INTERNATIONAL STANDARD

ISO 25550

First edition
2022-02

Ageing societies — General requirements and guidelines for an age-inclusive workforce

Reference number
ISO 25550:2022(E)

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Contents

Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 314, *Ageing societies*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

0.1 An ageing workforce

Everyone ages. Age is a continuum. The younger worker of today will become the older worker of tomorrow. Workers expect to live longer. Creating ways for people to have meaningful, productive multi-stage and multidimensional careers is a major opportunity to engage workers across generations for individuals, organizations and communities.

Proactive organizations are tapping into older workers by extending their career models, creating new development paths, and inventing roles to accommodate these workers. This can encourage active participation of older workers and increase the organization's reputation and image in society. This also creates a more balanced workplace, where experience is shared and intergenerational harmony is promoted. Applying these requirements and guidelines can help build a strong multi-generational workforce and minimize the risk of age discrimination. Organizations with an age-inclusive workforce can become more productive and have a competitive advantage if these guidelines are followed.

The benefits of older workers to the organization can include but are not limited to:

— reductions in absenteeism, burnout, turnover, recruitment costs and workplace injuries;

— improvements in innovations, accessibility, staff engagement, motivation, retention and productivity;

— the synergy gained by linking new and existing skills of the workforce that can raise the organization's productivity and capacity for innovation;

— cost effectiveness when the organization invests in skills and health for an age-inclusive workforce;

— solving labour workforce shortages;

— improving the corporate image of the organization.

0.2 Applying this document

The Later Life Workplace Index (LLWI)[24] was used as the initial starting point for this document. The LLWI consists of nine dimensions covering age-inclusive organizational culture and leadership, as well as more specific age-inclusive practices regarding work design, health management, individual development, knowledge management, transition to retirement, continued employment options, and health and retirement coverage. This document provides general requirements and guidelines to support the business case for an age-inclusive workforce and contributes to the UN Sustainable Development Goals (SDGs)- Agenda 2030, including, but not limited to #3-'Good health and wellbeing', #4-'Quality education', #5-'Gender equality', #8-'Decent work and economic growth', #9-'Industry, innovation and infrastructure', and #10-'Reduced inequalities'.

The COVID-19 pandemic has highlighted several emerging issues impacting older workers. These are described in ISO/PAS 45005.

An age-inclusive workforce is interdisciplinary in nature, complex and it depends on many stakeholders and systems. As such, there are documents linked to older workers, e.g. ISO 30415: and ISO/TR 30406.

This document can be used in connection with an organization's management systems, human resource programs, occupational health and safety programs, diversity and inclusion programs, Corporate Social Responsibility or on its own in the absence of a formal workplace program to support an age-inclusive workforce. Annex F provides the user with an overview of some key topics and their relevance.

0.3   A roadmap

Figure 1 explains how this document is structured.

The general perspective is described here.
0.1 An ageing workforce
This part also describes how to read and apply this document
0.2 Applying this document
This part shows how the document is structured
0.3 A roadmap

This defines what is included in this document.
1 Scope

This is the formal part.
2 Normative references

These clauses focus on the overarching guiding values and approaches.
4 Guiding principles
5 Leadership and age-inclusive organizational culture

This displays the terms and definitions that apply in this document.
3 Terms and definitions

This clause focuses on age-inclusive workforce.
6 Workforce planning, recruitment/ re-entry and work allocation

These clauses focus on how to design work and good health and wellbeing.
7 Work design
8 Health and wellbeing

These clauses focus on conditions for career and knowledge development, digital technology and innovation.
9 Career development
10 Knowledge management and intergenerational collaboration
11 Digitalization of workplaces and innovation

These clauses focus on conditions for gradually phasing out from the workforce and the opportunities to continue working after retirement.
12 Succession planning
13 Transition to retirement
14 Continuing in the workforce

This clause focuses on how older workers can contribute to the organisation and wider community including the informal workforce.
15 The value of the ageing workforce's ecosystem to the organization

This clause focuses on economic aspects.
16 Financial literacy planning and benefits and rewards

This clause and annexes focus on how to measure success and improvements over time.
17 Continual improvement - assessment tools
Annex C (informative) Assessment tools for an age-inclusive workforce
Annex D (informative) Examples of metrics to measure success and outcomes.

These annexes provide additional information.
Annex A (informative) Concepts and effects of ageing
Annex B (informative) Individual continual career development planning
Annex E (informative) Recommendations and solutions for small and medium-sized organizations
Annex F (normative) Summary of the requirements

Figure 1 — Roadmap to implementing guidelines and requirements for an age-inclusive workforce

Ageing societies — General requirements and guidelines for an age-inclusive workforce

1 Scope

This document provides requirements and guidelines to achieve an age-inclusive workforce, which has the potential of adding value for organizations, workers, communities and other stakeholders. This document enables organizations and other stakeholders to develop, implement, maintain and support an age-inclusive workforce. It provides opportunities for older workers, working internal or external to the organization, to be productive.

This document is applicable to all organizations regardless of type or size, and to all work arrangements and all forms of relationships between organizations and workers.

While organizations need to be inclusive of all workers regardless of age, these requirements and guidelines focus specifically on older workers.

NOTE   It does not imply that younger workers are excluded. Organizations can tailor these requirements and guidelines according to their own role and specific context.

2 Normative references

There are no normative references in this document.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at https://www.electropedia.org/

3.1
ageing society
demographics of an older population that shifts overtime

3.2
accessibility
extent to which products, systems, services, environments and facilities can be used by people from a population with the widest range of user needs, characteristics and capabilities to achieve identified goals in identified contexts of use

[SOURCE: ISO 9241-112:2017, 3.15, modified — Note to entry has been deleted.]

3.3
worker
person performing work or work-related activities that are under the control of the organization

Note 1 to entry: Persons perform work or work-related activities under various arrangements, paid or unpaid, such as regularly or temporarily, intermittently or seasonally, casually or on a part-time basis.

Note 2 to entry: Workers include top management, managerial, and non-managerial persons.

Note 3 to entry: The work or work-related activities performed under the control of the organization can be performed by workers employed by the organization, workers of external providers, contractors, individuals, agency workers, and by other people to the extent the organization shares control over their work or work-related activities, according to the context of the organization.

[SOURCE: ISO 45001:2018, 3.3]

3.4
workforce
people who provide a service or labour to contribute to business or organizational outcomes

[SOURCE: ISO 30400:2016, 10.1]

3.5
ageing workforce
changes in the number of older people in the *workforce* (3.4)

Note 1 to entry: the specific age of being older will vary by country, industry, and other factors.

3.6
workplace
area(s) in which the *workers'* (3.3) activities are carried out

[SOURCE: ISO/TR 25901-1:2016, 2.1.8.35]

3.7
organizational culture
values, beliefs and practices that influence the conduct and behaviour of people and organizations

[SOURCE: ISO 30400:2016, 3.2]

3.8
human capital
value of the collective knowledge, skills and abilities of an organization's *workers* (3.3)

[SOURCE: ISO 30400:2016, 4.1, modified — "people" has been replaced with "workers".]

3.9
stakeholder
person or organization that can affect, be affected by, or perceive itself to be affected by a decision or activity

EXAMPLE   Customers, owners, people in an organization, suppliers, bankers, unions, work councils, partners, or society that can include competitive or pressure groups.

[SOURCE: ISO 30400:2016, 5.1]

3.10
diversity
characteristics of differences and similarities between people

Note 1 to entry: Diversity includes factors that influence the identities and perspectives that people bring when interacting at work.

Note 2 to entry: Diversity can foster learning from others who are not the same, about dignity, respect and inclusiveness for everyone, and about creating *workplace* (3.6) environments and practices that foster learning from others to gain advantages of diverse perspectives.

[SOURCE: ISO 30400:2016, 9.1]

3.11
inclusion
process of including all *stakeholders* (3.9) in organizational contexts

Note 1 to entry: Organizational policies, processes and practices that are fair and impartially applied can support an age-inclusive *workplace* (3.6).

Note 2 to entry: This involves the entire *workforce* (3.4) having access to opportunities and resources to enable their contribution to the organization.

Note 3 to entry: This involves *stakeholders* (3.9) from different groups being accepted, welcomed, enabled to have a voice, and to develop a sense of belonging.

[SOURCE: ISO 30400:2016, 9.5, modified — "practice" replaced with "process", Notes to entry deleted, new Notes to entry added.]

3.12
financial literacy
ability to identify, retrieve, evaluate and use financial information effectively

3.13
wellbeing
state of being comfortable, healthy and happy

[SOURCE: ISO 17679:2016, 3.3, modified — "feeling" replaced with "state", Note to entry deleted.]

3.14
succession planning
process for identifying and developing current *workers* (3.3) with the potential to fill key positions in the organization

[SOURCE: ISO 30400:2016, 4.11, modified — "employees" replaced with "workers".]

3.15
age-inclusive
including all *stakeholders* (3.9) in organizational contexts where people of diverse ages are treated fairly and equally and included in all aspects of the organization

3.16
age-inclusive workforce
workers (3.3) of diverse ages who all are treated fairly and equally and are included in organizational processes

3.17
ageism
stereotyping, prejudice, and discrimination against people on the basis of their age

Note 1 to entry: Ageism takes many forms, including prejudicial attitudes, discriminatory practices, or institutional policies and practices that perpetuate stereotypical beliefs.

[SOURCE: WHO, 2021[23]]

3.18
work allocation
allocation
process of analysing and assigning work to all *workers* (3.3), regardless of age

3.19
health literacy
ability to recognize, identify, retrieve, evaluate and use health information effectively

3.20
knowledge management
combination of processes, actions, methodologies and solutions that enable the creation, maintenance, distribution and access to organizational knowledge

Note 1 to entry: This is of particular importance with an *ageing workforce* (3.5) to allow transfer between different generations of *workers* (3.3). A knowledge management system includes the organization's knowledge management culture, structure, governance and leadership; roles and responsibilities; planning technology, processes and operation, etc.

[SOURCE: ISO 30400:2016, 14.1, modified — Note to entry added.]

4   Guiding principles

The organization provides an age-inclusive workforce that takes the following guiding principles into account at stages of planning, design, operation and evaluation and is aimed at all workers and stakeholders (see Table 1). The organization has the leadership and guiding principles, based on the underlying principles of social responsibility, to support and implement an age-inclusive workforce policy and develops an organizational culture to support this policy.

NOTE   The organization can consult ISO 26000, which provides guidance on the underlying principles of social responsibility, engaging stakeholders, and integrating socially responsible behaviour into the organization such as an age-inclusive workforce.

