction courses.

The findings concerning the function of training as it pertains to promotion, unemployment, and educational handicaps are shown in Table III.

TABLE III

FINDINGS CONCERNING THE FUNCTION OF TRAINING AS IT PERTAINS TO PROMOTION, UNEMPLOYMENT, AND EDUCATIONAL HANDICAPS

Question	Yes	No
Are your training programs designed to provide employees with skills to be used on their present jobs only?	25%	75%
Are your training programs designed to provide skills for promotion?	94	6
Does your firm practice the policy of allowing industrial training to replace formal educational requirements?	75	25
Are your training programs designed to provide skills for other employment?	48	52

These findings reveal that many organizational programs do provide employees with skills which they may use to enhance their occupational careers. Training seems to be a definite tool in preparing a person for promotion; it may also be a substitute for limited education. Probably the most favorable finding in the section, in terms of a positive national trend, is the fact that skills acquired in one company's training program may often be used in different companies and jobs. This finding might be attributed to coincidence; however, the wording of the question specifically asked if training programs were "designed" for the attainment of these types of skills. While only half the employers recognized this aspect of their responsibility to employees and society, the analysis indicates that some movement toward a "social ethic" is taking place in business operations.

While industrial organizations may be changing their concern for employees and society, the change they sought in trainees was, in most cases, not measured on a continuing basis. Forty-six percent of the firms stated that no attempt was initiated to measure employee change after the completion of a training program. Twenty percent measured change sometimes; 34 percent initiated steps to measure employee change on a continuing basis. Usually most firms evaluated training results after six months or one year following the completion of training. The lack of training follow-up by many

of the firms may be a part of the cause for the unstable position of training in organizations. Firms may eliminate a potentially valuable function, i.e., training, because they often fail to secure the necessary understanding of its benefits. In this regard, it is interesting to note that all the firms (100 percent) stated that they were able to identify the weaknesses of their training, while only 80 percent said they could also identify the strengths.

The majority of the questions in section four of the questionnaire, "Training--Union Activities," received negative answers. Many company officials felt that they were not in a position to reply on behalf of union officers, while several firms were outspoken on union activity. These latter firms stated that unions were a major barrier to the training of employees and that training had become a significant contract issue. Seniority, rather than training, seemed to be a major factor in insuring job security. Of the firms surveyed, the managerial representatives stated that they knew of no union training programs designed for the worker forty-five years of age or older.

Industrial Training for Older Workers

As previously mentioned, the hypothesis of this study was not supported by the replies of the surveyed firms. Only 11 percent of those firms responding had programs specifically designed for the older worker. Those firms forwarding

negative responses (89 percent) also stated that they were not considering or planning any future training programs for the older worker. The trend of the replies leads to the conclusion that the majority of the surveyed firms had failed to group older workers into a specific employment group. These firms simply held that older workers did not require training to meet their occupational adjustments. All the firms (100 percent) considered older workers in a training category identical to or "same as for other workers."⁵ Theoretically, the same amount of training is provided for older workers as that offered to other employees. This concept corresponds to the policy of establishing training which benefits the company first, rather than benefiting the individual. Even so, the trainees, undoubtedly will obtain certain intrinsic benefits from most training programs.

As shown in Table IV, the responses to questions five, six, and seven in section five varied from the replies provided in the section on overall training policies. A significant difference was noted in the replies to the questions concerning training designed to provide workers with skills for other employment. As noted previously, 48 percent of the firms stated that training programs were designed to provide the employee with skills he could utilize in

⁵See research questionnaire, Question 3, page 5.

TABLE IV
FINDINGS CONCERNING TRAINING PROGRAMS FOR OLDER WORKERS

Question	Yes	No
Are training programs for older workers designed to provide them with skills to be used on the present jobs only?	29%	71%
Are older worker training programs designed to provide skills for promotion?	57	43
Are older worker training programs designed to provide skills for other employment?	14	86

other jobs. In contrast, only 14 percent said that training for older workers was designed to provide these employees with the same type of skill. This finding was compiled from both those firms having training for older workers and those who did not have such training. Thus, the implication of this action is that, if a firm did establish training for older workers, it would not be designed to equip them with skills they could use in other jobs.

