

## Older workers' perspectives on training and retention of older workers: Support document – South Australian aged care workers study

DAVID LUNDBERG  
ZANIAH MARSHALLSAY  
UNIVERSITY OF SOUTH AUSTRALIA

This document was produced by the authors based on their research for the report, *Older workers' perspectives on training and retention of older workers*. The report is available on NCVER's website: <<http://www.ncver.edu.au>>.

The views and opinions expressed in this document are those of the author(s) and do not necessarily reflect the views of the Australian Government, state and territory governments or NCVER. Any errors and omissions are the responsibility of the author(s).

© Australian Government, 2007

This work has been produced by the National Centre for Vocational Education Research (NCVER) on behalf of the Australian Government and state and territory governments with funding provided through the Australian Department of Education, Science and Training. Apart from any use permitted under the *Copyright Act 1968*, no part of this publication may be reproduced by any process without written permission. Requests should be made to NCVER.

# Contents

---

Tables and figures	3
Older aged care workers in SA	5
SA aged care workers & the LHMU	5
The South Australian aged care workers case study	5
SA aged care workers survey	9
Quantitative survey responses	9
SA aged care – qualitative responses to question 23	17
SA aged care – qualitative responses to question 24	18
Discussion of the issues	19
Conclusions	21
References	22
Appendix A	23

## Tables and figures

---

Table 1:	Gender of respondents	9
Table 2:	Age range of respondents	9
Table 3:	Respondent's expectations of dependants beyond respondent's retirement age	9
Table 4:	Respondent's expectations of retirement accommodation	10
Table 5:	Respondent's expectations of retirement income	10
Table 6:	Respondent's awareness of incentives or disincentives to work beyond retirement age	10
Table 7:	Qualitative response rate on incentives or disincentives to work beyond retirement age	11
Table 8:	Respondent's plans for activities other than work beyond retirement age	11
Table 9:	Attitude of colleagues or work-mates towards older workers working beyond retirement age	11
Table 10:	Employer's attitude towards older workers working beyond retirement age	12
Table 11:	Employer attitude to supporting training for older workers beyond retirement age	12
Table 12:	Respondent's attitude towards older workers working beyond retirement age	12
Table 13:	Respondent's preferences if working beyond retirement age	13
Table 14 A:	Qualitative response rate on respondent's current work	13
Table 14 B:	Qualitative response rate on respondent's preferred work beyond retirement	13
Table 15:	Respondent need training to work beyond retirement age	14
Table 16:	Qualitative response rate on training needs (of those who answered yes to question 15).	14
Table 17:	Availability to the respondent of the types of training required to work beyond retirement	14
Table 18:	Training to increase respondent's productivity in work beyond retirement age	15
Table 19:	Availability to the respondent of productivity-enhancing training	15
Table 20:	Would 'Train the trainer' courses assist older workers to train younger workers	15
Table 20A:	Q12 Own Attitude & Q20 Trainer Cross-tabulation	16
Table 21:	Gender differences in access to training and employment opportunities for older workers	16
Table 22:	Need for training of supervisors and younger workers against age-biased stereotypes	17

Table 23:	Qualitative response rate on most effective training for work beyond retirement age	17
Table 24:	Qualitative response rate on policy changes required for work beyond retirement age	18

# Older aged care workers in SA

---

## SA aged care workers & the LHMU

The Liquor, Hospitality and Miscellaneous Union was the industry partner of the researchers and NCVET in this South Australian aged care workers survey project.

In South Australia, members of the Liquor, Hospitality & Miscellaneous Union come from a wide range of occupations including hospitality, property services, health, manufacturing and community services. Aged care workers are represented in the LHMU which started off in 1915 as a union of watchmen, caretakers and cleaners.

Almost 60 percent of LHMU members are women, and over half are from non-English speaking backgrounds. A large number of members work on casual or part-time basis, with almost one-quarter of members not engaged in full-time work (LHMU guide for university students).

In the present study of older workers (aged 45 and above) and their perspectives on training and retention of older workers, total responses were 194 out of a state sample of union members in the age-group 45 and above. Of these responses, 181 (93.3 percent) were women, and 13 (6.7 percent) were men. These figures correspond to the national figures for employed persons in the Health and Community Services Industry where Aged Care workers come under. In 2003, the Industry comprised 44 percent of male workers, and 56 percent of female workers (ABS 2003).

## The South Australian aged care workers case study

This study is an effort to discover and analyse workers' viewpoints to inform public and policy debates about that important aspect of the "ageing" workforce issues. While many commentators have argued that older workers will need to be persuaded to continue working longer, the views of older workers have been missing from the public discussion of these issues. Many of Australia's policy analysts in government, industry associations and 'think tanks', politicians and media commentators have argued that since older people make up an increasing share of Australia's population, older workers will need to continue working longer. The views of older workers have been missing from the public discussion of these issues.

The purpose of this study was to identify and analyse older worker's perspectives on training and retention of older workers, to determine what training and other complementary policy measures are likely to work best to foster retention of older workers as efficient and effective workforce participants.

This research into the perspectives of older workers (aged 45 and above) on training and retention of older workers encompasses survey-based studies of older workers in three industry categories represented by four union organizations. The research included:

- a national survey of older workers in the finance sector who are members of the Finance Sector Union;
- a Victorian state survey of aged care workers who are members of the Health Services Union of Australia;
- a South Australian survey-based case study of aged care workers who are members of the Liquor, Hospitality and Miscellaneous Union in South Australia;
- a South Australian survey-based case study of construction industry workers who are members of the Construction, Forestry, Mining and Energy Union.