Table 1 — Guiding principles

Guiding Principle	Details
Decency of work	The organization supports and takes actions that demonstrate that their workplace provides employment and decent work for all workers. The organization values employees and creates a meaningful work environment.
Leadership and integrity	The organization's leadership demonstrates integrity by endorsing and ensuring strategies, operations and values regarding an age-inclusive workforce are implemented.
Inclusiveness	The organization includes all workers (throughout the worker's life-cycle) regardless of age, disability, gender, sexual orientation, religion, race, colour, ethnicity, socioeconomic status or any other status. This includes being a non-discriminatory organization that is open and trustworthy, values and recognizes workers and their perspectives, and provides opportunities to participate and contribute to the organization.
Health, wellbeing, and safety	The organization ensures that the health, wellbeing and safety expectations of all workers are addressed throughout the organization's operations.
Accessibility	The organization creates a workplace that is designed to be inclusive following universal design principles, i.e. useable by all people and enables everyone to actively contribute to the goals and objectives of the organization.
Responsiveness	The organization acts in a socially responsible way concerning its age-inclusive workforce policies, guidelines and culture. It initiates and responds to communications to and from workers at all levels in the organization, stakeholders, and other interested parties and takes appropriate action.
Confidentiality, privacy and security	Personal information and data, including age, are treated in a confidential manner and stored securely, while respecting the privacy of all workers and only disclosing information with the individual's consent.

5 Leadership and age-inclusive organizational culture

5.1 Age-inclusive governance and leadership

5.1.1 General

Age-inclusive governance includes ethics, risk management, compliance, accountability, and administration to achieve an age-inclusive workforce. It is a form of governance where the organization takes into account different aspects with the aim that every worker, no matter what age, can contribute to the organization's overall goals as well as achieving their personal goals.

Age-inclusive leadership involves promoting a sustainable working life by balancing the interests and needs of workers' age and the organization's needs. Leadership involves establishing and sharing a clear vision and strategy about being an age-inclusive workforce with all key stakeholders so that everyone can participate in achieving the vision. Leaders provide information, knowledge and methods to realize that vision, and coordinate and balance the interests of all managers, workers and other stakeholders.

Age-inclusive systems are shaped by the organization's age-inclusive strategies and objectives. The organization determines how the roles and responsibilities are assigned, controlled and coordinated to achieve and maintain being an age-inclusive organization. It also determines how information is shared between the different levels of management, workers and stakeholders.

The Human Resources Management (HRM) function can act as a catalyst to ensure that management understands the business case for an age-inclusive workforce.

5.1.2 Requirements

In order to demonstrate leadership, organizations shall:

a) make a clear statement about being an age-inclusive organization through using organizational documents, for instance, in its vision, mission, values, code of conduct and HRM strategy;

b) have an age-inclusive workforce strategy that recognizes and adapts to the changing trends of ageing workers;

c) adopt a total systems approach in being an age-inclusive organization.

   NOTE   A total systems approach ensures that age-inclusive principles, policies, procedures and processes are integrated into the organization in a systematic manner.

5.1.3 Recommendations:

Organizations should:

a) adapt and customize HRM policies and procedures with a worker life-cycle perspective including the capability, knowledge, needs and wishes of older workers;

b) work with stakeholders that focus on older people and encouraging those stakeholders in supporting an age-inclusive workforce;

   EXAMPLE   Thailand: An urban social enterprise is running an organic vegetable delivery business. They buy their supplies from older people growing organic vegetables in their own city gardens.

c) have key performance objectives to measure the effectiveness of their age-inclusive workforce;

d) appoint a member of top management to demonstrate and ensure the organization continually supports an age-inclusive workforce.

5.2   Age-inclusive organizational culture

5.2.1   General

Organizational culture includes a set of values, beliefs and practices that influence the conduct and behaviour of people and their organizations and it demonstrates a commitment to the guiding principles identified in Clause 4 and is supported by everyone in the organization.

An age-inclusive organization focuses on all workers regardless of age and gives particular recognition to the needs, circumstances and choices of older workers. Older workers are included in the process through communications (see 5.3), participation, meeting and consulting with all workers and workers' representatives while promoting equal opportunities (see 5.4), a positive image of all ages (see 5.5) and older worker recognition (see 5.6).

5.2.2   Requirements

In order to meet the commitment to the guiding principles in Clause 4, and to deal with the subject of diversity and inclusivity, the organization shall:

a)   develop an age-inclusive code of conduct that addresses the values, beliefs and practices that states how the organization expects its managers, supervisors and workers to behave and conduct themselves towards older workers;

b)   encourage a culture in which older workers feel valued and motivated, and are able to perform productively;

c)   ensure older workers are included in the promotion of inclusive approaches and culture.

5.2.3   Recommendations

The organization should:

a)   establish a combination of bottom-up and top-down approaches allowing workers to safely promote age-inclusive actions with everyone in the organization;

b)   communicate this age-inclusive code of conduct effectively to everyone in the organization;

c)   develop metrics and systems of accountability to continually review the level of compliance with the age-inclusive code of conduct and take appropriate measures for improvement;

d)   use worker resource groups consisting of older workers to adopt an age-inclusive organizational culture.

> NOTE   For further information on inclusive organizational cultures, refer to ISO 30415.

5.3   Workplace communication

5.3.1   General

Communications, both internally and externally, are key to establishing a common understanding about an age-inclusive workforce among workers, their representatives and management in the organization and external stakeholders.

5.3.2   Recommendations – internal communications

The organization should:

a)   distribute workers' achievements by publishing articles and images representing all ages within the organization, e.g. in internal magazines, websites and social networks with the worker's approval;

b) have open and transparent exchange among workers, worker representatives, and management (not only from management but also from workers) regarding all phases of the worker life-cycle, including retirement as well as continued opportunities for work;

c) establish, implement and maintain processes for consultation and participation of all workers in the development, planning, implementation, performance evaluation and actions for improvement of their age-inclusive workplace.

5.3.3 Recommendations – external communications

The organization should ensure that:

a) all external key stakeholders periodically receive communications about activities that the organization conducts in the area of being an age-inclusive workforce;

b) it has clear public statements that the organization is an age-inclusive workplace (e.g. through their website);

c) all phases of the ageing worker's life-cycle are taken into account in external communications.

5.4 Equal opportunities and preventing ageism

5.4.1 General

The organization does not tolerate age discrimination, also known as ageism. Each worker has equal rights and opportunities, e.g. working conditions, career advancement, training and professional development and in the restructuring of the organization.

5.4.2 Requirements

To demonstrate that the organization provides equal opportunities without discrimination, it shall:

a) have policies and procedures concerning an age-inclusive workforce covering all stages of the worker life-cycle;

b) ensure that ageism, bullying, harassment and abuse of all workers is not tolerated.

EXAMPLE   Norway: A small shoe shop in an area with a high proportion of older people places an advertisement that states "We are an age-inclusive workplace and employer".

5.4.3 Recommendations

The organization should:

a) have mechanisms in place to identify and address hidden ageism;

b) be responsive to the development of ageing workers' untapped potential.

5.5 Positive image of age

5.5.1 General

Ageing can affect competencies, motivation, values and behaviour over time. The organization recognizes, values and realizes opportunities that benefit older workers, e.g. by identifying and assigning tasks and job designs that correspond to the specific competencies of older workers that will allow them to make a valuable contribution to the organization. People often have conscious and unconscious biases in relation to ageing, making people aware of this will promote a positive image of age.

5.5.2   Recommendations

The organization, in order to support a positive image of age, should:

a)   promote an age-inclusive workforce by raising awareness about positive images of age such as diversity in life experience;

b)   provide conscious and unconscious bias training programs;

   EXAMPLE   Australia: A regional government health department runs age-inclusive workshops for all workers that covers: stereotyping, ageism, unconscious and conscious bias in relation to older workers, different concepts of ageing and how it affects older worker's productivity and ways and solutions on how to promote an age-inclusive workforce.

c)   promote, through marketing and communication, older workers' stories about the positive image of age to improve workplace brand;

d)   promote a positive image of age to stakeholders including customers, suppliers and organizational partners.

5.6   Older worker recognition

5.6.1   General

Worker recognition is about acknowledging the work and accomplishments of the individuals and teams within an organization. This can be done for all workers but ensure older workers have an appropriate representation.

5.6.2   Recommendations

The organization should, in participation with workers:

a)   develop and implement an age-inclusive worker recognition and reward-based program supported by workers, co-workers, their representatives and managers while ensuring that older workers are equally represented;

b)   ensure that all managers at all levels of the organization demonstrate through their behaviour that they:

   — acknowledge and understand their older workers;

   — value current work performance and overall productivity of their older workers;

   — consider the suggestions and comments from their older workers;

   — recognize individual capabilities;

   — allow for the possibility of working beyond retirement age and/or return to work.

6   Workforce planning, recruitment/ re-entry and work allocation

6.1   Workforce planning

6.1.1   General

Workforce planning is necessary to inform organizations of the current and future trends in the internal and external environments that could impact the future sustainability of the organization, and to allow them to be adaptable to maintain their competitive advantage. Workforce planning is the systematic identification, analysis and planning of organizational needs in terms of people and needed competencies. This can include the planning and measuring or development of strategies to enable

planning for an age-inclusive workforce. The organization can broaden its employment strategy to include the need to retain older staff and not lose their experience.

An age structure analysis forms the basis for workforce planning. The processed data can be interpreted in connection with the work and its demands.

NOTE   Refer to ISO 30409 for guidelines on workforce planning.

6.1.2   Requirements

The organization shall conduct age-inclusive workforce planning according to their organizational needs in relation to their workforce.

6.1.3   Recommendations

The organization should:

a)   use strategic workforce planning as a tool to assess the organization's exposure to age demographic changes;

b)   understand where their own organization and their industry sector is trending with respect to an age-inclusive workforce;

c)   understand how the local or global labour market is trending, over time, to understand where to recruit or re-train the existing workforce;

d)   monitor recruitment, progression and redundancy rates by age to identify areas of under-representation in the workplace;

— periodically conduct a skills gap analysis by age;

— periodically conduct a critical position analysis by age;

— periodically compare skills gap analyses and critical position analyses with retirement intentions and request by workers for further skill development.

6.2   Recruitment and re-entry of older workers

6.2.1   General

Individuals, particularly including already and nearly retired workers, can be considered for recruitment and re-entry to the organization's workforce. This includes workers with long careers in other organizations or sectors.