The main conclusions drawn from section five of the questionnaire pertain to the attitudes of the firms toward training older workers rather than to the amounts of such training. Firms either believe that older worker training is not needed, they fail to recognize the need for this training, or they recognize the need but have taken no steps to satisfy it. Indications are, however, that some firms do realize the impact of scientific and technological change upon the older employee. Twenty-two percent stated that

automation has increased the need to train older workers, and a large 83 percent of the firms had some form of retirement planning and/or counseling.

In this regard, possibly the most favorable aspects of the firm's policies, insofar as older worker benefits are concerned, related to retirement problems. The most frequent treatment of retirement difficulties seemed to be associated with the need to establish an early retirement plan (83 percent of the firms had such a plan). A surface "yes" or "no" to retirement questions, of course, only suffices to show an interest in certain retirement concepts. An early retirement plan leaves much unsaid about retirement adjustment. However, the interest by the firms in this issue, an issue which ultimately affects every worker, could possibly pave the way for future retirement training arrangements. These arrangements might stress retirement planning and the social and economic conditions each person may encounter when he retires.

The small minority (11 percent) of those firms who had provided training for older workers were unable to indicate what percentage of training funds were allocated to these individuals. In addition, these firms did not outline the types of programs provided to older workers. It is possible that some of the training was designed to meet the changing job responsibilities of the older employee, for 38 percent

of the firms stated that special consideration in the form of reduction in physical job requirements is provided to older workers.

In the final analysis of this section, one is able to view the continuation of an industrial self-interest trend formulated from many of the answers to the preceding questions. This trend was substantiated in this section by 83 percent of the firms, who stated that talent, regardless of age, is a major consideration for training. The implied belief is that, since the organizations are paying for the training (100 percent stated that programs are totally financed by the firm), they hold the prerogative to train those individuals who will most likely benefit the company. Thus, it seems unfortunate that, in many cases, older workers' needs do not necessarily correspond to company objectives.

Summary

A questionnaire was developed and sent to 100 of this nation's largest industrial firms. The questionnaire sought to provide data on the industrial training function and the level of older worker training in each of the organizations. Twenty-three percent of the firms replied; however, only 19 percent of the replies were utilized in the formulation of the results. The hypothesis of the study which concerned the level of industrial training specifically planned, designed, and applied for workers forty-five years of age

and older was not supported by the findings. Eighty-nine percent of the firms stated that the organization had no training specifically for the older worker and that the training they received came through their participation in programs designed for all employees.

While the training function on an overall company-wide level did provide some assistance to employees who might become unemployed (48 percent of the firms stated that skills for other employment were incorporated in their training programs), the same training was either not felt necessary for older workers or was presented on a basis of talent rather than age (14 percent presented this skill training for older workers). Training was definitely a major tool used in preparing workers for promotion. This finding was further substantiated by the fact that training was designed in 75 percent of the firms as a function which prepared all workers (including older workers--71 percent) for jobs within the organization that were different from their present job. Training was also shown to be of value in compensating for formal educational deficiencies.

The firms had a wide variety of training aids and techniques. These elements of the training function were utilized to train all employment levels. A definite emphasis was placed upon the training of supervisory personnel. Retirement problems seemed the most likely area in which training for older workers would begin. The need for guidance in

this area was realized by several firms, and the possibility for implementation of a program might well fit into the already established pre-retirement plans.

A possible conclusion to be drawn from this chapter is that it seems likely that major changes in firms' beliefs must first occur before any significant amount of older worker training is presented in industry. Organizations seem well established in the training field: they have the necessary staffs, the necessary tools, and a sound knowledge of the training function. The question seems to be whether they want to utilize a segment of organizational resources to benefit another segment of its human resources. In the final chapter, this particular point, along with other recommendations and conclusions, will be discussed.

CHAPTER IV

CONCLUSIONS AND RECOMMENDATIONS

Introduction

In the past chapters of this study, considerable emphasis has been placed upon the employment, promotion and retirement of older workers. Consequently, a majority of the discussion has sought to establish an occupational status common to many of these workers. With this objective in mind, the material has included findings relevant to older worker handicaps, capabilities, and needs. These findings have helped to formulate conclusions concerning the amounts of industrial training required within this older age group. Training in this regard would be specifically designed to enhance older worker promotional and employment opportunities. In addition, industrial training programs would also establish the objective of seeking better to prepare the older worker for retirement. While the relevance of the need for training is dependent, to a great degree, upon the occupational position of an older worker, the reverse is true once a need is recognized. Training then becomes one of several key processes in the overall improvement of the worker's occupational classification.

