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The HRM Challenges in Age Management in SMEs

“The challenge for our society is how to reconceptualise age and work and to change attitudes that are embedded in our relationship” (Parry, Tyson, 2011:1). An ageing workforce requires a new approach to age management in organizations. This paper shows the challenges the entrepreneurs from the SME sector face in the area of age management.

The first section focuses on the analysis of age management issues that can arise in organizations. The second discusses the specific character of HRM in small and medium-sized firms. The final part of the paper attempts to explore the HRM challenge in age management in small and medium-sized firms. It presents the selected results of research carried out among older workers in SMEs by Kozminski University Human Resource Management faculty members in cooperation with the MB SMG/KRC Research Institute.

The results indicate that it is a challenge for employers from the SME sector who should take a more responsible attitude towards the ageing problems in the society and understand that age management activities undertaken in the employee interest can benefit the collective. They should undertake activities aimed at reducing the negative impact of age categorization on social relations in the organization and expand age management practices by adopting a long-term strategy.

Keywords: HRM in SMEs, diversity management, HR practices in age management.

Introduction

An ageing population and the process of professional deactivation of older workers is a serious problem on the Polish labor market. The employment rate in the fourth quarter of 2011 was 50.8%—higher for men (58.9%) than women (43.4%). For people 50+, the overall indicator was 31.3%, with 40.3% in the case of men and 24.4% for women (Migula et al., 2013).

The forecast for future demographic changes is not favorable. The number of people in the post-working age is increasing while the working age population is steadily decreasing (Migula et al., 2013). For this reason, measures to increase the professional activation of older people are becoming necessary.

Research on the conditions of professional activation is often focused on relations between individuals and public institutions, which is mainly the result of the implemented model of the national social function. Hofacker points out that such an approach disregards the role of the relations between employers and employees (2010:16–17). This paper focuses on entrepreneurs from the SME sector, a sector that significantly influences labor market conditions (Report, 2013:24).

SMEs¹ in Poland constitute 99.8% of all businesses. They play an important role in economic development, generate almost half of the GDP, influence the level of competitiveness of the Polish economy through export, and determine the standard of living of society. The SME sector is an “essential core of the economy” (Report, 2013:5).

Following the CSO, in 2011 6.3 million people worked in SMEs in Poland, i.e. 70.2% of all working persons. The role of SMEs in job creation is crucial. As Juchnowicz emphasizes, “their effective development is a necessary condition for the ability of the economy to create new positions and to increase productivity and competitiveness” (2013: 52). In this context, SMEs can play an important role in the professional activation of the older people.

Age Management

A new concept of age management has been distinguished in management in response to the increasing differences in employee age, the ageing of the work force, and the low professional activation of the older people. It can be defined as part of diversity management. Workforce diversity is among the few social phenomena that stir significant interest (Prasad, Pringle, and Konrad, 2006:1). Prasad, Pringle, and Konrad use a broad definition: “At its core, the concept of diversity is all about matters of ‘difference’ and ‘inclusion.’”(2006:2).

Thus, workforce diversity becomes a resource that—from the business point of view—needs to be managed (Kirby and Harter, 2003:36). Mor Barak notes, “Diversity management refers to the voluntary organizational actions that are designed to create greater inclusion of employees from various backgrounds into the formal and infor-

1 Criteria for inclusion in the SME sector include employment up to 249 persons, annual turnover not exceeding 50 million euro or an annual balance sheet total not exceeding 43 million euro, and autonomy—no more than 25% of the capital or voting rights can be held by another enterprise (OJL 214 of August 9, 2008).

mal organizational structures through deliberate policies and programs” (2011:235). According to Riach, diversity management is the reaction to the limitations of equal opportunities based on the premise of eliminating discrimination (2010:44). Diversity management, equal rights legislation, and affirmative action programs are seen as a continuum (Mor Barak, 2011:237).

Age management is a topic mostly represented in the field of managing diversity. Some researchers refer age management to a diversification of actions taken due to the age diversity of all employed (Liwiński and Sztanderska, 2010:3). This perspective is followed by research on the differences and similarities in attitudes and organizational behavior of the four generations—traditionalists, Baby Boomers, Generation X, and Millennial (Green, Eigel, James, Hartmann, and Malter, 2012). Others focus on activities targeted at older people. A. Walker states: “The term age management may refer specifically to the various dimensions by which human resources are managed within organizations with an explicit focus on workforce aging via public policy or collective bargaining” (2005).