Having an age-diverse interview panel with a generational peer, which is someone of the same age, can improve success rates in recruiting older people and can lead to longer employment for older people. Age inclusive advertisements, recruitment panels and on-boarding strategies would complement the organization's approach to the recruitment and re-entry of older workers.

6.2.2   Requirements

The organization shall:

a)   have policies and procedures for recruitment and re-entry of older workers into the workforce;

b)   make a public statement about the organization's commitment to recruit the best possible people, regardless of age.

6.2.3 Recommendations

The organization should:

a) open-up apprenticeship (e.g. "returnships") schemes to older workers and people re-entering the workforce;

b) train interview panel members to remove barriers in recruiting older people;

c) offer vacant positions as job-shares where possible;

> EXAMPLE   The Netherlands: A recruitment agency specializes in workers aged 50 years and over and provides work for older people in small, medium and large organizations.

d) consider other ways of advertising for recruitment beyond online advertisements, e.g. job-fairs, newspapers, posters, using organizations specializing in recruiting older workers, etc.;

e) have a checklist for recruitment processes that include a criterion that age balance is present on the recruitment panel;

f) have an age-diverse interview panel that includes a generational peer;

g) use age-neutral language in the organization's job postings and application forms;

h) provide on-boarding training including explanation of the importance of an age-inclusive workforce;

i) have a colleague of similar age helps settle into a new workplace.

6.3 Work allocation

6.3.1 General

Work allocation directly impacts older workers wellbeing, relationships, motivation, and the organization's overall collective intelligence, capability and output.

6.3.2 Recommendations

An organization, its managers or their delegates should analyse, assign and allocate work to their older workers by:

a) understanding the nature and suitability of the work that older workers might contribute to;

b) checking the amount of work available to an older worker and match with the agreed availability of the older worker to perform that work;

c) communicating any suggested allocation details to the older worker.

7 Work design

7.1 Worker capability – responsiveness to individuality

7.1.1 General

The organization, when designing and adapting workplaces and work, adjusts them to the worker's capabilities as applicable. Managers of the organization recognize major events that can affect a worker's skills and abilities. Managers are sensitive to the older workers' needs and events that occur at different life stages. They also take into account each individual worker's personality and performance capability.

Managers are responsible for recognizing and harnessing individual potential regardless of age and for creating performance-enhancing conditions. This is enhanced by considering the older workers wishes and suggestions regarding the design of their workspace as well as the individual's life circumstances.

NOTE　　　See also Annex A, which gives information on the concepts and effects of ageing.

The organization promotes a structure that supports older workers to access and engage with their relevant manager(s) to discuss their current job demands and their personal circumstances, such as job fit, their capability and performance enhancing conditions and other opportunities to contribute to the organization.

7.1.2　Recommendations

The organization should in relation to older workers:

a) have policies and procedures concerning employment consultations within the organization regarding job content and orientation;

b) provide opportunities for older workers for performance reviews and informal meetings or workshops to discuss job-fit;

c) promote internal social dialogue with older workers, workers' representatives and the appropriate managers about their job content, development, and possible needs for adaptation;

　　　NOTE　　　See also to Annex B, which deals with individual continual career development planning.

d) support the older worker's needs to maintain and acquire the knowledge and skills to improve capability; (see Clause 9)

　　　EXAMPLE　　　Norway: A large company provided individual seminars for older workers to raise awareness of the responsibility for their own careers and their own competence development.

7.2　Flexible work arrangements

7.2.1　General

Managers and workers work together in identifying possible improvements in job design, work organization, work autonomy and control.

Options for flexibility can include a long- or short-term switch to part time, offering flex-time, job sharing, telecommuting, job redesign, the possibility of swapping shifts, unpaid leave and remote work.

NOTE　　　Work scheduling includes working hours and shift work. This can include tasks and cycle times such as: improving work scheduling; allowing time to adapt to new tasks, the flexibility in working hours and in taking rest breaks; allowing choice of night shift work or choice of team versus individual work; converting overtime pay and bonuses to time-off as an option.

These improvements can have varying impacts on all workers, especially on older workers, depending on their individual capacities and circumstances and could also help them with health problems, increased caregiving responsibilities or disabilities to remain at work and encourage them to stay in the workforce longer.

7.2.2　Requirements

The organization shall have policies and procedures concerning flexible work arrangements that are mutually agreed between managers and older workers that:

a) support all workers, including older workers, that work shifts are chosen with due regard to their capacity and needs;

b) where required, such as when experiencing health issues or other personal responsibilities, allow older workers to have a flexible and individually tailored approach to work-life balance, including:

— length of breaks;

— events in private lives;

— paid or unpaid leave.

c) improve older worker retention and satisfaction through allowing flexibility, for example, through offering choices of:

— work location;

— working in a team or independently;

— contract types;

— level of autonomy;

— role changes;

— career breaks;

— job-sharing/job rotation;

— hours of work;

— adjustment of roles, tasks and workload within the workplace.

d) offer older workers opportunities to move to physically less demanding work when that work is causing undue stress, pain or risk of injury or illness.

NOTE   For SME's, this can be done on a case-by-case basis.

EXAMPLE   Finland: A large organization has an older worker program which is a collaboration between management, and workers aged 55 years and over. The older worker, together with their direct supervisor, create a career plan that includes an assessment to what degree their duties, working hours and working conditions need to change. This leads to increased retention of older workers.

8   Health and wellbeing

8.1   Health management in the workplace

8.1.1   General

Health management includes all organizational activities that aim to maintain and promote workers' health, wellbeing and work ability. Work ability consists of compatibility and the balance between a person's physical and mental resources and the work demands. Work ability is based on a person's physical, cognitive, and social functioning capacity. A healthy lifestyle enables all workers for continued workforce participation and productivity.

Health management is characterized by a holistic approach. This means that not only specific interventions are addressed but also that health-promoting work design and leadership are addressed. Health and wellbeing programs have been shown to provide a return on investment for organizations beyond occupational health and safety programs. A more comprehensive understanding of prevention is necessary, integrating work design, corporate health management and lifelong learning.

8.1.2 Requirements

The organization shall:

a) continually evaluate health management policies and practices and adapt them to the older workers' needs;

b) facilitate the return to work of workers with injuries or illness by preparing the return with their work team and adapting the work.

8.1.3 Recommendations

The organization should:

a) follow evidence-based practices for health initiatives that are cost-effective and improve health;

b) use a holistic approach when designing health-related activities for older workers;

c) have voluntary confidential medical services and health tracking adjusted to all workers, especially older workers' needs;

d) allow older workers to be consulted and participate in the development and implementation of health management policies and practices;

e) facilitate rehabilitation and psychological wellbeing services for workers with injuries or illness, which in turn improves the likelihood that they will return to work by improving fitness, strength and physical flexibility;

f) improve all workers' health literacy.

8.2 Physical health in the workplace

8.2.1 General

Physical health and physically healthy work are important for continued workforce participation and productivity. As people age, chronic conditions can increase. Organizations can help their older workers to stay physically fit. Workers can manage their physical health through a number of workplace programs. Firstly, building muscle strength (e.g. weight training) is critical during ageing. Secondly, endurance/ aerobic training (e.g. cycling) that increase breathing and the heart rate is important for physical health. Thirdly, self-management of chronic conditions is increasingly playing an important role.

8.2.2 Recommendations

The organization should:

a) have policies and procedures focusing on physical health in the workplace;

b) provide preventative measures, such as: health screening, immunization clinics, health surveillance, medical check-ups, and assessment of functional capacities;

EXAMPLE 1   Japan: A company provides annual medical check-ups as a duty of care to their workers. Employees diagnosed with a high risk of lifestyle-related diseases receive health guidance from the medical insurance association the company belongs to. Confidential health-related information is not accessible to the organization.

c) support workers who develop health conditions and disabilities either to continue working or to manage their return to work within their capabilities;

d) provide education and training to prevent physical occupational illnesses;

e) provide timely access to physical healthcare programmes, e.g. back care, including information on rehabilitation and return to work;

EXAMPLE 2   Where possible, the provision of bicycle racks and showers, to encourage hygienic exercise, before and after work. The provision of showers also facilitates hygienic lunchtime sporting activities.

f) ensure healthy working conditions for workers with chronic health problems, or a disability through making adjustments to:

— work equipment, including personal protective equipment;

— working environments;

— working hours;

— intensity of task demand;

— shift working arrangements.

8.3   Mental and social health in the workplace

8.3.1   General

Mental health in the workplace has become more widely examined by organizations. Workplaces increasingly examine which psycho-social hazards harm mental and social health in the workplace.

NOTE   The organization can ensure that there is alignment between this document and ISO 45003 when it comes to issues around workplace mental health.

Psycho-social risks arise from a number of workplace issues such as, ageism, poor work design, organizational structure, a sense of disharmony in the organization's management and poor social context of work. These can result in unhealthy psychological, physical and social outcomes such as unhealthy work-related stress, anxiety, burnout or depression. Some examples of psycho-social hazards are:

— poor work-life balance;

— workload is too low or too high;

— conflicting demands and lack of role clarity;

— lack of involvement in making decisions that affect the worker;

— lack of influence over the way the job is done;

— poorly managed organizational change, job insecurity;

— ineffective communication, lack of support from management or colleagues;

— psychological and sexual harassment, third-party violence and abuse.

8.3.2   Recommendations

The organization should:

a) monitor workloads for all workers, especially to ensure that older workers are not overloaded or under stimulated;

b) monitor working hours, shift work, and overtime to ensure that older workers are working in a sustainable healthy manner;

c) monitor holiday use to ensure that older workers are taking their full entitlements;

d) offer additional mental health support and community resources, internally or through external service providers;

> EXAMPLE   Employee assistance program (EAP) for older workers who are experiencing stress, bereavement or terminal illness of family members.

e) provide information, activities and education that improve older workers' mental health, including, stress management, burnout prevention, time management and workable grievance procedures;

f) ensure top management understands the impact of organizational restructuring/change on older workers' mental health and acts preventatively when required.

> EXAMPLE   Japan: A company with more than 50 employees provides annual mental stress check-ups as a duty of care to their workers.

8.4 Dementia in the workplace

8.4.1 General

Although age is the strongest known risk factor for dementia, it is not a normal part of ageing. Globally, dementia is rapidly increasing, including among people aged younger than 65 years of age. This means increasing numbers of workers will care for someone with dementia and more older workers will develop dementia. Problems at work can include difficulty communicating thoughts to colleagues, difficulties with memory, changes in behaviour and/or doing multiple tasks at the same time.