After the background information was obtained and the relevance of the material analyzed, a practical test was designed and initiated to measure the actual amount of industrial training for older workers. The hypothesis of this study was rejected. The results revealed that a majority of the industrial firms surveyed (89 percent) did not have training specifically designed for older workers.

The recognition of the objectives of the study, the discussion of available research on the topic, and the presentation of this study's findings have now set the stage for conclusions and recommendations. Therefore, in this chapter, the discussion summarizes the research and findings in a manner which clarifies the actual training status of many older workers in industrial organizations. This review emphasizes the role of training and its influence upon these workers' occupational positions. Second, the chapter recommends several industrial changes which might improve the older workers' economic and social status in and outside of their firms. Again the emphasis is on the role of training. Finally, the last area of concern focuses upon the need and practicality of additional research which may benefit the older worker, his employer, and society.

Conclusion

The Older Worker and the Industrial Organization

The older worker in this society must engage in labor market activity just as must any other worker. He must seek and find employment in order to provide for his needs. In addition to finding employment, however, he must prepare himself for permanent unemployment--society has labeled this "retirement." The abstraction of "retirement" undoubtedly has a variety of meanings, depending, of course, upon one's association with experiences contingent to retirement activities. The emphasis in this study is upon the need for industrial organizations to realize a portion of their responsibility to older employees. However, the recognition of this responsibility is useless unless accompanied by action which facilitates the elimination of certain problems. Results of this study indicate a need for action in the form of the establishment of industrial training programs designed to make both employment and retirement more rewarding for the older worker. These programs are considered necessary because firms often hold stereotyped images of older workers and, thus, often fail to consider the potential value of the older worker to the organization. These attitudes, in turn, contribute to the overall desirability--or undesirability--of these workers in the labor market, ultimately fostering either formal or informal age discrimination. Training

could possibly compensate or help individuals to overcome the burden of certain stereotypes and thus reduce age discrimination.

One must recognize the possible danger of limiting organizational initiative when suggesting that firms dedicate a major effort to satisfying the social and/or employment ills of a certain age or occupational group. It is possible that far too many social-minded individuals might eagerly jump on the bandwagon of social change through industrial effort. Therefore, the attitude of total industrial responsibility for an employee's welfare is not advocated or even implied in this study. Instead, this study stresses the need for an alteration of certain industrial beliefs which place major priorities on the economic roles while limiting or neglecting moral and social roles. The evidence which establishes the existence of these industrial beliefs was present in both the literature surveyed and the replies of the firms.

The majority of the firms replying to the questionnaire had developed and employed highly-sophisticated training techniques in order to, as one firm stated, "develop employee attitudes which are consistent with corporate goals." This training, in most cases, did have some beneficial effects on employees. However, what seems more indicative of the interest in "profit-oriented objectives" is the fact that, within the last two years, one third of the firms had

reduced their overall training effort. Training in these cases was viewed as a cost that could not pay the required dividend. This development, along with other reported training practices which emphasize only productivity and industrial self-interest, seem to indicate that employers regard training as a means of increasing profits, to be used when economically feasible, and not necessarily as a means of increasing the satisfaction of the worker's adjustment to his job and his retirement.

While increased productivity does not always conflict with older worker training objectives, it may act as an employer's rationale for restricting the participation of these workers in certain programs. This action seems possible in situations where older workers find themselves in stationary positions in the firm, and organizational authorities see no need in "wasting" training expenses on the person who has only five or ten more years until retirement. Some authors have speculated on the results of individual "shelf-sitting," indicating that apathy, dissatisfaction, and possibly decreased performance may evolve into a sense of denied self-development. In addition, possible changes in the organizational structure, in the form of plant shut-downs and relocations, mergers, and technological and scientific advancements, often result in many of these employees being dismissed. When this happens to the older worker, he is placed in the aggressive labor market, forced

to enter a new role, seek employment, and, in many cases, compete for existing vacancies with applicants who have youth on their side.

Although many workers encounter the barriers of age discrimination when unemployed, the vast majority remain employed until retirement. However, even the employed older worker must face the fact that sooner or later retirement will end his employment. All workers must at some point retire. Planning for retirement in this country can therefore no longer remain a middle- or upper-class concept. Retirement training provided by the firm should equip all employees with some idea of what they may expect after employment has ended. Many older workers, while on the job, simply repress the idea of planning for retirement. Thus, training for retirement may simply become the only formal organizational forum for a discussion of the problems that frequently accompany this change.