Respondents from these three industry categories consist of older workers in economically and socially important occupations with a VET-sector training base, a balanced gender mix and varied skill profiles, all substantially affected by technological change. The Health Services Union of Australia covers aged care workers in the Eastern states of Australia, and the Liquor, Hospitality and Miscellaneous Union, which covers aged care workers in the South Australia and Western Australia. Aged care workers are a skilled and predominantly middle-aged female health services occupation that will encounter increasing demand as the aged proportion of the Australian population increases. The Construction, Forestry, Mining and Energy Union covers a cluster of construction industry occupations with a predominantly male workforce that has a varied skill profile. The occupations are of significant and growing importance as productive contributors to the Australian economy. The Finance Sector Union covers an economically strategic service sector with a more balanced gender mix and a diverse skill profile that is subject to particularly rapid technological change.

Given the impracticality of establishing names and addresses of the total population of older workers in the finance, aged care and construction industries, the target populations for this study were older workers in these industries who are members of four unions. The study is based on a national survey of older workers in the finance sector, a state survey of older workers in the Victorian aged care industry, and survey-based case studies of older workers in the South Australian aged care and construction industries.

The authors greatly appreciated the cooperation of the four unions. The formulation of the survey questionnaire and validation of the interpretation of survey findings was guided by qualitative focus group research. The project team considered the project to be one in which NCVER and participating union organisations had mutually complementary interests. For the union organisations, research that reports older worker's perspectives on training and retention of older workers will inform public policy on a dimension that is frequently over-looked, and NCVER had a report done that is probably otherwise neither affordable nor feasible. A national household survey seeking responses from older workers could avoid this bias, but it would be absurdly inefficient and expensive. The project team regarded union membership lists as the best available base for cost-effective survey research on older worker's perspectives on training and retention of older workers. The project team knew of no practicable alternative source of a population frame with occupation, age and contact details. Without such a means of access, survey research on older worker's perspectives could not be cost-effective and is probably not even practically feasible. Furthermore, the project team did not know of any reason why union membership lists should be systematically biased on any matter of relevance to the subject-matter this research, unlike some other issues (for example) workplace relations policies or political issues, in which such a bias would be a substantial consideration. The overall report's specific findings include particular training needs, and that most workers expect to continue working

beyond retirement age, so that increasing retention requires removal of discriminatory policy disincentives, stronger measures against age discrimination, and attitudinal changes in age-related stereotypes. These are matters on which it is likely that most older workers would agree, whether or not they are union members, but some younger people may differ from older people.

Taken together, these three industry categories provided an excellent basis for identifying and analysing older worker's perspectives on training and retention of older workers, in economically and socially important occupations with a VET-sector training base, a balanced gender mix and varied skill profiles that are all being substantially affected by technological change. This research can inform national policy debates by providing older worker's perspectives on what training and other complementary policy measures are likely to work best to foster retention of older workers as efficient and effective workforce participants.

This project methodology involved an inherently ethical approach to the participant older workers. The creative interaction between qualitative and quantitative research in the research design secured the benefits and minimised the effects of the limitations of each type of research. The initial round of focus groups shaped the specific issues addressed in the survey questionnaire. The survey questionnaire tested the generalisability of the first round focus group findings. Union membership lists for older workers provided a means of accessing samples of older workers in the three industry categories. The bias involved in surveying union members is unlikely to have had significant effects on issues of the type that this survey addressed. A second round of focus groups validated the interpretations of the survey data by the principal researchers and informed the overall findings of the research project.

The first stage, preparation and qualitative focus group research, consisted of liaison to finalise arrangements for participation by the four industry partners, a literature review of trends in employment and training of older workers, Australian labour market statistics on growing and declining industries, and worker profiles affecting the skill requirements and employment prospects of older workers and preparation of a draft questionnaire instrument. The issues addressed in the project were discussed with three focus groups, each consisting of a small selective sample of older workers from the participating industry partners. This tested the questionnaire for use in Stage 2, particularly the relevance of issues that we proposed to incorporate into the survey questionnaire, and provided input from older workers in the relevant occupation group to go beyond issues suggested by our literature review.

It was generally understood that while it might be precise, it would be entirely misplaced and false precision to purport to impose an arbitrary "one size fits all" definition of "retirement age" on respondents in contexts as diverse as those studied. The respondents could be expected to know the retirement age for people of their gender in their industry and they would respond in terms of what "retirement age" means for them

The second stage, quantitative data collection, consisted of administration of the questionnaire instrument (see Appendix A) to four substantial samples of workers over 45 who are members of one of the four participating unions. The procedure used for drawing the four survey samples was "systematic sample with a random start" (Babbie, 1990, 83-85). A number was selected by chance from a small set (a number from a small set was drawn from a bowl by an uninvolved person) and that number chosen by chance was used to determine the random start of a sample chosen systematically. For the South Australian aged care case study, the sampling ratio was approximately 2:3, so the sampling interval was that every third name after the random start was excluded, until the total sample was drawn. The samples drawn and the response rates in each of the four surveys or case studies are provided in the following survey samples and response rates table.