Age-inclusive workplaces can address several factors that could influence workers with dementia by:

— increasing awareness and understanding of how dementia affects workplace functioning for both people with dementia and their colleagues;

— increasing understanding that some people with dementia are able to continue working, especially in the early stages;

— acknowledging the progressive decline of the ability to work, for people with dementia;

— considering occupational health and safety implications.

8.4.2 Recommendations

Organizations should:

a) develop and implement strategies to enable continued workforce participation for older workers living with dementia and working carers who also provide care to family members or friend living with dementia;

> NOTE   For detailed information on working carers, see ISO 25551.

b) increase the level of awareness and understanding among all workers about the symptoms, needs and capabilities of older workers living with dementia;

> EXAMPLE   An organization with a high proportion of older workers contacted their local or national dementia association to conduct dementia awareness raising training among management and workers such as early signs of dementia and how to communicate effectively. They also provided free advice on how to change the work environment to ensure a safe and productive work environment. This included breaking work into smaller parts offering reminders in their work routine and keeping workplaces clutter free.

c) foster a workplace where people with dementia are respected;

d) monitor and consider adapting the work a person with dementia does to ensure healthy and safe work continues (see Clause 7);

e) consider providing workers with dementia a coach, mentor or assistant when needed, who they approach, and who approaches the worker;

EXAMPLE   Republic of Korea: The Korean government operates regional Dementia Relief Prevention Centres in terms of dementia prevention and raising awareness on dementia symptoms. The Centre also provides support workers to help the person living with dementia receive support in having their work modified to meet the worker's capabilities.

f) create "transition out of workforce plans" tailored to the needs of workers living with dementia.

8.5   Workplace health promotion

8.5.1   General

Workplace health promotion (WHP) enables older workers to increase control over the factors that influence their physical, mental and social health and thus their wellbeing, quality of life and ability to work. WHP addresses areas not necessarily covered in legislation or Occupational Health and Safety (OHS) programs (see 8.6). This can include healthy lifestyles, the organizational environment and non-work factors that influence work such as family, caregiving responsibilities, commuting conditions (e.g. driving home after a nightshift), and community factors that affect workers' health.

Workplace health promotion is most effective when organizations partner with organizations outside of the health sector, including, but not limited to, media and industry associations. Competitions and awards in workplace health promotion activities are also effective mechanisms.

EXAMPLE   Various organizations across countries: Workplace health promotion programs improve worker engagement, morale and "team-cohesion". Organizations from different countries encourage workers to participate in a corporate challenge to take 10 000 steps per day. Workers form teams with a team captain and receive a pedometer. Workers complete their results online and then make competitive game comparisons online and receive awards to increase motivation. This WHP has improved sleep among participants.

Moreover, managers and workers can act as role models for healthy behaviours and promote a healthy work environment.

8.5.2   Requirements

The organization shall:

a) have policies and procedures concerning health promotion, with special consideration of older workers;

b) include older workers in the design and implementation of health promotion programs and activities.

8.5.3   Recommendations:

The organization should:

a) develop workplace health promotion partnerships, including community health and sporting organisations.

EXAMPLE   If workers live in polluted air, it can be more useful for the organisation to partner with local community organisations and health providers to tackle that issue before starting any other programmes in health promotion.

b) provide workplace health promotion programs, during or out of working hours, that foster physical exercise, healthy eating, non-smoking, bike-riding or walking to work or promoting work-life balance;

c) encourage older workers to take an interest in their health and fitness;

d)   deliver health guidance and education related to lifestyle diseases for older workers;

e)   encourage or provide voluntary and confidential regular individual health checks for older workers;

f)   systematically collect, analyse, evaluate and improve health behaviours in the organization.

8.6   Occupational health and safety

8.6.1   General

The organization has and supports an organization-wide occupational health and safety system or program. It applies to universal design and the need for modifications to the workplace that facilitate safe working practices.

NOTE 1   For further information on the establishment and management of an occupational health and safety system or program, refer to ISO 45001.

NOTE 2   Legal requirements for organizations to provide an occupational and safety system or program vary per jurisdiction. It is the user's responsibility to determine how applicable these and other requirements relate to the application of this clause.

8.6.2   Requirement

The organization's occupational health and safety system shall be developed from the results of an assessment of risk, taking into account older persons needs in relation to the work environment, and its accessible design aspects, for example lighting, noise, temperature, floor surface and wayfinding.

EXAMPLE   Republic of Korea: Hospitals and nursing homes are changing their lighting by using energy-efficient lights as a way to reduce trips and falls caused by the glare of non-LED lighting.

NOTE   For further information on lighting and task requirements for ageing workers, refer to CIE 227.

8.7   Risk assessment program

8.7.1   General

A risk assessment is a systematic, analytical process in which potential hazards at the workplace are identified, and the likelihood and consequences of potential adverse events are determined. From this assessment, organizations can analyse and evaluate the available information to identify hazards and to put measures in place to eliminate or control the risk of harm from the hazard.

Specific risks for older workers, e.g. diminished reflexes and physical control, can be determined through a risk assessment program.

NOTE   The risk evaluation process compares the results of risk analysis with risk criteria to determine whether the risk and/or its magnitude is acceptable, tolerable or needs mitigating.

8.7.2   Recommendations

The age-related risk assessment program should include:

a)   ways and means for hazards and risks to be identified and reported to top management;

b)   conducting risk assessments at least annually;

c)   involving older workers, their representatives and managers in risk assessment and prevention programs.

NOTE   See also Annex A, which gives information on the concepts and effects of ageing.

8.8 Ergonomic workplace design

8.8.1 General

The organization (re-)designs and adapts equipment, work, processes, and the environment to support older workers. This is particularly important as the sensory perception as well as physical and cognitive ability can decline with age.

8.8.2 Requirements

The organization shall, with the consultation and participation of older workers, worker's representatives, managers and top management:

a) have policies, procedures and programs that take into account accessibility, ergonomics and human factors;

b) consider whether the workplace design functions adequately for a multi-generational workforce to improve productivity, communication and inclusiveness.

8.8.3 Recommendations

The organization should:

a) adapt the workplace's physical and mental demands to the older workers' individual capabilities;

b) address ergonomic risks through workplace and equipment modifications in the first instance;

c) make adjustments on individual needs as well as age;

d) simplify machine operation such as making tools easy to reach, visible and easy to use;

e) improve work task-design for older workers;

f) ensure, through the organization's procurement policy, that products and services purchased by the organization follow the principle of universal design;

g) consider providing assistive technology and use of adaptable tools, technology and equipment.

NOTE   While assistive technology is necessary for many impairments, accessibility to the workplace is also a necessity for workers. For instance, a noisy environment will disturb hearing aids, inaccessible software excludes visually impaired workers, inaccessible premises hinder workers with wheelchairs, mobility impairments, etc.

9 Career development

9.1 General

It is beneficial to support workers in their professional and personal development during their entire working life. Emphasizing the importance of lifelong learning through continued education and training is an on-going process.

To support this, there can be opportunities for career development through internal advancement, mechanisms of challenge, rewards, promotions and the provision of long-term, periodic career coaching and workshops to support the older worker.

Organizations are sensitive to and respective of the concerns that older workers can have (see 7.1). Career planning can be just staying where they are.

NOTE   For example, organizations can:

— accept that some older workers might not be interested in career progression or further advancement but still wish to take part in work-related education and training;

— recognize that older workers fear disclosing the desire to retire in a few years in case they are excluded from career progression.

9.2 Continual career planning

9.2.1 General

Planning for each individual worker's future is an ongoing process at all ages and stages of the work life.

This could be done through individual meetings between managers and workers and by providing professional workshops that allow for self-reflection on abilities, competencies and goals.

NOTE   Speed is not always the most important factor to performance. Instead of a fast pace, one job could value a steady, consistent pace, while another could hold accuracy, thoroughness, and attention to detail in high regard.

9.2.2 Recommendations

The organization should:

a) have policies and procedures concerning ongoing career development that clearly state that older workers are included;

b) observe merit-based promotion or job rotation regardless of age;

c) ensure that informal and regular conversations about career planning are taking place with older workers;

   Note   See Annex B, which provides information on individual continual career development planning.

d) identify and use formal and informal competencies that older workers have acquired overtime;

e) have a mechanism (based on skills, experience, performance, interest and personal perception of the working environment) that would allow older workers and workplaces to easily understand the career development process and how to modify it to meet specific needs and competencies;

   EXAMPLE   Republic of Korea: A large corporation has provided a life planning program for older workers to look at the areas of work, finance, family, leisure, health, and relationships. Participants look back on their own past and identify practical steps for areas that they think need further improvement. From 2011 to 2016, the company carried out programs to prepare for reemployment and start-up preparation programs, including life planning and writing resumes.

f) provide part-time or job-sharing options when possible.

9.3 Training and development solutions

9.3.1 General

In a world with rapid demographic, economic and social changes in the workforce, workers want to update and renew their knowledge and skills in order to maintain or enhance their competencies and to remain active and competitive in the labour market. That need is particularly relevant for older workers as they, now and in the future, are staying in the workforce longer.

The organization can provide training and education aligned with the worker's professional, educational, and life experience as well as with organizational goals and strategies. Further, training content and methods can be targeted towards specific groups. Recognition of prior learning, through formal and informal education and experience, can assist especially older workers in training and development.

NOTE 1   To provide training and learning via e-learning, refer to the ISO/IEC 24751 series.

NOTE 2   To systematically align training and education to the individual needs of the ageing workers and organizational goals and strategies, ISO 10015 can be referenced for this purpose to ensure return on investment regarding the development needs of the individuals and organizational performance.

9.3.2   Requirements

The organization shall:

a) have policies and procedures concerning training and education appropriate for older workers' needs;

b) support older workers' participation in training and education, self-improvement activities and certification.

9.3.3   Recommendations

The organization should:

a) review, redefine and re-evaluate managers' and HRMs´ understanding of the knowledge and expertise of older workers in relation to training and development;

b) recognize "prior learning";

   EXAMPLE   An organization setup a Recognition of Prior Learning (RPL) mechanism that enabled older workers of diverse backgrounds to receive formal recognition of their existing knowledge, skills and experience. This allowed workers to know what competencies they had acquired through experience or previous training, so they could determine their starting point for future learning and development, and reduce duplication in training for the same skills.

c) provide opportunities to acquire new skills required for employment and/or for future employment;

d) monitor and follow-up the results of customized training and career development for older workers;

e) collaborate with education providers to make learning more accessible for older workers;

f) identify the need for customized training time for older workers and the need for applying different levels of learning and learning methodologies;

g) encourage older workers to acquire new skills and use new technologies.