Age management is further complicated by the ambiguity of the age concept, understood either only as the differences in biological age or also in other dimensions (Schwall, 2012:169). Based on gerontological research, The Sloan Center on Aging and Work at Boston College in Massachusetts refers to the multiple dimensions of age and age-related factors as the Prism of Age, which constitutes a conceptual framework presenting the complexity of the age concept as the differentiating factor (Pitt-Casouphes, Matz-Costa, and Brown, 2010:83–88).

Based on research, a thesis was constructed in 2010 stating that “in Poland there is as yet no model of age management, where only single systems are developing” (Kwiatkiewicz, 2010:27). Although in the year 2010 Poland was in a phase of formulating “preliminary standards of age management” (Liwiński and Sztanderska, 2010), in 2014 it is possible to point out various examples of tools for age management used by companies² in all important areas of age management: employee

2 Examples of best practices in Polish companies can be found in studies such as: A. Kwiatkiewicz, *Analiza dobrych praktyk dotyczących zarządzania wiekiem w polskich przedsiębiorstwach – studium przypadku* [Analysis of best practices in age management in Polish companies: A case study], Polish Agency for Enterprise Development (PARP), Warsaw, 2010; *Diagnoza dobrych praktyk – metoda aktywizacji zawodowej osób w wieku 50+* [Best practice diagnosis: Methods for the professional activation of people aged 50+], edited by M. Budny et al., Warsaw, 2013; M. Maksim, P. Pawlak, and G. Czapiewska, *Zarządzanie wiekiem w MŚP* [Age management in SMEs], Toruń, 2012; at www.zysk50plus.pl and in brochures published by the Academy for the Development of Philanthropy in Poland: *Zysk z dojrzałości 2011* [The profits of maturity 2011], *Zarządzanie wiekiem i nie tylko* [Age management and more], *Zarządzanie wiekiem – szansa dla przedsiębiorców. Mini przewodnik zarządzania wiekiem* [Age management as an opportunity for businessmen: An age management mini-manual].

selection, organization of work and work time, training, career and development management, motivation and rewards, health protection and illness prevention, and ending employment.

HR Management in SMEs

The SME sector is characterized by exceptional heterogeneity. It covers microenterprises, as well as both traditional and modern small and medium companies at various stages of development from various sectors operating on local and international markets. These factors strongly influence the practice of HRM and personnel processes (Pocztowski and Pauli, 2013:10; Cardon and Stevens, 2004:299). According to many researchers, leaders of SME companies see the importance of HRM practices differently than leaders of large ones. Moreover, studies show that the rich diversity of SMEs complicates the making of any generalizations (Hill, 2004:23). Yet, regardless the apparent differences, the fundamental characteristics of SME HRM can be distinguished. They include low formalization of HRM practices, concentration of responsibility positions with the entrepreneur, a low level of HRM specialization, and the reactive character of undertaken activities.

A non-formal and flexible way of operating is typical for SMEs (Hill and Stewart, 2000:108). This enables owners to react rapidly to the challenges of turbulent surroundings. The organizational structures of these companies are flat and flexible (Juchnowicz, 2013:53). Flexible forms of work organization are used, which allow for employee transfers within the organization as well as changes in task assignment. Employees are expected to be multitaskers, ready to take up many roles and use many skills (Cardon and Stevens, 2004:311; Coetzer and Perry, 2008:655). A characteristic quality of HRM in SMEs is its weak structuring of roles. Among other things, this is visible in the lack of job descriptions and managerial positions are not distinguished (Strużyna, 2002:127; Karpowicz, 2004:14). As the company grows, specialized positions are created in the field of marketing and personnel management, and managerial posts are created.

A key role in these companies is played by the owner or a manager (Szaban 2007:335). Their knowledge, skills, and awareness determine what actions are taken, where this is often intuitive and tends to be short-run-oriented rather than strategic activities (Pocztowski and Pauli, 2013:12). This is especially visible in microenterprises and small companies.