### Survey samples and response rates

Participating unions	Finance Sector (FSU)	Aged Care (HSU)	Aged Care (LHMU)	Construction (CFMEU)
Scope:	National	Victoria	South Australia	South Australia
% sample size of membership over 45	17%	80%	65%	100%
Sample drawn (letters posted):	2,456	1,500	850	1,800
Returns to sender:	31	11	6	20
Adjusted sample:	2,425	1,489	844	1,780
Valid responses	1070	520	194	242
Response rate:	44.1%	34.9%	23.0%	13.6%

Note: The response rates are calculated as valid responses from the mail-out sample, adjusted for returns to sender.

Nationally, all three industry categories together comprise 21 percent of the total employed persons in the country (ABS 2003). Over 40 percent of employed persons in the in the health and community services industry sector, which includes aged care sector workers, are aged 45 and over (older workers as defined in this study). Other information suggests that a higher proportion of aged care sector workers are older than in the whole health and community services industry sector. With regard to gender, females comprised over 78 percent in the health and community Services industry (ABS 2003). The age and gender distribution of the respondents in the South Australian aged care sample are comparable with the ABS data.

Post-ready envelopes with the survey questionnaire and reply paid envelopes were prepared by Document Services of the University of South Australia for each of the four samples. “Sticky labels” with the names and addresses of members over 45 years of age were provided by the four unions from which the sample was drawn and labels attached to post-ready envelopes and posted through the University of South Australia mail service. The responses were returned to the School of International Studies at the University of South Australia which did not have a copy of the names and addresses of the people included in the sample. A second mail-out was undertaken in relation to finance sector, the only national sample of union members. This will permit efficient survey administration while safeguarding the confidentiality of individual survey respondents, which is the most important research ethics consideration in surveys.

The third stage, data analysis, consisted of data entry on to Excel spreadsheets of the responses numbered and identified by the union sample in the top left corner of the cover sheet, and subsequent data analysis directed by the researchers of the SA aged care sample, using the SPSS package. Data entry was performed by the Adelaide Business Bureau with full verification of each survey response (two passes and checking of discrepancies).

The fourth stage, preparation of draft reports, consisted of preparation by the researchers of four union draft reports based on the four union survey samples, and focus group reviews, consisting of discussion by the researchers of the survey data and the interpretations placed upon it with three South Australian focus groups, each consisting of a small selective sample of older workers from the participating industry partners, to validate or correct the interpretations placed upon the data by the researchers and to discuss the implications of the survey for the issues addressed in the project.

The fifth stage, completion of final reports, including a comprehensive project report combining four union-specific reports and the overall findings and implications of the research lodged with the National Centre for Vocational Education Research, with the union-specific reports for each of the four participating industry partners becoming supporting documents available separately on the internet.



# SA aged care workers survey

---

## Quantitative survey responses

**Table 1: Gender of respondents**

<b>Gender categories</b>	<i>responses</i>	<i>%</i>
Female	181	93.3
Male	13	6.7
Total	194	100.0

Notes: Non response rate was nil.

Table 1 indicates the gender mix of the SA aged care sample was a huge majority of females.

**Table 2: Age range of respondents**

<b>Age ranges</b>	<i>responses</i>	<i>%</i>
45-49	33	17.1
50-54	80	41.5
55-59	57	29.5
60-64	20	10.4
65 and over	3	1.6
Total	193	100.0

Notes: Non response rate was 1 or 0.5%

Table 2 indicates the age mix of the respondents in the SA aged care sample.

**Table 3: Respondent's expectations of dependants beyond respondent's retirement age**

<b>Respondent's dependants</b>	<i>responses</i>	<i>%</i>
Will have several dependants	1	.5
Will have one dependant	19	10.0
May have one or more dependants	10	5.3
Will have no dependants	130	68.4
Don't know	30	15.8
Total	190	100.0

Notes: Non response rate was 4 or 2.1%.

As Table 3 indicates, of the respondents in the SA aged care sample, about a two-thirds majority did not expect to have dependants beyond retirement age. These low dependency rates might have been expected to lead to a reduced motivation for most respondents to work beyond retirement, but Tables 5 and 13 indicate that this is not the case.

**Table 4: Respondent's expectations of retirement accommodation**

<b>Respondent's accommodation</b>	<i>responses</i>	<i>%</i>
Own home paid off	110	57.0
Own home mortgaged	44	22.8
Renting home	21	10.9
Other	5	2.6
Don't know	13	6.7
<b>Total</b>	<b>193</b>	<b>100.0</b>

Notes: Non response rate was 1 or 0.5%.

As Table 4 indicates, more than half of the respondents in the SA aged care sample have or expect to have their home paid off by the time of their retirement, and about a fifth of each sample will be in mortgaged homes. Like the low dependency rates, high home ownership might have been expected to lead to a reduced motivation for most respondents to work beyond retirement, but Tables 5 and 13 indicate that this is not the case.

**Table 5: Respondent's expectations of retirement income**

<b>Respondent's income</b>	<i>responses</i>	<i>%</i>
Will need a retirement job	37	19.6
May need to work part-time	66	34.9
May work for better lifestyle	31	16.4
Will not need to work	16	8.5
Don't know	39	20.6
<b>Total</b>	<b>189</b>	<b>100.0</b>

Notes: Non response rate was 5 or 2.6%

As Table 5 indicates, of the respondents in the SA aged care sample, less than one in ten believe or expect that they will not need to work beyond their retirement age. Most of the respondents in believe that they will need to work. This suggests that policy does not need to focus on persuading or inducing older workers to continue working.