9.4   Enabling development steps, job changes and career breaks

9.4.1   General

Modifications to a worker's current position, function or job can often be done to reflect the specific competencies, performance results and development interests of the worker.

NOTE   For example, this could be achieved by increasing job responsibilities, inclusion into other projects, or a horizontal or vertical change of position, which could also mean an additional apprenticeship or a new job within a different department.

Short-term career or lifestyle breaks or sabbaticals of a few months allow older workers to come back refreshed, and allows for renewed creative thinking, which can lead to increased productivity, new initiatives or innovative projects. This could be in the form of leave with or without pay, long service leaves and others.

9.4.2   Recommendations

The organization should:

a) have policies and procedures concerning career development and career breaks for older workers;

b) offer all workers, including older workers, where possible, short-term career or lifestyle breaks or sabbaticals of a mutually agreed duration;

c) enable development steps, job changes and career breaks, and have job matching programs for older workers;

d) have policies and procedures for increasing the flexibility regarding working longer beyond the age of retirement.

NOTE   The specific "age of retirement" varies and, in some countries, does not exist.

10 Knowledge management and intergenerational collaboration

10.1 Knowledge management

10.1.1 General

Knowledge management includes procedures for the transfer, exchange, and conservation of knowledge between different generations of workers.

Organizations can have structures in place to facilitate the transfer of knowledge from experienced workers to their colleagues and successors.

10.1.2 Recommendations

The organization should:

a) have policies and procedures concerning knowledge management and transfer, including between different generations of workers;

b) provide tools for older workers to manage, share, search and communicate content knowledge within an organization;

c) assess older workers' needs and digital literacy capabilities to ensure they are able to access, understand and use the organizational knowledge.

10.2 Intergenerational collaboration

10.2.1 General

The organization can support the mutual transfer of knowledge and experience between generations. The transfer can be in both directions, younger workers to older workers, as well as older workers to younger workers.

EXAMPLE   Germany: A defence company implemented a multigenerational strategy top down:

Several generation projects were implemented. For example:

a)   Gen Z (those approximately born between 1995 and 2010): On-boarding with a focus on how to manage personal relationships with people from different generations.

b)   Voluntary lunches to learn informally from different generations: random allocation of individuals from different generations to lunch.

Outcome: Two-year worker satisfaction surveys at all locations, across all generations were similar and staff turnover across generations was low.

10.2.2 Recommendations

The organization should:

a) have policies and procedures in place to promote intergenerational collaboration;

b) establish mixed-aged working teams to improve organizational culture and productivity;

c) provide an environment that promotes and fosters intergenerational teamwork and relationships;

d) encourage and implement mentoring programs between workers of different age;

e) implement training activities that promote intergenerational understanding and teamwork.

11 Digitalization of workplaces and innovation

11.1 Digitalization of workplaces

11.1.1 General

Digital literacy is important for older workers as the workplace becomes increasingly digitized.

Older workers are, or will soon become, part of the digitalized workplace. Therefore, technology needs to be user friendly and accessible for older workers.

Artificial intelligence (AI), machine learning, real-time data; the Internet of Things (IoT) and other digital technologies are impacting all organizations' strategies, operations, and workplaces. AI and digital innovation can allow skilled older workers to remain proficient in their roles as machines become more intelligent and can assist in meeting job demands.

As organizations have an increasing presence in social media platforms, older workers will require the tools and training to navigate and use these platforms. Also, when people use social media tools, they create larger social networks for themselves, which can benefit both the organization and the long-term employability and career progression of older workers.

Organizations need to understand the impact of digitalization and improve the organization accordingly. Developing awareness within the organization is the first step, and then enabling older workers to participate in the digital development of the workforce is the next step.

Training for older workers might be required to improve digital literacy to ensure that digital technologies and systems, crucial for workplaces operating efficiently, are in place. Such training can be provided for workers of any age.

11.1.2 Requirements

The organization shall:

a) have policies and procedures in place to enable older workers to work at home or other remote locations by the use of technology;

   NOTE 1   Refer to ISO 9241-20 for information/communication technology (ICT) equipment and services.

   NOTE 2   ISO/IEC 40500 provides recommendations for making web content accessible for users with disabilities, including blindness and low vision, deafness and hearing loss, learning disabilities, cognitive limitations, limited movement, speech disabilities, photo-sensitivity and combinations of these.

   NOTE 3   The ISO/IEC 27033 series provides recommendations to ensure network security for remote work.

b) ensure that information and communications technology (ICT) equipment and services that are used at home or other remote locations are accessible to older workers.

11.1.3 Recommendations

The organization should:

a) provide training and resources that:

    1) increase awareness in digitalization and the new opportunities it can create;

    2) improve digital literacy to ensure that digital technologies and systems crucial for the workplace are operating safe and efficiently;

    3) apply ethical principles when using innovative technologies (e.g. ensure technology is not biased towards older people);

    4) use remote systems, automation, artificial intelligence, machine learning, real-time data, IoT, robotics and other technologies as required;

    5) ensure that digital devices are accessible for older workers (e.g. font large enough, text-to-sound functionality, high enough colour contrast, etc.);

    6) provide HR staff with digital systems to manage an age-inclusive workforce effectively.

b) where necessary, provide training for older workers working remotely: certification, re-certification, accreditation in the use of digital tools;

c) create guidelines for managers to manage and communicate with older workers who work at home, in a remote-office, or other places outside the main-office;

d) have mechanisms in place to regularly evaluate and implement new technical opportunities and their accessibility, e.g. AI, robotics, assistive technologies, and digital innovation, to allow older workers to remain proficient in their roles.

11.2 Co-creation and co-design

11.2.1 General

An age inclusive workforce can contribute to the design and creation of new products, processes and services. Needs of the ageing society will bring large market opportunities for organizations and potentially organizational growth. There is a need for solutions in the design of new products and services for the growing base of customers in the ageing population.

To achieve this, an age inclusive approach in the design, ideas and innovation processes in the organization is needed. Being creative at work also enhances worker engagement. Therefore, involving older workers in the co-creation and design processes could lead to increased organizational engagement of older workers, the potential development of new markets and growing an age inclusive workforce.

EXAMPLE   Assistive technologies: A senior entrepreneur develops an app that allows older workers to manage their Diabetes better, which increases their ability to stay at work. The input of an older person with diabetes in the co-creation and design was essential to ensure the acceptance of the new product in the market.

11.2.2 Recommendations

The organization should:

a) have policies and procedures in place for older workers to participate in the design of new products and services;

b) have policies and procedures in place to enable older workers to monitor, evaluate, and provide feedback for new products and services during the design and development process to ensure

these meet the user needs: (identifying customer profiling, values and fit), designing (prototyping), testing and measuring;

c) consider the power of using digital tools to solve different situations, design creative and innovative projects and enhance communications in a collaborative way between different age ranges;

d) investigate business opportunities by activating employee resource groups if there is interest.

NOTE   To learn more about employee resource groups refer to ISO 30415.

12 Succession planning

12.1 General

The process broadly includes identifying key positions and associated capabilities, match interested workers with required capabilities, developing and implementing the succession plan and evaluation of the succession plan.

Organizations can provide succession planning to all workers, including older workers.

12.2 Requirements

The organization shall have policies and procedures for succession planning that are age inclusive and includes older workers.

12.3 Recommendations

The organization should:

a) demonstrate that capable older workers are aware of and are offered succession planning opportunities;

b) evaluate succession planning decisions in relation to older workers and improve where required.

NOTE   For additional details on succession planning: refer to ISO 30415.

13 Transition to retirement

13.1 Transition planning

13.1.1 General

Retirement transition takes planning and conversations between the organization and the worker. Information and counselling should be provided to help with the transition.

13.1.2 Recommendations

The organization should:

a) have policies and procedures in place to assist with retirement planning;

b) provide seminars, workshops and individual or group coaching for retirement planning including emotional, financial, and social issues;

c) meet with workers to discuss potential retirement transition scenarios, individual options, potential strategies and solutions.

13.2 Transition to retirement and individualized solutions

13.2.1 General

Transition plans for retirement can be tailored according to workers' individual needs.

13.2.2 Requirement

The organization shall have policies and procedures in place for possible retirement and individualized transition solutions such as:

— adjustment of daily/weekly working hours;

— flexible work time arrangements;

— individual adjustments depending on life and family situation;

— understanding why older workers leave the organization, and how to address it.

13.2.3 Recommendation

The organization should offer phased retirement through a gradual reduction of working time.

NOTE   Phased retirement can take place over shorter or longer periods of time, depending on the older workers' needs and wishes as well as the organization's needs.

13.3 Coaching for retirement life preparation

13.3.1 General

Organizations can support their workers in preparing mentally for the life change of retirement by providing advice and counselling either internally or externally. Workers can be encouraged to actively design their retirement life prior to transition.

Older workers increasingly want to stay engaged, useful and connected rather than fully retire. For many older workers, the concept of traditional retirement is disappearing. Instead of leaving the workforce, older workers are increasingly starting new careers such as working in the not-for profit sector, starting a business or volunteer work. Some older workers need to keep working for financial reasons.

NOTE   For example, individual preparation can be fostered through a structured approach that reflects individual expectations and plans. There can also be opportunities to establish alternative activities after retirement.

EXAMPLE   A large library offers staff over 50 years of age individual coaching sessions on retirement planning which includes financial planning, family, health, lifestyle and volunteering and continued employment options.

13.3.2 Recommendations

The organization should provide the older worker with:

a) information and access to individual and group coaching services for retirement life preparation;

b) workshops on various types of jobs that could interest older workers including self-employment options.

NOTE   While some organizations might provide this, it is not routine; and, HR staff might not have the expertise to provide this type of support.

14 Continuing in the workforce

14.1 General

Organizations can support flexible work arrangements to enable older workers to continue to work after retirement age. These can include former workers as well as older workers external to the organization looking for new or continued work. Programs promoting senior entrepreneurship, contracting or starting a small business can be encouraged.

14.2 Continue working, inclusion and maintaining contact

14.2.1 General

Procedures can be in place to maintain contact with workers after their retirement and help them stay engaged as part of the organization.

14.2.2 Recommendation

The organization should have policies and procedures in place to promote continual work after retirement and to maintain contact with former retired workers.

NOTE   This can be facilitated through an active management of relationships by means of an alumni network, invitations to organizational events or by allowing for voluntary work.

14.3 Individualized working options

14.3.1 General

Employment options can be offered for older workers, who would otherwise be retired. Employment for these workers can:

— benefit the organization in times of need for extra staff and demonstrate corporate social responsibility;

— provide occasional project-based work;

— provide financial benefit to older workers.