Another quality is the low level of HRM specialization. This concerns microenterprises and small companies lacking a personnel specialist (Cardon and Stevens, 2004:296). Medium-sized companies feature HRM specialist positions, large com-

panies have departments employing several people (Król, Editor, 2007:22–25). Researchers have noticed that the presence of HR departments or specialists increases the probability of a formalization and professionalization of HR practices (Bacon and Hoque, 2005:1979).

SMEs usually operate with a short-term perspective. They are focused on current business problems. This is also apparent in HRM. Nadin and Cassell argue that HRM in SMEs can be described as a “pick and mix” contingency approach. This means that “the practices selected and the extent to which they were used and formalized was based on a number of characteristics about the SME and the business climate in which they operated. Rather than being driven by long-term strategy, HR use was driven by a pressing issue, itself the result of a strategic decision to focus on current business priorities.” (2007:421).

The HRM Challenges in Age Management in SMEs: Selected Results of Research Carried Out within the Framework of “The Older Worker Activation 50+ Comprehensive Program”

This attempt at exploring HRM challenges in age management in SMEs was based on the results of the following research: “Declared Behavior and Attitudes of Employers towards Employees over 50 Years of Age” (CATI technique, sample size: 1,000) and “Beliefs and Attitudes of Workers over 50 Years of Age Regarding Their Own Life Situation” (CAPI technique, sample size: 751), and “Beliefs and Attitudes of Employers towards Employees over 50 Years of Age” (CATI technique, sample size: 1,000) and “Beliefs and Attitudes of Workers over 50 Years of Age” (CAPI technique, sample size: 401) carried out within the framework of “The Older Worker Activation 50+ Comprehensive Program”—a study conducted by Koźmiński University Human Resource Management faculty members in cooperation with the MB SMG/KRC Research Institute in 2010–2012.³

Three main factors were distinguished on the basis of the desk research: the importance of the role of SMEs in economic development, the specific character of HRM, and age management as a new trend in HRM. This made possible the identification of the following three fields of research: employer attitudes towards an ageing population, the risk of older worker stereotyping, and the willingness to act in a long-term perspective.

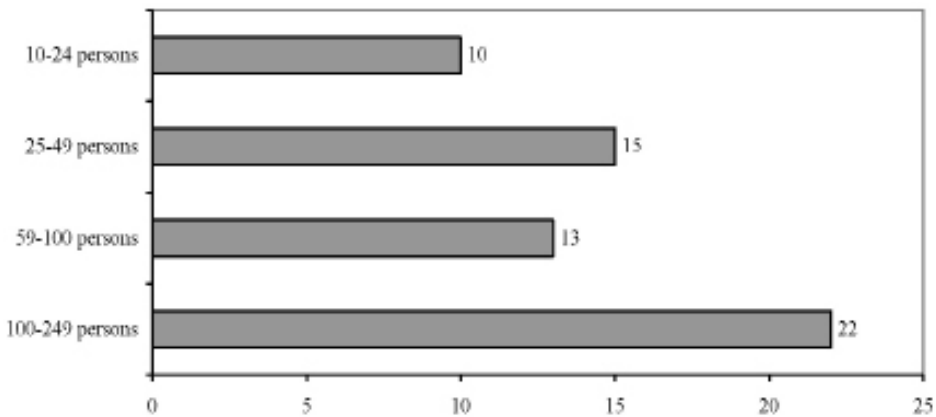
3 The exhaustive results of the study were published in its final report: Szmidt C. (Editor), 2012, “Kompleksowy program aktywizacji osób starszych 50+. Report końcowy” [The older worker activation 50+ comprehensive program: Final report], Warsaw, Koźmiński University and MB SMG/KRC.

Employer Attitudes towards an Ageing Population

Both in Poland and in the EU, SMEs significantly influence the condition of the labor market (Report, 2013:24). A characteristic feature of the Polish labor market is the domination of microenterprises in the SME sector (96.5% of all companies).

As the CATI results show, the average participation of employees 50+ in the number of employed is low, ranging from 22% to 24% (depending on company size). A total of 11% of the investigated companies do not employ people over 50+. More often, such people work in midsized companies and least often in the smallest enterprises. A total of 28% of the companies admitted that age is an important criterion in selection. In more than one out of four companies the application of a 50+ is turned down by definition. Persons over fifty make up only 16% of newly employed. The percentage of newly employed older workers in the largest companies is twice as high as when compared to small companies.