**Table 6: Respondent's awareness of incentives or disincentives to work beyond retirement age**

<b>Respondent's awareness</b>	<i>responses</i>	<i>%</i>
Yes	16	8.3
No	54	28.1
Don't know	122	63.5
<b>Total</b>	<b>192</b>	<b>100.0</b>

Notes: Non response rate was 2 or 1.0%.

Tables 6 and 7 indicate that for most of the respondents in the SA aged care sample there is a need for much more education of people about the incentives or disincentives to work beyond retirement age.

**Table 7: Qualitative response rate on incentives or disincentives to work beyond retirement age**

<b>Incentives or disincentives</b>	<i>responses</i>	<i>%</i>
Qualitative response given	13	6.7
No qualitative response	181	93.3
<b>Total</b>	<b>194</b>	<b>100.0</b>

Notes: The high non-response rate to this open-ended question was consistent with the low positive response to the previous question.

Qualitative responses by South Australian aged care worker respondents to question 7 on incentives to work beyond retirement age emphasised advocacy of reducing withdrawal tax on superannuation. Qualitative responses by South Australian aged care worker respondents to question 7 on disincentives to work beyond retirement age included not being able to ‘salary sacrifice’ and employers not paying 9 % superannuation.

**Table 8: Respondent’s plans for activities other than work beyond retirement age**

<b>Respondent’s plans</b>	<i>responses</i>	<i>%</i>
Caring for grandchildren	70	36.1
Home improvements	50	25.8
Travel	116	59.8
Other	43	22.2
No plans	42	21.6
<b>Total</b>	<b>321</b>	<b>NA</b>

Notes: This question permitted respondents to tick more than one option.

Table 8 indicates that for most of the respondents in the SA aged care sample travel is a high priority for retirement activities. This suggests that workers will be seeking flexible working arrangements which will make travel possible, but also provides a motivation for older workers to continue working beyond their retirement age. Family and domestic activities also have substantial support, as literature on retirement indicates. About one in five have no retirement plans, which the literature indicates is usually a precursor to problems in adaptation.

**Table 9: Attitude of colleagues or work-mates towards older workers working beyond retirement age**

<b>Perceived attitude</b>	<i>responses</i>	<i>%</i>
Very negative	3	1.6
Negative	41	21.2
Don’t know	60	31.1
Positive	79	40.9
Strongly positive	10	5.2
<b>Total</b>	<b>193</b>	<b>100.0</b>

Notes: Non response rate was 1 or 0.5%.

Table 9 indicates that for about two in five of the respondents in the SA aged care sample there is ambivalence or uncertainty about the attitude of their colleagues to older workers continuing in work beyond retirement, although only about one in five of the aged care sample see their colleagues’ attitudes as negative or very negative.

**Table 10: Employer's attitude towards older workers working beyond retirement age**

<b>Perceived attitude</b>	<i>responses</i>	<b>%</b>
Very negative	3	1.5
Negative	24	12.4
Don't know	88	45.4
Positive	72	37.1
Strongly positive	7	3.6
<b>Total</b>	<b>194</b>	<b>100.0</b>

Like Table 9, Table 10 indicates that for more than two in five of the respondents in the SA aged care sample there is ambivalence or uncertainty about the attitude of their employers to older workers continuing in work beyond retirement, although about one in five see their employer's attitude as negative or very negative.

**Table 11: Employer attitude to supporting training for older workers beyond retirement age**

<b>Perceived attitude</b>	<i>responses</i>	<b>%</b>
Very negative	3	1.6
Negative	22	11.4
Don't know	104	53.9
Positive	55	28.5
Strongly positive	9	4.7
<b>Total</b>	<b>193</b>	<b>100.0</b>

Notes: Non response rate was 1 or 0.5%

Like Table 10, Table 11 indicates that for more than half of the respondents in the SA aged care sample there is ambivalence or uncertainty about the attitude of their employers to older workers continuing in work beyond retirement, although about one in five or less of the four samples see their employer's attitude as negative or very negative.

**Table 12: Respondent's attitude towards older workers working beyond retirement age**

<b>Own attitude</b>	<i>responses</i>	<b>%</b>
Very negative	4	2.1
Negative	6	3.1
Don't know	22	11.3
Positive	97	50.0
Strongly positive	65	33.5
<b>Total</b>	<b>194</b>	<b>100.0</b>

Consistent with the post-retirement work expectations reported in Tables 5 and 13, Table 12 indicates that very large majorities of the respondents in the SA aged care sample are personally positive or very positive about older workers continuing in work beyond retirement, with less than one in twenty being negative or very negative.

**Table 13: Respondent's preferences if working beyond retirement age**

<b>Respondent's</b>	<i>responses</i>	<b>%</b>
like different work	35	18.1
like similar work	58	30.1
like to keep my job	65	33.7
will not be working	18	9.3
Don't know	17	8.8
<b>Total</b>	<b>193</b>	<b>100.0</b>

Notes: Non response rate was 1 or 0.5%.

Table 13 indicates that between half and two thirds of the respondents in the SA aged care sample would like to continue in their present job or similar work beyond retirement age, and about one in five would prefer different work. Less than one in ten of the aged care sample will not be continuing in work beyond retirement.