14.3.2 Recommendations

The organization should:

a) ensure that the integration of older workers into the organization is strategically planned;

b) have policies and procedures in place to promote continuing-to-work options after retirement;

c) ensure valuable employment options are available for the organization and older workers who would otherwise be full retired through open communication and early discussions;

d) ensure the competencies of older workers are checked in the same manner as other workers;

e) offer retired workers the option to work on a temporary basis at peak times;

f) adapt tasks and work time to the individual worker. This can be achieved through:

— alternative contract forms such as consulting and mentoring work,

— providing flexible work time arrangements with generally fewer hours than a full-time position.

EXAMPLE   An organization supported the creation of joint venture organizations with their retired workers who are motivated and able to continue active engagements with possible outsourcing and/or subcontracting some of the organization's processes and services. The joint-ventures were based on shared ownership between the organization and its retired workers.

15 The value of the ageing workforce's ecosystem to the organization

15.1 General

The value of the ageing workforce's ecosystem to the organization consists of three main groups of older people. Each group individually or collectively can add value to the organization as shown in Figure 2. Older people can form part of each group.

Key

CSR: Corporate Social Responsibility
B2B: Business to Business
B2G: Business to Government
B2C: Business to Consumer

NOTE   Involving internal and external older stakeholders will increase CSR, brand value and being employer of choice for the organization.

Figure 2 — The organizational value of the ageing workforce's ecosystem

15.2 Older workers

Older workers add value to the organization and working can lead to self-fulfilment and self-worth, which in turn increase older worker engagement.

Organizations for retired workers play an important role in encouraging and supporting continued participation in the community through work and other activities.

EXAMPLE   Sweden: Sweden's largest employer for retired persons describe the main key to success as flexibility – the retired person individually chooses assignments and have control how much work to do. Surveys also show that those who continue to work after their post-employment age experience increased wellbeing, both physically and mentally. The health benefits are most evident in a flexible work environment, where you have control over workload and tasks.

15.3 Community groups

15.3.1 General

The organization is part of a community environment. It can refer either to a physical space outside the organization or a virtual digital community, where there is no clear physical border. The community is an important source for relationships and resources. Intergenerational activities occur within a community that benefit the ageing workforce directly or indirectly.

Older persons can be a resource to the organization or active contributors in a community, such as cooperatives, associations, and volunteering organizations. They can be leaders in initiating peer support groups or arranging other meaningful activities inside and outside the organization or in the communities that can benefit the organization, such as providing local childcare or natural disaster assistance (e.g. volunteer rural fire service).

Some older persons in the community are carriers of cultural and local knowledge, such as agriculture and farming, traditional medicine, art, and craft work. In the context of workforce, they are valuable human resources, and can possibly create work for others in the community.

15.3.2 Recommendations

Promoting the active role of older persons within the organization.

The organization should:

a) encourage and support the active role of older workers to have self-support groups in which they have conversations and share the same interest issues;

b) take on or engage experienced older persons within the organization (e.g. they can be a role model or transfer knowledge and experiences into the community or into the organization);

Developing community participation in the ageing workforce.

The organization should:

c) encourage their workers to conduct intergenerational activities in the community;

   EXAMPLE   Thailand: A start-up business, providing services to serve the needs of older persons; short travelling trip, training on digital literacy, social media usage, e-commerce, etc. An online community was set up for their older aged customers and applied aged-friendly design for their applications on mobile phones and a website.

d) encourage workers to provide training and services for older people in the community;

e) support activities of community groups that consists of older people or groups that serve older people in the community.

15.4 Senior entrepreneurs, self-employment, micro-enterprises

15.4.1 General

Older persons do business with other businesses and governments or directly with the consumer. Some older people continue their work as self-employed, craftsmen, agriculturalists, micro-enterprises, small business owners, freelancers, part-timers, and sub-contractors. The benefit of this group of older external workers is that they can often be more flexible in work processes due to their smaller organizational size.

Senior entrepreneurship (seniorpreneurship) is rising and creating new jobs for older people. Experience shows that senior entrepreneurs are often successful in sustaining their new business, meaning continued workforce participation by older people.

NOTE   Refer to Annex E for recommendations for small and medium-sized organizations.

Organizations that encourage older workers who are planning for retirement to consider the alternative option of senior entrepreneurship contribute to an age inclusive workforce by recognizing new models of work for older people.

15.4.2 Recommendations for senior entrepreneurship

The organization should:

a) only use the recommendations in relation to senior entrepreneurs where this is beneficial for the older worker and not use the recommendations for cost-shifting, retrenchment and outsourcing;

b) consider training in entrepreneurship as part of the training options a worker has access to;

c) raise awareness of and self-belief in senior entrepreneurship as a career-option to continue in the workforce;

d) encourage and support older workers who are planning for retirement to consider becoming senior entrepreneurs (e.g. through advising older workers of networking opportunities with successful senior entrepreneurs);

e) make older workers aware of local or online training programs or activities on how to run a small business, either senior entrepreneur specific or general;

f) make older workers aware of funding aimed specifically at senior entrepreneurs;

g) use experienced senior entrepreneurs in the community to mentor or coach older workers in the organization who are interested in senior entrepreneurship, e.g. how to build a website and how to use online selling platforms.

15.4.3 Recommendations for self-employed, micro-enterprises and sub-contractors

The organization and older workers should:

a) encourage and support the use of older freelancers, self-employed, craftsmen, agriculturalists, small business owners, part-timers, and sub-contractors as suppliers where possible;

b) encourage and support the active role of older workers to have self-support groups in which they have conversations and share the same interest issues;

c) consider alternative compensation mechanisms, e.g. consultation contracts vs. regular salaried position, stock options in lieu of salary.

16 Financial literacy planning and benefits and rewards

16.1 Financial literacy

16.1.1 General

Money worries are one of the biggest sources of stress and many workers can be struggling with their finances. Financial stress can affect their performance and ability to focus at work that in turn can lead to lower productivity. Organizations who help their workers to improve their financial literacy and financial wellbeing can reduce the negative impact of financial stress in the workplace.

16.1.2 Recommendations

Organizations should consider improving older workers' financial literacy by:

a) providing opportunities for retirement financial planning within a workplace financial wellness program, and well in advance of the general retirement age;

> EXAMPLE   Canada: Financial literacy remains a priority and its Financial Consumer Agency has a program, "Financial Wellness in the Workplace", that provides strategies and resources based on best practices to help organizations build financial wellness programs to improve the financial wellbeing of their workers. They also provide a series of free, online tools and programs for consumers to use as they budget, save, plan their finances, and make important choices, whether it's about buying a new home, managing debt, or saving for retirement.

b) providing workers with the knowledge to understand how much savings they need to comfortably retire and maintain a quality of life;

c) continually bringing awareness of changes in their environment and government regulations that have an impact on their retirement;

d) allowing the organization, or the agency acting on behalf of the organization to regularly (once a year) inform the workers about superannuation, pensions and associated matters.

16.2 Benefits and rewards

16.2.1 General

Benefits and rewards can be offered to increase older worker engagement, retention and loyalty and can demonstrate that workers are being valued. Examples include profit sharing, bonuses, health insurance, provision of retirement savings, training compensation, wellness program, financial planning assistance, caregiver support programs or paid family leave.

16.2.2 Recommendations

Organizations should consider designing, implementing, and evaluating a benefits and rewards system that encourage an age-inclusive workplace.

EXAMPLE   Republic of Korea: A government funded foundation contributes to the protection of workers' health by providing various occupational health and counselling services. These are provided through the establishment and operation of the "Worker Health Centre" in order to support the healthcare of workers in small businesses with less than 50 employees.

17 Continual improvement - assessment tools

17.1 General

To measure success and ensure that the guidelines and recommendations for an age inclusive workforce are being met, the organization can perform reviews by using assessment tools.

A well-constructed set of organizational assessment tool can reveal problems before they become crisis, opportunities before they become stale, and the status of customers, workers, and systems before it's too late. By selecting and applying relevant assessment tools, trends that can indicate deficiencies in the quality of guideline implementation can be identified and addressed.

NOTE   Annex C and D provide examples of assessment tools, e.g. a simple conformity checklist; or, the use of metrics to measure the benefits and challenges to have an age-inclusive workforce.

17.2 Recommendations

The organization should:

a) research, develop and implement an assessment tool relevant to their organization's capacity;

b) provide training and orientation into the use of the assessment tool;

c) ensure that all levels of the organization participate in the assessment;

NOTE   It can be worthwhile to consider using the 'Plan-Do-Check-Act' continual-improvement-cycle as one of the assessment tools focused on an age inclusive workforce with special consideration for older workers.

d) review where, when and how changes within the organization, based on the outcome of the assessment, are made; and keep records concerning:

— review results to facilitate comparisons and trends over time;

— status of preventive and corrective actions;

— follow-up actions from previous assessments;

— recommendations for improvement;

— resource requirements.

e) after each assessment consider and schedule revisions of the assessment tool.

Annex A
(informative)

Concepts and effects of ageing

A.1 Concepts

Ageing can be considered from several different perspectives, including the following:

Chronological ageing — this relates to calendar age and is often the method used to define descriptions of groups of workers, including older and younger workers.

Biological ageing —this relates to measures of how organs or biological systems age over time and includes measures such as maximal oxygen uptake or bone density. A number of such measures are correlated with chronological age, including lung function, grip strength and hearing ability. These have relevance in relation to physical capacity requirements in different occupational groups.

Psychological (psychosocial) ageing — also referred to as subjective age; this relates to the age that people feel they are. It can also be seen in the context of the social perception of age, a perception that is influenced by age norms in society. Research has shown that subjective age can be a valid measure of the personal experience of ageing and has been associated with health and wellbeing.

Cognitive ageing includes memory, attention span, language, intelligence, brain changes and everyday functioning in familiar environments. The cognitive ageing process is more pronounced from 50 years of age, yet the decline starts from 30 years of age. Such physiological changes can be compensated by forging new neural connections due to cognitive reserves accumulated from education and learning.

Functional ageing — recognizes that there is a wide diversity in individual differences in performance in relation to chronological ageing.

Social ageing —refers to the norms associated with the chronological age of people in a given population, and their perceived roles and value in society within that population; and, it can be associated with issues such as ageism.

Organizational age — the concept of organizational age is a way to reflect the ageing of individuals in jobs or organizations. Examples of this include seniority in an organization. It also relates to issues of career stage, ageing norms within an organization and skill obsolescence.