Figure No. 1. The Average Percentage of People over Fifty Years of Age among the Newly Employed (data in %)



Source: Own work on the basis of the results of Koźmiński University and SMG/KRC research.

When identifying the challenges that the SME sector faces in the area of keeping older employees in an organization and employing new ones, it is important to know the opinion of employers on the issue of the professional activation of older people. Employers are aware of the seriousness of the problem of the ageing population as well as the necessity of undertaking measures aimed at professional activation. Almost all (93%) see it as an important issue for Poland.

According to research, it is the government that is primarily responsible for the professional activation of the 50+ (38% – CATI, 56% – CAPI). Other responsible

entities include the older employees themselves, employers, and local public job centers (CATT), and local public job centers, employers, local governments, older people (CAPI). Only 24% (CATT) and 26% (CAPI) point to employers as the responsible party.

While attributing such great responsibility to the government, only 24% of employers give a positive assessment to government activities. A few more employers assess the activities of the local public job centers in a positive way—37%. Employers have high esteem for the activities they undertake themselves (49%).

The results obtained indicate an underestimation of the influence of SME employers on the labor market age structure and the low sense of responsibility for the professional activation of the workers 50+. Employers understand the importance of problems of ageing in society. However, they argue that the government, local public job centers, and the workers themselves bear the greatest responsibility. At the same time they do not assess their own activities highly. Only every fourth employer takes responsibility in this area.

Thus, the challenge here is to take a more responsible attitude towards the problems of ageing in society, which implies the necessity of understanding that age management activities undertaken in the employees' own interest can benefit the collective.

Age as a Dividing Factor in Social Relations in an Organization

The position of older people in society and the myths surrounding them are socially and culturally conditioned. Today, next to gender and race, age is one of the main factors of social division. Parry and Parlamis argue that “age is a primary dimension upon which people categorize and perceive others” (2005:345). Categorization is a cognitive base for stereotypes (Stephan and Stephan, 2007:19).

Below is an evaluation of older and younger employees as carried out by employers. The analysis of the results gives a clear division into these two social groups. Older workers, in comparison with younger ones, are assessed positively by the employers with respect to loyalty, experience, competence, credibility, diligence, involvement, fellowship, and absence of a claiming attitude significantly more often. The differences in loyalty, competence, and diligence are particularly high (perceived as the most important qualities by most employers). A total of 83% of employers point out the loyalty of 50+ employees, 88% indicate competence, and 84% signal diligence. Younger workers are evaluated in these areas at 31%, 34%, and 49%, respectively.

On the other hand, “younger” workers are evaluated as multitaskers (64% vs. 46%), flexible (73% vs. 50%), following organizational changes (82% vs. 44%), physi-

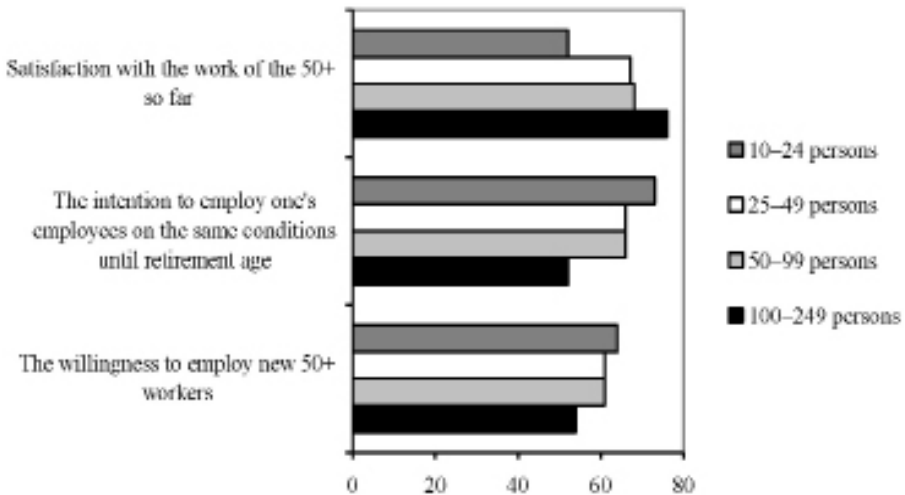
cally fit (94% vs. 47%), eager to learn (84% vs. 33%), adapting to changes easily (84% vs. 27%), and using new technologies (91% vs. 30%) more often than older ones.