**Table 14 A: Qualitative response rate on respondent's current work**

<b>Current work</b>	<i>responses</i>	<b>%</b>
Qualitative response given	53	27.3
No qualitative response	141	72.7
<b>Total</b>	<b>194</b>	<b>100.0</b>

Notes: The high non-response rate to this open-ended question was consistent with the question being conditional upon responses to question 13.

Tables 14A and 14B provide rates of open-ended qualitative response to questions asking respondents who replied in question 13 that they would like different work after they retire to indicate what their present job is and what kind of post-retirement work they would prefer.

**Table 14 B: Qualitative response rate on respondent's preferred work beyond retirement**

<b>Preferred work</b>	<i>responses</i>	<b>%</b>
Qualitative response given	50	25.8
No qualitative response	144	74.2
<b>Total</b>	<b>194</b>	<b>100.0</b>

Notes: The high non-response rate to this open-ended question was consistent with the question being conditional upon responses to question 13.

Qualitative responses by South Australian aged care worker respondents to question 14 on each respondent's current work and preferred work beyond retirement included (as in the construction industry study) frequent references to the physical demands of aged care work. Alternative work included becoming a personal care assistant or an Enrolled Nurse or a Registered Nurse (while another complained about how hard aged care nursing is); a supervisor; a shop assistant; a sales assistant; work in an animal shelter or garden centre; a call centre ("to sit down"); a cleaner; office work or clerk or receptionist; the hospitality industry; grief counsellor; occupational health and safety officer; cook or kitchen hand; lifestyle therapist; massage therapist; diversional therapist; teaching diversional therapy; disabilities worker; horticulture worker; teaching English overseas; or writer.

Several wanted to establish a small business, including a craft-work shop or garden centre. One intended to become an unpaid volunteer in a nursing home, to continue the work in a less physically taxing role.

**Table 15: Respondent need training to work beyond retirement age**

<b>Respondent's</b>	<i>responses</i>	<i>%</i>
Yes	49	29.9
No	93	56.7
Don't know	22	13.4
<b>Total</b>	<b>164</b>	<b>100.0</b>

Notes: Non response rate was 30 or 15.5%.

In Table 15 more than half of the respondents in the SA aged care sample indicate that they do not, and less than one in three do, require training to continue working beyond retirement age.

**Table 16: Qualitative response rate on training needs (of those who answered yes to question 15).**

<b>Effective training</b>	<i>responses</i>	<i>%</i>
Qualitative response given	48	24.7
No qualitative response	146	75.3
<b>Total</b>	<b>194</b>	<b>100.0</b>

Notes: The high non-response rate to this open-ended question was consistent with the question being conditional upon responses to question 15.

Table 16 provide rates of open-ended qualitative response to questions asking respondents who replied 'yes' in question 15 that they would need training to obtain different work after they retire to indicate what kind of training they would require. Qualitative responses by this sub-group of South Australian aged care worker respondents to question 16 included training in customer relations (to become a sales assistant); running one's own business; computer skills for office work; animal care (to work in an animal shelter); grief counselling; occupational health and safety; for a diversional therapist certificate; in palliative care; to become a lifestyle therapist; a 'train the trainer' course; an Enrolled Nurse diploma; and a postgraduate specialty in nursing.

Several respondents wanted more regular up-date training in aged care work, while others mentioned that they had regular in-house training in their current jobs.

**Table 17: Availability to the respondent of the types of training required to work beyond retirement**

<b>Respondent's</b>	<i>responses</i>	<i>%</i>
Yes	26	50.0
No	9	17.3
Don't know	17	32.7
<b>Total</b>	<b>52</b>	<b>100.0</b>

Notes: Non response rate was 142 or 73.2%. The high non-response rate to this question was consistent with the question being conditional upon responses to question 15.

Conditional upon responses to questions 15 and 16, Table 17 indicates that more than half of respondents who indicated that they would need training to obtain different work after they retire reported that the kind of training they would require was available to them, and less than one in five reported that the training they would need was not available to them.

**Table 18: Training to increase respondent's productivity in work beyond retirement age**

<b>Respondent's</b>	<i>responses</i>	<i>%</i>
Yes	50	54.9
No	12	13.2
Don't know	29	31.9
<b>Total</b>	<b>91</b>	<b>100.0</b>

Notes: Non response rate was 103 or 53.1%. The high non-response rate to this question was consistent with respondents being invited to move from question 15 to question 20.

Table 18 indicates that more than half of respondents indicated that they would see value in training to enhance the productivity and effectiveness of older workers who continue to work beyond retirement age, and only about one in ten did not.

**Table 19: Availability to the respondent of productivity-enhancing training**

<b>Respondent's</b>	<i>responses</i>	<i>%</i>
Yes	42	49.4
No	13	15.3
Don't know	30	35.3
<b>Total</b>	<b>85</b>	<b>100.0</b>

Notes: Non response rate was 109 or 56.2%. The high non-response rate to this question was consistent with the question being conditional upon responses to question 18.

Conditional upon responses to question 18, Table 19 indicates that about half of respondents who indicated that they saw value in training to enhance the productivity and effectiveness of older workers who continue to work beyond retirement age reported that the kind of training they would require was available to them, and less than one in five reported that the training was not available to them.

**Table 20: Would 'Train the trainer' courses assist older workers to train younger workers**

<b>Respondent's</b>	<i>responses</i>	<i>%</i>
Very unlikely	6	3.1
Unlikely	8	4.1
Don't know	21	10.8
Likely	99	51.0
Very likely	60	30.9
<b>Total</b>	<b>194</b>	<b>100.0</b>

Notes: Non response rate was nil.