In the final analysis of the older worker and his organization, one is able to draw upon several basic practices to formulate tentative conclusions. These conclusions are not applicable in all cases. However, in general, it seems that older worker stereotypes allow industry little latitude in utilizing these workers' capabilities. These beliefs are frequently damaging both to older workers who are eager for promotion and to those who are seeking new employment. In many cases, firms do not seek to identify

and/or develop variations in older workers' performance levels. Frequently, promotion and employment opportunities offered to these individuals are limited by the anticipated lower return on the "investment." A solution to part of the problem of this stereotype rests in changing the training characteristics of the firms and seeking to explore and develop, through the use of previously established training methods, the potential skills these workers are willing to contribute. Finally, firms, after drawing upon the talents of these workers for as many as thirty or forty years, have certain responsibilities to see that they receive some assistance in preparing for the change in their life's routine which retirement brings. Present indications imply that many older workers are not "ready" for retirement and that the industrial organizations offer little or no assistance to prepare them for it.

Change in the Industrial Organization

Naturally, the major change advocated in this study is the development and application of industrial training designed to meet the promotion, new employment, and retirement needs of older employees. This statement, however, remains incomplete until one considers on a practical plane the steps which must be taken to insure that the necessary changes are made. The types and specific purposes of this training must be determined. It is also likely that

industrial institutions will require some amount of governmental persuasion before the evolution of industrial thought will approach the recognition of certain social responsibilities. A major point to be considered is how long this process will take and to what degree industrial organizations will cooperate in providing employees with training programs. As previously indicated, certain steps have already been taken by the government;¹ this legislative effort, however, does not seem to be enough to insure training for older workers. Governmental activities normally concentrate on older worker placement problems. The role of training, as reported in a Wisconsin study,² seems to give way to more immediate objectives of the disadvantaged individuals. As reported in this study, training was initially an essential part of each project; however, the administrators found that

the characteristics of the selected clients were not suited to the on-the-job openings; the beginning wages and the location of the training slots were not such as to motivate older workers; and just as the older workers considered training to be a questionable investment for themselves, so did potential employers.³

¹See Address by Clarence T. Lundquist, "The Age Discrimination in Employment Act," Monthly Labor Review, XCI (May, 1968), 48-51.

²Gerald G. Somers and others, The Training and Placement of Older Workers: An Evaluation of Four Community Projects (Madison, Wisconsin, 1967), pp. 194-195.

³Ibid.

Contrary to governmental classes, which depend to a large degree on the number of trainees available at a given time, industry has employees available on a daily basis. These employees, once trained, would be able to realize training benefits on a continuing basis, in the form of promotion, retirement adjustment, or, if necessary, when they become unemployed. The training initiative should thus come from within the firm. Older worker training objectives need not be designed so as to isolate a certain growing job sector and then to train workers for placement in these jobs. That approach is unrealistic and economically impractical. However, certain general skills may be taught in many varied programs. These skills can often be applied in jobs which require good judgment and experience as opposed to specific expertise. It is also possible to view the older individual as being qualified for advancement in the organization. In this case, age should not block his participation in training that would enhance this opportunity. Finally, a last occupational need of the older worker, retirement training, is applicable to almost all individuals employed in industrial firms.

Two additional recommendations should be considered by industrial organizations. The changes evolving from these recommendations relate to the amount of training desirable in industry and a general purpose of such training. These changes closely correspond to meeting the training needs of

older workers. However, they are concerned more with the benefits training provides to every employee rather than the benefits to a special group. The findings of this thesis reveal that the level of training was declining in one third of the firms surveyed. This trend should be reversed, and training should become an essential element in all organizational activities. The elaborate training techniques and programs developed by industry and training specialists should be used on a constant basis. The firms should take time to see that each employee learns skills and general knowledge that will keep him abreast of the changing technological conditions.

In addition, training should be designed so that the employee can draw upon his training experiences and increase both his intrinsic and extrinsic satisfaction on the job. The training class should emphasize problem-solving techniques; it should offer steps which may be used to make supervisory personnel more receptive and empathetic towards the needs of their subordinates. The concepts of job design, employee participation, effective motivation, and adequate communications should be stressed in these programs. All these concepts should be offered to the employee, not only because they may increase productivity, but also because they can increase a person's appreciation and satisfaction in an activity that takes up a high percentage of one's life--work.