This confirms the clear division in the perception of these two groups in an organization. “Younger” employees differ from “older” ones. Such a clear-cut categorization can serve as a basis for a stereotypical approach to older people.

A stereotype, understood as an oversimplified view applying a certain value to people or social groups, can be both of a positive and negative nature (Ng and Feldman, 2012:822). The ageing process triggers changes in personality, character, and behavior. Employers were asked to assess changes such as taking care of appearance, understanding employer interests, working effectively, developing habits that are bad for work, bypassing standards, overestimated self-esteem, a claiming attitude, greater tendency for comprise, and weaker emotional ties. On average, 41% (as opposed to 26% of employers) do not confirm these negative age-related changes in employees.

Research indicates differences in employer attitudes towards older workers already employed and 50+ job applicants. The evidence for this is seen in the statements of employers on satisfaction with the way 50+ employees have been working so far, the intention to continue their employment, and the readiness to employ new workers.

Figure No. 2. Attitudes of Employers towards 50+ Employees (data in %)



Source: Own work on the basis of the results of Koźmiński University and SMG/KRC research.

The results obtained show two tendencies. Employers express more positive attitudes toward 50+ employees already employed than towards the people of this age group trying to receive employment. There are also differences in small and

large employer attitudes. A total of 76% of the smallest employers are satisfied with the previous work of their employees, 73% declare the willingness to employ them subject to the same conditions until retirement. In the largest researched companies, however, only every second employer is satisfied with the work of 50+ employees and is willing to continue their employment. A total of 54% are ready to employ older workers. Entrepreneurs from the largest companies—companies with the highest employability—present the least positive attitudes towards older workers. This should be seen as a negative phenomenon.

For employers, age is a clear dividing factor in an organization. With all certainty, different qualities are attributed to older and younger workers. This can suggest a stereotypical perception of these two social groups and raise doubts as to the fair treatment of older workers. Most of the employers assess older workers in an organization positively, yet only 60% declare a willingness to employ them. This indicates differences in approach towards older workers already employed in the organization and those trying to get a job (“ours” and “strangers”).

The undertaking of activities aimed at reducing the negative impact of age categorization on social relations in organizations is certainly a challenge.

Age Management Practices

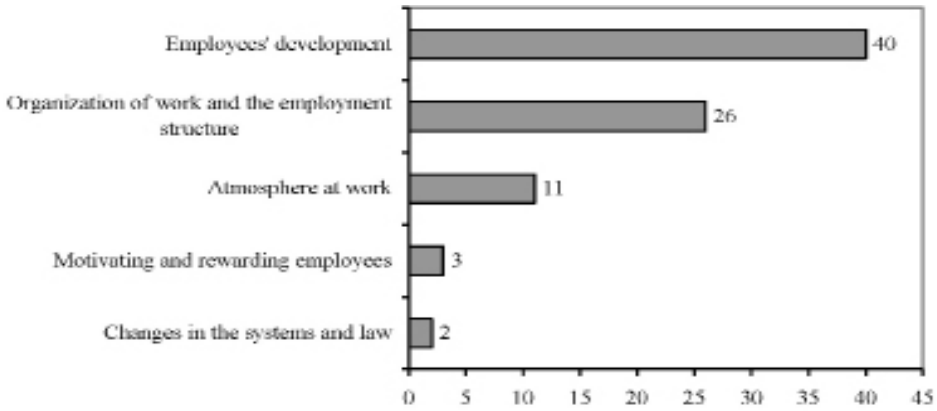
Effectively managed workforce diversity should benefit the organization. Research studies have shown that the numbers and types of HRM practices do affect employment outcomes for minorities—e.g., increased hiring of women and minorities into organization (Ng, 2008:60). Diversity creates good atmosphere for business, it improves the flow of ideas, information, and innovation in the process of work, it facilitates relations with diverse clients and consumers, it helps in following their changing needs, and as a consequence, it stimulates the development of products and services, an openness for new markets, and it improves the business result (Jamka, 2011:265–266, 272). The result of effective age management is good inter-generational cooperation (Jamka, 2009:37).