Career age — An older person can start a new career or do returnships, which means their career age can be the same as a younger person who has also just started in a new career.

A.2 Effects

Chronological age is not the most important determinant of health, and ageing is not inevitably accompanied by illness and disease. Health is influenced by numerous other external factors, including lifestyle, exercise, and nutrition.

There are a number of changes to physiological systems with age, including reductions in aerobic power, muscle strength, stature, dexterity and mobility. The age at which these changes start to take place and the extent of such changes varies widely across individuals. For example, noticeable changes in visual performance such as object appearance, increased light scatter, reduced contrast sensitivity, slower dark adaptation, and colour vision changes will start for people at different ages.

Older workers can often compensate for losses to work-related functional capacity with strategies and skills gained through experience and assistive technologies. Physical strength and endurance are also very specific to individuals, such that some older workers can be stronger than their younger colleagues.

While some cognitive abilities decline with age, such as memory and reaction time, according to laboratory-based studies, work performance is unlikely to be affected, as older individuals can generally compensate for any decline with experience, better judgement and job-specific knowledge. Strengthening of other mental characteristics, such as ability to reason and motivation to learn, can also help older workers to compensate for any changes and maintain work performance. The key elements of cognitive performance (e.g. short-term memory loss) important for workplace health and safety, such as intelligence, knowledge and use of language, do not generally show any marked decrease until after the age of 70 years.

Older workers are more likely than younger workers to suffer from chronic health conditions, such as cardiovascular disorders and musculoskeletal diseases. This does not necessarily affect their work performance and many chronic diseases are controllable.

In contrast to some stereotypical views of the abilities of older workers, they are an asset to organizations. Older workers are often more reliable than younger workers and often show a greater level of commitment. Furthermore, turnover and (short-term) absenteeism rates are often lower among older workers, and they have a wider diversity of expertise, knowledge and skills.

A.3 Key findings

The key findings that were made in relation to the question 'What are the implications of these changes and the impacts of work along the life course in relation to occupational health and safety and sustainable work?' are summarized below:

Cumulative hazard exposure over the course of working life to a wide variety of physical and chemical hazards has implications for occupational health and, therefore, the sustainability of work.

Physiological changes can lead to the deterioration of physical capabilities. This does not necessarily affect work performance but can result in a reduced tolerance of certain aspects of physical work. Long-term exposure to demanding work increases the impact of deterioration.

In general, the incidence of **musculoskeletal disorders** increases with age, probably as part of the normal ageing process; however, declining health does not necessarily mean a decline in job-related performance. Other factors, such as work demands, can have a greater influence on the risk of developing work-related ill health than age. The increased prevalence of musculoskeletal disorders with age is most pronounced in workers involved in physically demanding jobs, irrespective of age.

Rates of incidents at work associated with more than three days of absence are lower among older workers than among younger workers. However, older workers are more at risk of a severe or fatal incident. Although less likely to be involved with an incident, older workers take longer to recover from any injury sustained. Occupation, not age, is the dominant factor that contributes to risk of injury.

Unhealthy work-related stress, anxiety, depression and post-traumatic stress disorder can increase with age and then decrease after the age of 55 years. However, this can vary by industry or profession. The causes of work-related stress in older workers can be different from those in younger workers. For instance, older workers can be more likely to experience stress because of the responsibility they have for other people's work and the workload, rather than the physical work environment.

The **impact of fatigue** and the need for recovery increase with age. However, any prevention measures for older workers do not simply assume that younger workers can take on the burden of work or different shift systems, as this will result in unsustainable work patterns and can increase the risk of burnout at a younger age. Making work less fatiguing would benefit workers of all ages.

Quality **working conditions** are associated with better physical health and psychological wellbeing than being out of work. Social support at work can contribute to a reduced likelihood of early retirement

— workers need to be managed in an age-appropriate manner. Many older workers have caring responsibilities outside the workplace and this can lead to fatigue, information overload, etc.

Some older workers, but not all, have difficulties with **shift work** and might need additional support or the option of non-shift work. Age is associated with changes in sleep patterns and a reduced tolerance of routine changes such as those usually associated with shift work.

In summary; many **age-related changes**, such as hearing or vision changes, that could affect safety at work can generally be corrected with simple aids or work adjustments. This also applies to circumstances in which chronic disease affects performance at work. Measures that make work less demanding for older workers would often benefit all workers.

Annex B
(informative)

Individual continual career development planning

The development and success of the organization is based on the workers' commitment, motivation, and competence. Therefore, career development interviews can be based on what the workers need to be able to contribute to the organization in the best possible way in the current and future workplace as well as taking into consideration the individual's aspiration.

The career development plan is a regular recurring conversation between the worker and the manager where the worker's and the organization's situation are discussed. The purpose is to develop the worker and the organization as a whole. The career development plan usually consists of the following parts:

Organization goals

The organization's overall goals and the department's goals in the coming year are described, as well as the goals and any changes that affect the worker.

The worker's goal

The worker describes their own goal for career development in the coming year. In what direction does the worker want to develop?

Knowledge

The worker lists what knowledge is required in the work today and how the workers skills correspond to the knowledge. What knowledge does the worker need to develop or acquire to achieve the organization's goals? What knowledge does the worker need to develop in order to achieve their personal career goals? Here the worker also describes what knowledge might be needed to be supplemented, to be prepared for another service.

Abilities

The current situation in relation to the desired position when it comes to abilities that are used to perform the work in an acceptable way, such as collaborative ability, administrative ability and leadership ability are described both from the workers and the manager's point of view. What skills are required for the worker's own career development in the future?

Actions

The career development plan describes the specific actions steps that the worker and the organization need to take to achieve the agreed goals. For example, job descriptions, mentoring, and trainee programs can improve the workers' career development.

Time planning, budget, and responsibility

Time, money and responsibility need to be clearly allocated so that the specified actions can be implemented.

Follow-up

Follow-up career planning development meetings are planned to review progress.

Annex C
(informative)

Assessment tools for an age-inclusive workforce

C.1 General

Management reviews the organization's guidelines for an age-inclusive workforce at planned intervals, to ensure its continuing suitability, adequacy, and effectiveness. This review includes assessing opportunities for improvement and the possible need for updating the organizations guidance documents such as codes of practice, human resources policies, occupational health and safety programs, risk assessments, preventative programs, policies and procedures concerning different aspects of operations in the organization.

Key stakeholders (e.g. customers and external parties) can be included in the review when appropriate.

To derive the most benefit from the organization's assessment tools, it is important to keep them simple. The older worker needs to understand the tools, how they can make changes, and what is expected of them. This communication element is an important detail, and it is important that the workforce has a sense of what success might look like.

NOTE   For more information see ISO 9001:2015, 9.3.

C.2 Worker feedback through qualitative and quantitative methods

Success in implementation of the guideline is best measured through using quantitative and qualitative methods. Quantitative methods can, for example, include regular surveys (see Table C.1), already routinely collected data analysed by age range. Qualitative analyses can for example include interviews, observations, or focus groups and can help in further understanding the results of surveys. The results of surveys or routinely collected data can be quantified and form the basis for metrics. See Annex D.

The views of the older workers are of significance as they provide the basis for development of the organization's guidelines for an age inclusive workforce. It also provides the older worker with the opportunity to influence the content and development of the organization's guidelines.

Table C.1 — Example of a survey section based on the recommendations to measure the success of implementing the ageing workforce guideline

Please rate how much you agree with the following statements							
	Fully agree	**Partially agree**	**Neutral**	**Partially disagree**	**Fully disagree**	**Not applicable**	**Comments**
Intergenerational collaboration							
My organization:							
a) has policies and procedures concerning intergenerational collaboration							
b) encourages mixed-aged working teams to improve age-diversity in the workplace							
Etc.							

C.3 Self-assessment/audits / checklists

Self-assessment is a simplified "audit" carried out by the management and the workers themselves and is done when the organization critically wants to analyse its own work. The advantage of self-assessment is that it requires minimal extra resources and is easy to use.

Audits are performed against established criteria, in the form of quality indicators, practices and guidelines. Audits can be performed by an internal party with no connections to the audited part of the organization or, if suitable, an external party.

NOTE   For more information on audits see ISO 9001:2015, 9.2.

C.4 Implementing the recommendations

The example of the assessment tool described below is intended to assist organizations in determining if the recommendations within this document were implemented.

Table C.2 provides an example with recommendations from the body of this document. The user can complete the table or select the recommendations that are of interest for the organization.

Users of this self-assessment checklist can indicate that the recommendation was implemented either completely, partially, not yet or is not applicable. Corrective actions, task assignments or other information can be placed in the "Comments" column.

Evidence to demonstrate whether the recommendations were implemented can be obtained from the following sources and the applicable ones are noted in the comments field: documentation, worker feedback by surveys and/or interviews, self-assessment, audits, metrics.

Table C.2 — Example of an implementation checklist based on the recommendations to measure the success of implementing the ageing workforce guideline

Please rate how much you agree with the following statements					
	Was the recommendation implemented?				
Specific recommendations	**Completely**	**Partially**	**Not yet**	**Not applicable**	**Comments**
Intergenerational collaboration					
The organization should: **a) have policies and procedures concerning intergenerational collaboration** **b) encourage mixed-aged working teams to improve age-diversity in the workplace** **Etc.**					

C.5 Metrics

All metrics need to be clearly defined so that an organization can benchmark its success. One way to keep metrics understandable is to use the SMART (specific, measurable, achievable, relevant, time-based) model.

Metrics needs to be reliable and give out the same answer no matter who calculates it. They also need to be standardized, with data being collected in exactly the same way across single or multiple departments, facilities and offices, nationally or internationally.

The successful implementation of metrics and especially a new metric needs to have the approval and interest of top management. Using a new set of metrics to measure performance is a change

that might well attract resistance from across the organization, so high-level endorsement and open communication is needed to get everyone on board.

Annex D
(informative)

Examples of metrics to measure success and outcomes

D.1 General

This annex provides information to enable organizations to create metrics that are applicable to the organization's:

— context (e.g. size, supply and demand of older workers, etc.);

— level of maturity;

— Priority areas.

Organizations can also consult to design and identify relevant matrixes:

— ISO 30414;

— The Global Reporting Initiative (www.globalreporting.org);

— The Integrated Reporting Initiative (www.integratedreporting.org).

It is important to measure outcomes in both financial and social terms.

D.2 Age inclusive workforce areas and metrics

Table D.1 provides example of metrics for each main category of the guideline. Table D.2 provides examples of financial metrics. These are then followed by more detailed examples in Table D.3 to Table D.5.