Table 20 indicates that around four in five of the respondents in the SA aged care sample saw value in 'train the trainer' courses that would assist older workers to train or mentor younger workers and pass on to them the benefits of their experience.

**Table 20A: Q12 Own Attitude & Q20 Trainer Cross-tabulation**

			Q20 Trainer					Total
			very unlikely	unlikely	neutral	likely	very likely	
<b>Q12 Own Attitude</b>	strongly disagree	<i>Count</i>	0	0	1	2	1	4
		<i>% of Total</i>	.0%	.0%	.5%	1.0%	.5%	2.1%
	disagree	<i>Count</i>	1	2	0	3	0	6
		<i>% of Total</i>	.5%	1.0%	.0%	1.5%	.0%	3.1%
	neutral	<i>Count</i>	1	1	3	9	8	22
		<i>% of Total</i>	.5%	.5%	1.5%	4.6%	4.1%	11.3%
	agree	<i>Count</i>	1	1	12	59	24	97
		<i>% of Total</i>	.5%	.5%	6.2%	30.4%	12.4%	50.0%
	strongly agree	<i>Count</i>	3	4	5	26	27	65
		<i>% of Total</i>	1.5%	2.1%	2.6%	13.4%	13.9%	33.5%
<b>Total</b>	<i>Count</i>	6	8	21	99	60	194	
	<i>% of Total</i>	3.1%	4.1%	10.8%	51.0%	30.9%	100.0%	

Notes: There were nil non-responses. The Pearson Chi-Square has a value of 33.008, and is significant at 0.007. In the cross-tabulation, 17 cells (68.0%) have expected count less than 5. The minimum expected count is 0.12.

Table 20A reports a significant cross-tabulation that indicates that in the SA aged care sample the proportion of respondents who are personally positive or very positive about older workers continuing in work beyond the “normal” retirement age were inclined to agree that “train the trainer” training would assist older workers to train or mentor younger workers and pass on to them the benefits of their experience.

**Table 21: Gender differences in access to training and employment opportunities for older workers**

Respondent's perception	responses	%
strongly disagree	3	1.6
disagree	34	17.6
neutral	60	31.1
agree	74	38.3
strongly agree	22	11.4
Total	193	100.0

Notes: Non response rate was 1 or 0.5%.

Table 21 indicates that around two in five of the respondents in the SA aged care sample perceived gender differences in access to training and employment opportunities for older workers, and about one in five did not.



**Table 22: Need for training of supervisors and younger workers against age-biased stereotypes**

<b>Respondent's perception</b>	<i>responses</i>	<i>%</i>
strongly disagree	2	1.0
disagree	20	10.4
neutral	39	20.3
agree	102	53.1
strongly agree	29	15.1
<b>Total</b>	<b>192</b>	<b>100.0</b>

Notes: Non response rate was 2 or 1%.

Table 22 indicates that around seven in ten of the respondents in the SA aged care sample saw a need for training of supervisors and younger workers against age-biased stereotypes, and about one in ten did not. However, this is less persuasive than it would have been if the personal experience indicated by respondents in Tables 9, 10 and 11 were more clearly consistent with this view. The ambivalence or uncertainty evident in Tables 9, 10 and 11 somewhat diminishes the strength of the finding in Table 22, but it remains a notably strongly defined view on the specific issue.

## SA aged care – qualitative responses to question 23

**Table 23: Qualitative response rate on most effective training for work beyond retirement age**

<b>Effective training</b>	<i>responses</i>	<i>%</i>
Qualitative response given	139	71.6
No qualitative response	55	28.4
<b>Total</b>	<b>194</b>	<b>100.0</b>

Table 23 provide rates of open-ended qualitative response to questions asking respondents about their suggestions about the most effective training required for work beyond retirement age. Their qualitative responses are reported in the next section.

Q. 23 Based on your experience, what types of training programs would be most effective to equip older workers to acquire skills and knowledge to remain effective in the workforce beyond retirement age in your present line of work? Please specify:

- Computer skills (24)
- Skills Update (18)
- Manual handling (13)
- On-going training in new methods, equipment, documentation (10)
- OHS training (4)
- Train the trainer course (2)
- Using older workers for work experience (2)
- Same training as younger workers (2)
- Patience/assertiveness (2)

- Physical and health fitness (2)
- Information and access to training (2)
- Training in all areas
- Time management
- To transfer to less physical job
- Case management human services
- Management skills

## SA aged care – qualitative responses to question 24

**Table 24: Qualitative response rate on policy changes required for work beyond retirement age**

<b>Policy changes</b>	<i>responses</i>	<i>%</i>
Qualitative response given	98	50.5
No qualitative response	96	49.5
<b>Total</b>	<b>194</b>	<b>100.0</b>

Table 24 provide rates of open-ended qualitative response to questions asking respondents about their suggestions on policy changes required for work beyond retirement age. Their qualitative responses are reported in the next section.