Research tested familiarity with support programs for the activation of the 50+ and how they are used. More than half the employers (CATI) never heard of any public support. Especially young employers lack this knowledge: 38% of respondents in the 31–40 age group do not know any programs as compared to 45% for all the respondents.

Few employers have ever used these support solutions: 30% disbursed fourteen days of the sick leave, 24% paid a part of the premium, and 10% received co-financing for training. Possibilities for reducing such expenses are known by middle-sized companies significantly more often. Employers between 51 and 60 know more about such amenities.

Less than one-third of respondents know what “age management” means— younger employers significantly less often. As many as 38% of those who know the term were not able to indicate any age management practices. Others listed measures regarding employee development, work organization, and shaping the employment structure most often. Attention to creating atmosphere at work was paid significantly less often. Cases of activities connected with motivating and rewarding employees or introducing legal and systematic solutions were occasional.

Figure No. 3. Awareness of Age Management Practices (data in %)



Source: Own work on the basis of the results of Koźmiński University and SMG/KRC research.

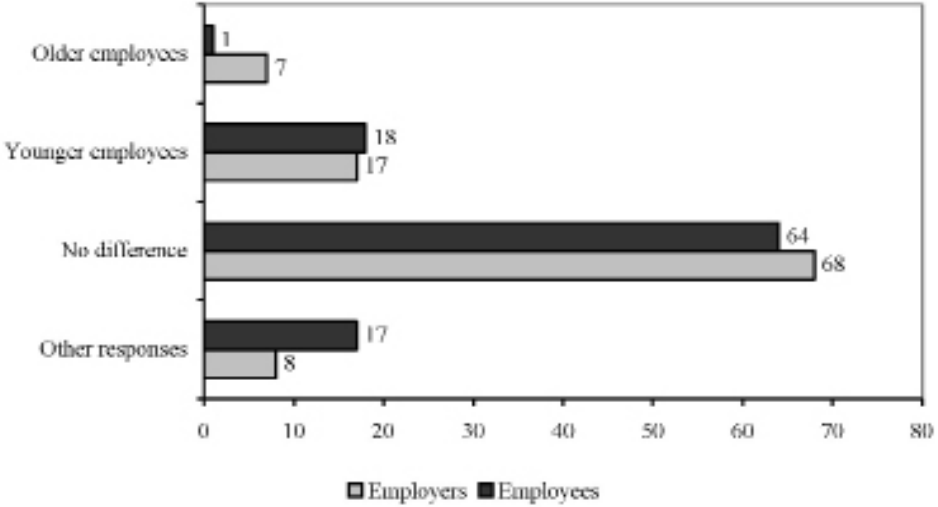
Such low awareness of age management practices can influence actions to keep or to attract 50+ people in companies. Although older workers are more loyal with respect to their employers and resign from work less often when compared to their younger colleagues, one-third of the researched companies faced the resignation of 50+ workers over the past year. The reason for half of the voluntary resignations was the retirement or pension, while 12% received a better job offer from another company.

An important factor for staff retention and attraction is giving employees conditions to develop: ensuring training, assigning ambitious tasks, and promoting. The study examined the interest and access to training among employees of different ages. Less than half of the employers (42%) think that older workers are less interested in the training, 40% do not see the difference in attitudes, and only 16% notice more interest from the older workers.

Employers declare that they enable older worker participation in training. In most of the companies, the 50+ workers are sent for training as often as younger workers. In a few they receive training less often and occasionally more often.

The biggest group of 50+ employees does not see any difference in access to training for younger and older employees, either. They see more opportunities to train for older than for younger workers far less often.

Figure No. 4. Participation in Training by Older Workers as Perceived by Employers and 50+ Employees (data in %)



Source: Own work on the basis of the results of Koźmiński University and SMG/KRC research.

Declarations regarding training opportunities for the older people do not mean that they actually take part in training. Among respondents aged 50+, only 16% admitted that they had taken part in training in the last three years and less than one-third expects to be given such opportunities in the future.

Most of the 50+ workers do not see differences in the distribution of ambitious tasks and new projects or in the promotion of younger or older employees. Among the remaining respondents, most dominant is the group that is convinced that younger workers have more privileges in these areas (20% and 22%, respectively, point to the younger, while 7% and 3% percent to the older). Thus, every fifth respondent notices unfair treatment of his or her age group. This does not facilitate the maintaining or attracting of older people in and to SME enterprises.