NOTE 1   Examples are derived from ISO 30414.

NOTE 2   Age group will depend on number of people in the organization, industry and strategic requirements.

Table D.1 — Example of metrics to measure the success of implementing the age-inclusive workforce guideline

Ageing workforce areas	Human capital reporting metrics
Age-inclusive governance and leadership	% of managers who have participated in age conscious and unconscious bias training in a two-year period compared with total number of workers
Organizational culture	Engagement/satisfaction/commitment by age category
	Retention rate by age category
Workplace Communication	Number of stories in a given period about older workers
Equal opportunities	Number of complaints received related to ageism
Positive image of age	Number of positive news stories per annum that relate to older workers
Older worker recognition	% of workers by age category that report they feel valued at work
Workforce planning, recruitment, re-entry and allocation	Age profile of the workforce: % in age groups
	Age profile by positions filled: % in age groups by position type
	Age profile by critical positions filled: % in age groups by position type
	Retirement intentions over the next 1,2 and 5 years
	% of interviews that includes a generational peer
Worker capability	Number of performance reviews conducted per annum by age group
Flexible work arrangements	% of workers that agree with the statement: "My organization allows me to have flexible work arrangements enabling me to do my work"
Health and wellbeing	Lost time for injury by age group
	Number of occupational accidents by age group
	Number of people killed during work
	% of workers who participated in OHS training over a two-year period by age group
	% of people that agree with the statement "I like my work-life balance" by age group
	% of people that report being burnt out by age group
Risk assessment program	Costs spent on risk assessment prevention per annum
Ergonomic workplace design	% of workers that agree with the statement "My organization takes into account the ergonomic design of my workplace so that I can do my job properly" by age group
Career development	Average formalized training hours by age group
	Average number of days of leave without pay by age group
Knowledge management	% of workers that agree with the statement "My organization encourages mixed-aged working teams" by age group
Digitalization of workplaces	% of workers that is aware of social media guidelines in the organization by age group
Co-creation and design	% of workers that have been involved in the product/service development process by age group
Succession planning	Number of workers aged 45 and over that have been offered succession planning opportunities
Transition to retirement	Number of workers that work on a part-time basis by age group
	Exit/turnover reasons/leaving employment by reason and age group
Value of the ageing workforce's ecosystem	Proportion of budget spent on corporate social responsibility activities in relation to older people working internally or externally to the organization
Financial literacy	% of workers that receive individual or group coaching services for financial retirement life preparation by age group

Table D.2 — Example of financial metrics to measure the success of implementing the guideline

Costs by age group			Workforce availability by age group		
	1	Total workforce costs		1	Number of workers
	2	External workforce costs		2	Full time equivalent
	3	Ratio of the average salary and remuneration		3	Contingent workforce
	4	Total costs of employment			Independent contractor
	5	Cost per hire			Temporary workforce
	6	Recruitment costs		4	Absenteeism
	7	Turnover costs			
	8	Total developing and training costs			

Productivity by age group			Succession planning		
	1	EBIT (earnings before interest and tax) /revenue/turnover rate (voluntary and involuntary) /profit per employee		1	Succession effectiveness rate
	2	Human capital Return on Investment		2	Successor coverage rate

Table D.3 — Example for reporting on leadership

Year	2015	2016	2017	2018
% of management that have participated in age unconscious bias training in a two-year period	58 %	65 %	66 %	67 %
% of staff that agree with the statement "Management supports carer leave '	48 %	53 %	52 %	56 %

Table D.4 — Example for reporting on workforce planning

What positions do older workers fill in %? (categories depend on organizational size and contexts)			
Age	Position A	Position B	Position C	TOTAL
---	---	---	---	---
<45	%	%	%	
45-64	%	%	%	
65+	%	%	%	

Table D.5 — Example for reporting on health and wellbeing

What does the health profile look like in your organizations %? (categories depend on organizational size and contexts)				
Age	Absenteeism	Injury time	Workers compensation claims (local currency) and %	Staff turnover
<45	%		(local currency) %	
45-64	%		(local currency) %	
65+	%		(local currency) %	
TOTAL	%		(local currency)100 %	

Annex E
(informative)

Recommendations and solutions for small and medium-sized organizations

E.1 General

Small and medium size enterprises (SMEs) are organizations with a limited number of workers. The definitions of SMEs vary from countries. One common definition is that organizations with between 1 and 20 workers are small, and those with between 21 and 100 workers are considered medium.

SMEs constitute a large percentage of organizations in most countries, especially in the private sector. Focusing on this sector is, therefore, important both for measures to ensure the continued employment of older workers, but also for ensuring economic predictability, sustainable solutions, and financial stability both to recruit new and to keep existing workers. Challenges for SMEs are often lack of necessary competence, which can lead to a loss of customers, termination of projects and reduced capacity; lack of secondary education possibilities for workers, and loss of experienced workers, affecting access to necessary competence and experience.

Access to the competence and experience of older workers through an age inclusive workforce policy is one of the most important measures for SMEs. Access to part-time workers and voluntary activities for older workers will play an important role.

General recommendations for public SME policy

a) Strengthen the economic incentives for professional training.

b) Provide flexibility for SMEs to get access to needed competence, through part-time work contracts.

c) Improved quality and relevance in work-related training – including digitalization training for older workers.

d) Encourage inclusive employment policies through a dialogue with employer's organisations and labour unions, including focus on older workers in public HR strategies.

e) Encourage focus on older workers in leader training programmes.

f) Include guidance in policy towards older workers at the workplace (guidebooks, training courses) for managers and workers' representatives.

g) Support older workers' entrepreneurship, including single business owners.

E.2 Recommendations for SMEs

a) In workforce planning, SMEs include older workers with relevant competence as a means to improve the organization's professional profile and to solve skills shortages.

b) Use the flexibility typical for SMEs to share the competence of older workers with the organization's business network, both to facilitate career development of the older workers themselves and to use their competence where it is most needed.

c) Include older workers as strategy planners based on their competence, experience and skills. Often SMEs do not appear to have the time and resources for strategy planning, and this is a way of securing the SME's future business.

d) Having a policy to ensure that older workers share their experience and skills with younger workers through mentoring programmes, ensuring that their competence and entrepreneurship skills are appreciated and not lost.

e) Encourage volunteer activities of former workers, to ensure both that their experience is passed on to younger workers, and to increase their own quality-of-life.

f) Have regular career planning meetings with older workers.

Annex F
(normative)

Summary of the requirements

to provide a summary of the requirements to achieve an age-inclusive workforce. Organizations of any size can use this as an effective aid in applying and using this document.

Table F.1 — Strategies and Public Statements

Leadership	Make a clear statement about being an age-inclusive organization through using organizational documents, for instance, in its vision, mission, values, code of conduct and HRM strategy - See 5.1.2 a)
	Have an age-inclusive workforce strategy that recognizes and adapts to the changing trends of ageing workforces - See 5.1.2 b)
	Adopt a total systems approach in being an age-inclusive organization – See 5.1.2 c)
Workforce planning	Conduct age-inclusive workforce planning according to their organizational needs in relation to their workforce. - See 6.1.2 a)
Recruitment	Have policies and procedures for recruitment and re-entry of older workers into the workforce – See 6.2.2 a)
	Make a public statement about the organization's commitment to recruit the best possible people, regardless of age - See 6.2.2 b)

Table F.2 — Policies and Procedures

Equal opportunities	Have policies, procedures and programs concerning an age-inclusive workforce covering all stages of the worker life-cycle - See 5.4.2 a)
	Ensure that ageism, bullying, harassment and abuse of older workers is not tolerated - See 5.4.2 b)
Organizational culture	Develop an age-inclusive code of conduct that addresses the values, beliefs and practices that states how the organization expects its managers, supervisors and workers to behave and conduct themselves towards older workers - See 5.2.2 a)
	Encourage a culture in which older workers feel valued, motivated, and can perform - See 5.2.2 f)
	Ensure older workers are included in the promotion of age-inclusive approaches and culture - See 5.2.2 g)
Ergonomics	Have policies, procedures and programs that take into account accessibility, ergonomics and human factors - See 8.8.2 a)
	Consider whether the workplace design functions adequately for a multi-generational workforce to improve productivity, communication and inclusiveness - See 8.8.2 b)
Digitalization	Have policies and procedures in place enabling your multigenerational workforce to work at home or other remote locations by the use of technology - See 11.1.2 a)
	Ensure that information and communications technology (ICT) equipment and services that are used at home or remote locations are accessible to older workers - See 11.1.2 b)
Succession planning	Have policies and procedures for succession planning that are age inclusive and includes older workers - See 12.2 a)
Retirement	Have policies and procedures in place for possible retirement and individualized transition solutions such as: adjustment of daily/weekly working hours; flexible work time arrangements; individual adjustments depending on life and family situation; and understanding why older workers exit the organization, and how this can be addressed. - See 13.2.2

Table F.3 — Health

Health management	Continually evaluate health management policies and practices and adapt them to the older workers' needs – See 8.1.2 a)
	Facilitate the return to work of workers with injuries or illness by preparing the return with their work team and adapting the work - See 8.1.2 b)
Health promotion	Have policies and procedures concerning health promotion, with special consideration of older workers – See 8.5.2 a)
	Include older workers in the design and implementation of health promotion programs and activities - See 8.5.2 b)
OHS	The organization's occupational health and safety system shall be developed from the results of an assessment of risk, taking into account of older persons needs in relation to the work environment and its accessible design aspects such as lighting, noise, temperature, floor-surface and wayfinding - See 8.6.2

Table F.4 — Supports

Flexible work	Support all workers, including older workers, that work shifts are chosen with due regard to their capacity and requirements - See 7.2.2 a)
	Where required, such as when experiencing health issues or caring responsibilities, allow older workers to have a flexible and individually tailored approach to work-life balance, including: length of breaks; events in private lives; paid or unpaid leave - See 7.2.2 b)
	Improve older worker retention and satisfaction through allowing flexibility, for example through offering choices of: work location, working in a team or independently, contract types, level of autonomy, role changes, career breaks, job-sharing/ job rotation, , hours of work, , and adjustment of roles, tasks and workload within the workplace - See 7.2.2 c)
	Offer older workers opportunities to move to physically less demanding work when that work is causing undue stress, pain or risk of injury or illness - See 7.2.2 d)
Training and development	Have policies and procedures concerning training and education appropriate for older workers' needs – See 9.3.2 a)
	Support older workers' participation in training and education, self-improvement activities and efforts to acquire certifications - See 9.3.2 b)

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