### Q. 24 Are there policy changes that are needed to reinforce the effectiveness of training

- End age discrimination and negative attitudes towards older workers from supervisors and younger workers (20)
- Job flexibility (P/T, casual, job share) (5)
- Less fees for training to encourage women
- People friendly workplace
- Cheaper TAFE courses
- Workcare regulations for over 65
- No working beyond retirement age

# Discussion of the issues

---

## Q 23. *Training programs considered most effective*

A number of areas were stated as essential to equip older workers in the Aged Care industry in the Liquor Hospitality and Miscellaneous Sector Union with skills and knowledge to remain effective in the workforce beyond retirement age. This sector includes a variety of health care professionals such as nurses, aged care workers, ward clerks, kitchen, cleaning and administrative staff in aged care facilities. The most salient points are discussed here, incorporating some statements from the responses of the questionnaire and from focus group discussion with LHMU members.

### 1. Computer skills

Training in computer skills rated high among the respondents of the Aged Care Union in the LHMU Sector. Computer skills in simple word-processing techniques were considered essential for report writing, filing reports, invoice preparations and day-to-day administration not only among those working in the administrative area but even among the general; aged care workers..

### 2. Skills update

Training in this area was ranked next from the responses to the question. This is an indication of the serious commitment aged care workers put into their occupation and their desire to ensure that their skills are updated constantly.

### 3. Training

A varied number of areas were stated and these include training relating specifically to the work involved such as manual handling, OHS training and refresher courses that keep them abreast of current trends in the industry. Fitness training was also considered a crucial training area for those working with aged care whether in the personal care of the aged, cleaners, cooks

The methods suggested include hands-on-training, on-the-job training, and one-on-one training, indicating a preference for training that is practical rather than theoretical in orientation, and as one response stated “hands-on experience – the best teacher”. There was also a preference for “train the trainer” course as this enabled the workers to share their knowledge, skills and experience of working in the field. This response relates to another suggestion for a training course to train employers who would then understand the importance of valuing older workers as role models for younger and less experienced workers.

Other training suggestions relate more to personal development that would enhance their effectiveness in the workforce beyond retirement age, and include: assertiveness training, physical and health fitness, time management, management skills, case management, human services.

Overall the responses indicate that aged care workers are aware of the need to keep up-to-date in their occupational area and that what is needed from senior management and employers is information and equality of access to training.

*Q 24 Policy Changes to reinforce effectiveness of training.*

1. Policy to end age discrimination

As the various statements in relation to this issue indicate, age discrimination is a major barrier in the training and retention of older workers in the workforce. Negative perceptions regarding older workers come from supervisors and younger workers, and similar to the responses from the aged care workers in the Health Sector Union, workers from the LHMU also want to see policy implementation to end age discrimination.

Focus group discussion with LHMU members further indicates the seriousness of this issue and that bullying is a commonplace occurrence.

2. Training

Among the policy in regard to training, the suggestions include provision from the government to employers in the form of financial incentives and enable workers access to free or subsidized training.

3. Working hours

Consistent with concerns for fitness training, responses in regard to working hours range from flexibility of working hours to part-time work to job share. There were also suggestions that there be opportunities for deployment into less strenuous work.

The responses indicating that not all older workers wish to stay on beyond retirement age relate more to the concern with individual health and fitness in order to work effectively in this occupation.

The nature of the work brought out suggestions that workers should not be forced to work beyond retirement age, and that this be up to the individual depending on health and circumstances.

Overall, responses to this question indicate a strong demand for policy changes that would lead to an end in age discrimination. The problem is not with government providing incentives for older workers to continue working after retirement age; what is needed is attitudinal change from employers, senior management, and younger workers who tend to see older workers as liability in the workplace. Older workers are willing to continue working particularly if workcover regulations as well as superannuation rules make it possible for older workers beyond age 65 are not penalized through taxes for working.

# Conclusions

---

The policy priority is to address the obstacles, constraints and disincentives that deter, constrain or prevent older workers from working beyond their “normal” retirement age. A substantial majority of older workers believe that older workers face discrimination in the workforce, but less of them report discriminatory attitudes from their colleagues and employers. Quantitative and qualitative findings strongly supported measures against age discrimination and age-biased stereotypes that limit opportunities for older workers. Rules and regulations relating to superannuation, work-cover policies need to be revised as current policies discriminate against older workers and act as disincentives for older workers to continue working. Since most older workers expect to continue working but a small minority do not, reviews of retirement ages need to enable individuals to have the options to continue working or to retire, depending on each individual’s health and circumstances. Older workers see themselves as needing fairer access to training programs to enable them to update their skills, and to keep up with developments in technology, especially in training in computing skills updating of existing skills, and professional development training programs that would enhance specific skills in their particular fields. The respondents strongly favour such programs, including “train the trainer” courses to equip older workers to train or mentor younger workers.

# References

---

ABS (Australian Bureau of Statistics) 2003 Year Book Australia 2003: Income and Welfare: An ageing Australia.

Babbie, E., 1990, Survey Research Methods, Wadsworth, Belmont, Cal.

SA AGED CARE LHMU

## Older workers' perspectives on training and retention of older workers.

### NATIONAL SURVEY QUESTIONNAIRE

#### Your response matters. Why?

As you know, older people make up an increasing share of Australia's population. Some say this will mean older workers will need to continue working longer. The views of older workers have been missing from the public discussion of these issues. Four unions are cooperating with this project in an effort to inform public and policy debates by adding workers' viewpoints.

This is a survey of older workers in the **Aged Care, Construction and Finance** industries, who are members of four unions: the Construction Forestry Mining and Energy Union (CFMEU); Finance Sector Union; the Health Services Union; and the Liquor Hospitality and Miscellaneous Union. These four unions urge their members to complete the survey.