For a company to be able to benefit from diversity, it helps to build an organizational culture of cooperation and knowledge sharing. This study shows that almost all employers (95%, CATI research) assess cooperation between younger and older highly. Conflicts between people of different ages are rare (only in 26% of the companies – CATI research, 8% – CAPI research). At the same time, most employers

(68%, CAPI research) think that it is better for companies to have teams of people of various ages than of the same age.

In the examined companies (CAPI), older workers are more willing to share their knowledge than younger ones. A total of 62% of employers notice their willingness to share knowledge with other people of different age, and 66% see their willingness to share with people of the same age. Opinions regarding younger workers are more critical (55% and 58% of employers, respectively). Thus, it is the younger staff that blocks access to knowledge from the older staff rather than older workers keeping their knowledge to themselves. The researched employers do not appreciate diversity and do not see the benefits it can bring. Most of them do not know the programs established for the activation of 50+ people and do not use them or they are not familiar with age management practices. As a result, only a few companies undertake specific measures in this respect.

Despite the declarations of most employers and employees regarding equal opportunities for the development of people of different age, only 16% of the researched 50+ workers had taken part in training over the past three years. Some companies do not provide equal chances for development and promotion for the workers of various age.

The investigated companies give cooperation between younger and older employees a positive evaluation, at the same time noticing a greater willingness to share knowledge among older workers.

Appreciating staff diversity is a challenge for employers from the SME sector. One way to achieve it is to undertake and expand age management practices. Rather than being focused on current business priorities, SMEs should adopt a long-term strategy.

Conclusions

Enterprises from the SME sector, which employ over 70% of all working people, influence the age structure of the labor market significantly.

The goal of this paper was the identification of HRM challenges in age management in SMEs. Three main challenges were found: to take a more responsible attitude towards the ageing problems in the society and understanding that age management activities undertaken for the own interests of employees can benefit the collective, to undertake activities aimed at reducing the negative impact of age categorization on social relations in organizations, and to expand age management practices by adopting a long-term strategy. Taking up actions in response to these challenges can have a fundamental effect on solving problems stemming from the ageing population.

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Wyzwania w zarządzaniu wiekiem w małych i średnich przedsiębiorstwach

Streszczenie

„Wyzwaniem dla współczesnych społeczeństw jest rekonceptualizacja pojęć wieku i pracy oraz zmiana postaw zakorzenionych w relacjach społecznych” (Parry, Tyson, 2011, s. 1). Artykuł pokazuje wyzwania stojące przed przedsiębiorcami z sektora małych i średnich przedsiębiorstw (MŚP) w obszarze zarządzania wiekiem.

W części pierwszej autorki koncentrują się na problematyce zarządzania wiekiem w organizacjach, które odnosi się do kompleksowego procesu zarządzania służącego

rozwojowi środowiska przyjaznego starszym pracownikom. W drugiej części omówiono specyfikę zarządzania ludźmi w małych i średnich przedsiębiorstwach. Ostatnia, zasadnicza część artykułu jest próbą eksploracji wyzwań związanych z zarządzaniem wiekiem w MŚP.

Zaprezentowano w nim wybrane wyniki badań przeprowadzonych w MŚP przez pracowników Katedry ZZL Akademii Leona Koźmińskiego we współpracy z Instytutem Badań MB SMG/ KRC.

Wyniki wskazują, że wyzwaniami dla przedsiębiorców z sektora MŚP w obszarze zarządzaniu wiekiem są: przyjmowanie bardziej odpowiedzialnej postawy wobec problemów starzenia się społeczeństwa ze świadomością, że działania w obszarze zarządzania wiekiem, podejmowane przez pracodawców we własnym interesie mogą przynieść korzyść ogółowi; podejmowanie działań mających na celu niwelowanie negatywnego wpływu procesów kategoryzacji ze względu na wiek na relacje społeczne w organizacji; rozszerzanie praktyk zarządzania wiekiem, ujmowanych w długoterminowej perspektywie.

Słowa kluczowe: zarządzanie zasobami ludzkimi w małych i średnich przedsiębiorstwach, zarządzanie różnorodnością, praktyki zarządzania wiekiem

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