The dividends or profits, the report cards of industry, constitute management's primary goal. This orientation must be readjusted; the employee and the overall development of this nation's human resources must be graded. So far, many indications lead to the conclusion that the industrial "marks" on human development are too low. Industrial training for all the employees can hopefully raise a person's appreciation for his occupation and increase the benefits which industry provides to society.

Recommendations for Further Research

The major emphasis of any additional research should concentrate on (1) the actual amount of industrial training, (2) types of training provided to the employee, and (3) the amount of training designed to meet a specific group's needs. It seems that a considerable effort is required in all of the above areas. Firms are often hesitant to provide information on their training activities; in some cases, they believe that the information requested is of an extremely sensitive nature. This barrier and other factors relating to the collection of information must be overcome. All firms should seek to cooperate with government, universities, and independent researchers so that ultimately some solutions to problems of human resources utilization may be advanced.

The recommendation concerning the amount of training would include an analysis of the position of training in the organization. Undoubtedly, the importance a firm places on

the training function will help determine the amount of training. Thus, the importance of training to firms must be more accurately determined. The barriers to training which evolve from an economic rationale or a social belief should be identified and analyzed in future research. In addition, factors relating to monetary expenditures for training as such, training staff levels, training techniques, and evaluation methods require closer study.

To assist industry in its training roles, research should be initiated in an effort to facilitate the establishment of programs for workers who are in need of training. This process would include an evaluation of training techniques so that proper methods could be applied in the various programs--programs which would, in turn, be designed to meet various trainee needs. The research conducted in this area would, therefore, assist the organization in the identification of training objectives and ultimately result in maximum trainee benefits. Firms should be willing to establish programs for workers who must adhere to company policies. An example of this point can be developed from the premise that, if mandatory retirement policies are adopted by the firm, then it seems necessary to expect the firm at least to initiate a pilot program to determine the value of such training. Additional programs should be applied in all areas where social and industrial prejudice has handicapped a group of workers. Psychologists and

sociologists should seek to determine the individual motivations of workers and endeavor to apply knowledge within a framework that will assist in their training. Key research related to these actions would focus on an evaluation of the results.

Research initiated to treat the problems of training for specific occupational groups should emphasize an analysis of changes in society. These efforts must be directed toward determining the significance of technological and scientific change. The solutions evolving out of this analysis should maintain that action taken must minimize the displacement of specific employment groups and facilitate more flexible relocation and retraining processes.

The fact that industry may have to consider the problems of the older workers seems no different from the fact that industry must work with problems of racial discrimination, national poverty, and issues which treat the social ills of this nation. Training can play an immediate and meaningful role in this process. Industry should give it the chance to do so.

APPENDIX A

INDUSTRIAL TRAINING

PART I. General Information

1) How many individuals does your firm employ in the following areas:

_____ non-exempt
_____ exempt

2) How many employees did your firm have in:

_____ 1968
_____ 1969
_____ 1970
_____ 1971
_____ Forecast for 1972
_____ Forecast for 1973

3) How many separate facilities are in your organization:

_____ (including stores, manufacturing plants, offices, etc.)
_____ How many states

Does your company have international operations:

_____ yes _____ no

What countries: _____

4) Is your company centralized _____ or decentralized _____.

5) What is your firm's major product line(s) _____

6) Has your firm's sales volume increased _____ or decreased _____ over the last three years? How much (in percentage) _____

7) Is any part of your firm unionized:

_____ yes _____ no

How many different unions: _____

In what areas: blue-collar _____ (number of unions)
white-collar _____

8) Approximately what percentage of all employees are engaged in:

_____ line jobs
 _____ staff jobs

What percentage of exempt employees are engaged in:

_____ line jobs
 _____ staff jobs

9) Would you say that production processes are machine controlled in:

- a) _____ 0-25% of company operations
 b) _____ 25-50% of company operations
 c) _____ 50-75% of company operations
 d) _____ over 75% of company operations

10) Are job descriptions provided for each job:

_____ yes _____ no

11) Has your company diversified its operations in the last five years:

_____ yes _____ no

Please indicate the manner of this diversification: _____

12) Does your firm have a policy of promotion from within the organization:

_____ yes _____ no

13) Would you say that in your firm age is always, frequently, infrequently, never a consideration for promotion within these areas:

- a) skilled _____ always _____ frequently
 _____ infrequently _____ never
- b) technical _____ always _____ frequently
 _____ infrequently _____ never
- c) supervisory _____ always _____ frequently
 _____ infrequently _____ never
- d) top management _____ always _____ frequently
 _____ infrequently _____ never

PART II. Training Within Your Firm

1) Does your firm have planned training programs for the following groups:

- 9) What type of training equipment (training) aids are used in company programs:
- | | |
|---|--|
| <input type="checkbox"/> simulators or simulations | <input type="checkbox"/> tape recorders |
| <input type="checkbox"/> cases | <input type="checkbox"/> videotape |
| <input type="checkbox"/> charts and graphs | <input type="checkbox"/> operational machinery |
| <input type="checkbox"/> films | <input type="checkbox"/> all of these |
| <input type="checkbox"/> other (please specify) _____ | |
- 10) Have your expenses for training increased in the last three years:
- yes no
- What is the annual percentage increase in the training budget: _____
- 11) How are the organizational needs and goals upon which your training is based identified: _____
-
- 12) What are the major objectives of training in your organization (please give brief statement): _____
-
- 13) Are your training programs designed to provide employees with skills to be used on their present jobs only:
- yes no
- 14) Are your training programs designed to provide skills for promotion:
- yes no
- 15) Does your firm practice the policy of allowing industrial training to replace formal job educational requirements:
- yes no
- 16) Are your training programs designed to provide skills for other employment: yes no
- 17) Please rank the following in 1-2-3 order as to their significance as possible barriers to effective training (feel free to add any problem areas not listed):
- | | |
|--|--|
| <input type="checkbox"/> financial considerations | <input type="checkbox"/> worker resistance |
| <input type="checkbox"/> overall economic conditions | <input type="checkbox"/> union pressure |
| <input type="checkbox"/> worker job requirements | <input type="checkbox"/> lack of training programs |
| <input type="checkbox"/> other (please specify) | |
-

PART III. Training Evaluation

1) Is the area responsible for formulating training programs responsible for their evaluation: _____ yes _____ no

2) Do trainees provide personal evaluation of programs after participation in training: _____ yes _____ no

At which of the following trainee levels is evaluation provided:

_____ skilled _____ technical
 _____ supervisory _____ top management

What means is used:

_____ verbal feedback _____ written report
 _____ other (please specify) _____

3) Is the training instructor evaluated: _____ yes _____ no

4) What other aspects of training are evaluated (please specify): _____

5) Are training evaluation methods able to identify program: _____ weaknesses or _____ strengths

6) What methods are used to identify the results of training: (Briefly explain) _____

Does your firm establish a base from which you train:

_____ yes _____ no

Is "change" in employees' attitudes and behavior measured in comparison to this base: _____ yes _____ no

At what intervals is change evaluated:

_____ one month after training
 _____ six months after training
 _____ one year after training
 _____ longer period (please specify) _____

7) Are employee attitude surveys taken to help establish programs: _____ yes _____ no

8) What type of performance review is utilized after training: (Please indicate) _____

PART IV. Training--Union Activities

- 1) Does the union provide training for its members:
 _____ yes _____ no. If yes, what type of training
 (please specify): _____
- 2) Does the union provide specialized training for older
 workers: _____ yes _____ no.
- 3) Does training provided by the union supplement the firm's
 training: _____ yes _____ no
- 4) Is training considered an issue to be negotiated in
 contract bargaining sessions: _____ yes _____ no
- 5) Is training considered by the union to be a step in
 insuring job security for the workers: _____ yes _____ no

PART V. Training of Older Workers

- 1) Does your firm have specifically designed training
 programs to meet the needs of older workers (45 years of
 age and older) in these categories:
- | | | |
|-----------|----------|----------------|
| _____ yes | _____ no | skilled |
| _____ yes | _____ no | technical |
| _____ yes | _____ no | supervisory |
| _____ yes | _____ no | top management |
- 2) If no programs are provided for older workers, is your
 firm considering or planning for training of these indi-
 viduals in the future: _____ yes _____ no
- 3) What type of training programs are provided for older
 workers (please provide list if available):
- _____ same as for other workers
- _____ special programs designed to meet older workers'
 job handicaps
- _____ more on-the-job training than for other workers
- _____ greater amount of supervisory training and counsel-
 ing
- _____ recreational and health training programs
- _____ other: please specify _____
-
- 4) Approximately how much time and at what cost per employee
 has your firm allocated for training older workers:

- Has the time and cost of training older workers increased
 in the last two years: _____ yes _____ no

How much (percentage): _____

- 5) Are training programs for older workers designed to provide them with skills to be used on their present jobs only: _____ yes _____ no
- 6) Are older worker training programs designed to provide skills for promotion: _____ yes _____ no
- 7) Are older worker training programs designed to provide skills for other employment: _____ yes _____ no
- 8) As the worker progresses in age is he given special consideration through the use of:
- _____ yes _____ no a) job redesign programs
- _____ yes _____ no b) shifting of duties to younger employees
- _____ yes _____ no c) reduction in physical job requirements

Please provide information concerning form of consideration: _____

- 9) Who develops training programs for older workers (organizational department): _____
- 10) Is training provided to older workers in order to compensate for the lack of educational requirements for certain jobs: _____ yes _____ no
- 11) What has motivated your firm to establish programs for older workers:
- _____ economic reasons, i.e., profits and growth
- _____ social pressure
- _____ firm's moral beliefs
- _____ governmental pressure
- _____ union pressure
- _____ other--please specify _____
- 12) How are these programs for older workers financially sustained:
- _____ totally by your firm
- _____ by your firm and the government
- _____ by your firm and unions
- _____ by the government
- _____ other--please specify _____
- 13) Has automation in your firm increased the need to train older workers: _____ yes _____ no

- 14) If you have a union, does the contract agreement enhance _____ hinder _____, or have no effect _____ upon the training of older workers.
- 15) Is training for all workers based upon a job seniority system rather than age considerations:
- | | | |
|-----------|----------|-------------------|
| _____ yes | _____ no | a) skilled |
| _____ yes | _____ no | b) technical |
| _____ yes | _____ no | c) supervisory |
| _____ yes | _____ no | d) top management |

Is talent, regardless of age, a consideration for training: _____ yes _____ no

What other factors are used in selecting trainees: _____

- 16) Does your firm have an early retirement plan:
_____ yes _____ no

Does your firm have a training program which prepares older workers for retirement: _____ yes _____ no

At what levels in the organization is this provided:

- 17) Is any retirement counseling provided to the individual worker before he retires: _____ yes _____ no

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APPENDIX B

Dear Sir:

I am engaged in research for the Manpower and Industrial Relations Institute at North Texas State University. I am currently conducting a study to determine the level of industrial training for older workers, i.e. those individuals 45 years of age and older. I hope that you will understand that the extent of this study has made it impossible for me to send out a personally addressed letter to your firm, and has thus compelled me to utilize this rather impersonal form letter. I wish, however, to state that I am sincerely interested in your reply and will certainly appreciate your effort in my behalf.

The Manpower and Industrial Relations Institute is engaged in research concerning contemporary problems of manpower utilization. We at the Institute believe that numerous and varied social and economic issues relate directly to these problems of manpower utilization. My analysis in this study therefore concerns the allocation of organizational resources for the training of older workers: training in order to (1) facilitate promotional opportunities at the older age levels, (2) assist and guide older individuals toward adequate and rewarding retirement, and (3) provide each older person with up-graded skills and help him adjust to technological change and possible unemployment. I believe that corporations are interested in the analysis of this training issue, for findings will provide some implications for decisions contingent to overall corporate policy and effective manpower utilization.

The enclosed questionnaire is the major tool in developing my information base. My hope is to encourage your organization to consider the issue at hand and respond by completing the questionnaire.

Thank you for your cooperation in this study

DeWitt Whitaker
Research Assistant

Questionnaire Instructions

This questionnaire is divided into five sections: General Information, Training Within Your Firm, Training Evaluation, Training--Union Activities, and Training of Older Workers. Answer section four only if applicable to your firm. The questions are structured in such a manner that, in the majority of cases, replies may be given by simply checking the space provided. Some questions require a brief statement on data concerning your firm. In addition to this statement, all company material which would expand upon the answers to these questions would certainly be appreciated. Any information provided will be held in the strictest confidence and only utilized in determining the results of this study.

Section V, Training of Older Workers, concerns the hypothesis of this study and is therefore of the greatest importance. However, information in the other sections is needed in order to amplify and provide a context for the overall findings.

Firm's Name _____

& Address _____

_____ Zip

Your Position in the Firm _____

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