The survey project is funded by the National Centre for Vocational Education Research (NCVER). The researchers are from the University of South Australia.

**Your privacy and the confidentiality of your individual survey response are safe.** The survey questionnaires are being posted to Union members by the Unions, to a sample of union members. Your **privacy** is protected because the researchers at the University of South Australia do not know your name or your address. All survey responses are to be returned to the researchers at the University of South Australia. The **confidentiality** of your individual survey response is protected because the Unions who have the names and addresses do not see any individual survey responses. The researchers at the University of South Australia will receive all of the survey responses and analyse them. The researchers will prepare summary reports for the Unions and NCVER.

**Please take a few minutes to answer the questions in this questionnaire and post the form back to the researchers at the University of South Australia in the enclosed stamped addressed envelope.**

**Please tick one box for each question, unless another response is requested.**

**About you and your situation:**

**1. Are you male or female?**

**1. Female**

**2. Male**

**2. What age range includes your age?**

**1. 45-49**

**2. 50-54**

**3. 55-59**

**4. 60-64**

**5. 65 & over**

**3. Will you have dependants relying on you beyond your retirement age?**

**1. Will have several dependants**

**2. Will have one dependant**

**3. May have one or more dependants**

**4. Will have no dependants**

**5. Don't know**

**4. When you retire, where will you be living?**

**1. Own home paid off**

**2. Own home mortgaged**

**3. Renting home**

**4. Other**

**5. Don't know**

**5. Do you expect to have enough income and savings to live on when you retire, without needing to work?**

**1. Will need a retirement job**

**2. May need to work part-time**

**3. May work for better lifestyle**

**4. Will not need to work**

**5. Don't know**

**6. Are there financial incentives or disincentives in your superannuation scheme that may influence whether people in your industry work beyond retirement age?**

**1. Yes**

**2. No**

**3. Don't know**



7. (If you answered 'No' to question 6, please go to question 8.) If you answered 'Yes' to question 6, please say what the financial incentives or disincentives are:

### Your perspective on working after retirement age:

8. Do you have plans for what you will do in your retirement, not including paid work? (Tick as many boxes as apply in question 8).

- |                             |                          |                          |                          |                          |
|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. Caring for grandchildren | 2. Home improvements     | 3. Travel                | 4. Other                 | 5. No plans              |
| <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

9. Do most of your colleagues or work-mates have a positive or negative attitude towards older workers continuing at work beyond retirement age?

- |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. Very negative         | 2. Negative              | 3. Don't know            | 4. Positive              | 5. Strongly positive     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

10. Does your employer have a positive or negative attitude towards older workers continuing at work beyond retirement age?

- |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. Very negative         | 2. Negative              | 3. Don't know            | 4. Positive              | 5. Strongly positive     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

11. Does your employer have a positive or negative attitude to supporting training for older workers if they continue at work beyond retirement age?

- |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. Very negative         | 2. Negative              | 3. Don't know            | 4. Positive              | 5. Strongly positive     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Your perspective on training for work after retirement:

12. Do you agree or disagree that older workers can continue to participate effectively in the workforce beyond retirement age?

1. Strongly disagree

2. Disagree

3. Neutral

4. Agree

5. Strongly agree

13. If you continue working beyond retirement age, would you like to keep your present job, or to do similar work or a different type of work?

1. I would like different work

Go to question 14

2. I would like similar work

Go to question 15

3. I would like to keep my job

4. I will not be working

Go to question 20

5. Don't know

14. If you will or might continue working beyond retirement age in a different type of job, what type of work would you prefer?

My job now is:

I would like to work as a:

--	--

15. If you would or might continue working beyond retirement age in the type of job you prefer, would you need training to do it?

1. Yes

Go to question 16

2. No

Go to question 20

3. Don't know

Go to question 20

16. If you answered yes to question 15, what kind of training would you need? Please specify:

--

**17. Is the type of training you described at question 16 available to you?**

**1. Yes**

**2. No**

**3. Don't know**

**18. Whether you would prefer the work to be similar or different, are there training programs that would increase your productivity and effectiveness if you continue working beyond retirement age?**

**1. Yes**

**2. No**

**3. Don't know**

**19. Is the type of training referred to at question 18 available to you?**

**1. Yes**

**2. No**

**3. Don't know**

**Please answer questions 20-24 whether you wish to do  
continue in work or not.**

**20. Would a 'Train the trainer' course be likely to improve the capacity of older workers to train younger workers and give them the benefit of their experience?**

**1. Very  
Unlikely**

**2. Unlikely**

**3. Neutral**

**4. Likely**

**5. Very Likely**

**21. Do you agree or disagree that there are differences in access to training opportunities and employment participation for male and female older workers?**

**1. Strongly  
disagree**

**2. Disagree**

**3. Neutral**

**4. Agree**

**5. Strongly  
agree**

**22. Do you agree or disagree that there is a need for training of supervisors and younger workers against age-biased stereotypes of older workers?**

**1. Strongly  
disagree**

**2. Disagree**

**3. Neutral**

**4. Agree**

**5. Strongly  
agree**

**23. Based on your experience, what types of training programs would be most effective to equip older workers to acquire skills and knowledge to remain effective in the workforce beyond retirement age in your present line of work? Please specify:**

**24. Are there policy changes that are needed to reinforce the effectiveness of training in fostering retention of older workers as workforce participants? Please specify:**

**Thank you for your cooperation. Please return this form in the stamped addressed envelope provided.**