

## An exploration of older worker flexible working arrangements in smaller firms

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*This article explores flexible working arrangements (FWAs) for older workers in smaller UK firms. We address three questions: how far older workers need and value FWAs, the type of FWAs they need, and whether smaller firms can offer these FWAs. We draw on 46 semi-structured interviews from six smaller case study firms to present a qualitative exploration of both owner-manager and (under-researched) worker perspectives. We evidence the offer and importance of temporal and work-role FWAs, together with the use of i-deals and ad hoc FWAs in meeting the needs of this diverse group. We make three contributions: first, theoretically, in arguing for an extended definition of FWAs and understanding formality of offer; second, to practice, in highlighting FWA mechanisms appropriate to older workers; third, to policy, in questioning the effectiveness of both the business case approach to older worker FWAs in smaller firms and policy's positioning of older workers as a homogeneous group.*

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### INTRODUCTION

In common with many developed countries, the UK population is ageing rapidly. Declining labour market participation by the over 50s (Loretto and White, 2006), together with fewer younger workers entering the labour market, raises the spectre of labour shortages. These shortages, coupled with expensive pension provision (Zientara, 2009), make imperative the labour market retention of older workers (Riach, 2009). In the UK, age discrimination legislation reinforces government policy promoting a business case for older worker employment whereby employers can attract and retain valuable skills (DWP, 2007, 2011). A discourse of productive ageing (Simpson *et al.*, 2012) thus seeks to change attitudes to older workers and exhorts supportive working practices (Loretto and White, 2006). Accommodating older workers may, however, require radical changes to HR practice (Coupland *et al.*, 2008). Here we consider flexible working arrangements (FWAs) designed for worker benefit that aim to support workers in reconciling work with other aspects of their lives (Dickens, 2006). There is growing recognition that such FWAs may support extension of working lives (CIPD, 2012; Loretto *et al.*, 2009), yet little is known about how far older workers need and value FWAs (Shacklock *et al.*, 2009). Many FWAs focus on the needs of groups such as working parents (Gardiner *et al.*, 2007), and alternative arrangements may be required for older workers (Hirsch, 2007; Buyens *et al.*, 2009). However, research demonstrates a lack of employer awareness of, or response to, demographic trends (Fuertes *et al.*, 2013) and typically short-term, ad hoc employer approaches to older worker employment (Loretto and White, 2006; CIPD, 2012).

This article explores the role of FWAs in supporting older workers in smaller UK firms to remain in employment, contributing to 'more sustainable working lives' (Hirsch, 2007: 105, emphasis in original). We address three questions: how far older workers need and value

FWAs, the type of FWAs they need, and whether smaller firms can offer these FWAs. We draw on six case study firms to present a qualitative exploration of both owner-manager and (under-researched) worker perspectives on older worker FWAs. We make three contributions: first, theoretically, arguing for an extended definition of FWA and developing understanding of formality of its offer; second, to practice, highlighting FWAs appropriate to this group; third, to policy, questioning the effectiveness of both the business case approach to older worker FWAs in smaller firms and its consideration of older workers as a homogeneous group.

### RESEARCH CONTEXT: SMALLER FIRMS AND OLDER WORKERS

Smaller firms employ nearly 60 per cent of private sector workers (FSB, 2012). Context-specific research is important as smaller firms are not 'small big firms' (Welsh and White, 1981), and application of large firm HR practice may not be effective (Doherty and Norton, 2014). Reactive approaches often prevail (Cassell *et al.*, 2002), especially in the absence of HR specialists and formal HR policies (Dex and Scheibl, 2001). HR practice is determined by a complex interplay of external structural factors and internal dynamics, including resource constraints and managerial influence (Harney and Dundon, 2006). Employment relations often thus constitute 'negotiated orders' reliant upon cooperation and bargaining (Ram, 1994), and mutuality and adjustment dominate (Edwards and Ram, 2006). This may create the supportive climate important to effective HR practice (Rondeau and Wagar, 2001) and help accommodate older worker needs, particularly in relation to FWAs. Yet little is known about how FWAs operate for this group in smaller firms (Fuertes *et al.*, 2013).

We define older workers as aged 50 plus (Loretto and White, 2006; Shacklock *et al.*, 2009). Since the 1970s, UK labour market participation has declined markedly from this age (Smeaton and Vegeris, 2009). Two main factors account for this: first, organisational practice has encouraged older workers' early labour market exit (Arrowsmith and McGoldrick, 1997); second, institutionalised ageism has perpetuated discrimination and reduced employment opportunities (Loretto and White, 2006). Recently, however, the UK government has addressed this decline, promoting a productive ageing discourse (Simpson *et al.*, 2012) and working life extension (DWP, 2011). This is underpinned by age discrimination legislation (Urwin, 2006) and a 'business case' for employing older workers (DWP, 2011). The business case argues employers can address skill shortages by recruiting from a wider talent pool and reducing turnover to retain vital experience. This is important for smaller firms as older workers are often marginalised and overrepresented in the low-wage economy where smaller firms dominate (Edwards and Ram, 2006). They constitute an important labour source, and FWAs are likely to assist their recruitment and retention (DWP, 2007).

### FLEXIBLE WORKING

In this section, we define FWAs and consider the formality of their offer, drawing out smaller firm implications. We also discuss types of FWAs in relation to older workers. Early FWAs privileged employer need, underpinning labour cost-reduction strategies for addressing fluctuations in economic or business cycles (Stavrou and Kilaniotis, 2010). FWAs included, for example, functional flexibility, in which workers developed a range of skills to facilitate job rotation, and numerical flexibility, non-standard working patterns often associated with job and income insecurity. In tight labour markets, however, different forms of FWAs emerged, initially termed family-friendly (Thomas, 2000) or work-life balance practices (Dickens, 2006). These were offered for worker benefit as part of a strategic approach to recruitment and retention

(Maxwell *et al.*, 2007). Which FWAs benefit whom can be a contested terrain (Stavrou and Kilaniotis, 2010). Broadly, FWAs for employer benefit are less worker-friendly, *e.g.* zero-hour contracts, while those for worker benefit support the reconciliation of work and other commitments, *e.g.* job share and term-time only arrangements. Some FWAs may also address a coincidence of employer and worker need, *e.g.* part-time working (Thomas, 2000) and functional flexibility (Dex and Scheibl, 2001). Here, as is commonly done (Stavrou and Kilaniotis, 2010), we consider only FWAs that are explicitly offered for worker benefit and support (re-)arrangement of working time or patterns. This fits an exploration of FWAs that support extension of working lives.

Maxwell *et al.* (2007: 138) suggest FWAs for worker benefit comprise 'any policies and practices, formal or informal, which permit people to vary when and where work is carried out'. This combines type of FWAs with formality of their offer, one of the few definitions to consider the nature of formality, and we develop this definition below. In the UK, the impetus for FWA provision rests primarily on a business case (Hyman and Summers, 2004), supported by legislative rights (Maxwell *et al.*, 2007). Until 2014, these rights were restricted to those with caring responsibilities and did not apply to older workers when our fieldwork was conducted. Policy additionally strongly promotes a business case for offering older worker FWAs (Riach, 2009) to sustain both the capacity (Kooij *et al.*, 2010) and the motivation to remain in employment (Kooij *et al.*, 2008). Most FWA research, however, focuses on the needs of working parents (Gardiner *et al.*, 2007), and there is limited understanding of how this general HR practice might apply more specifically to older workers (Kooij *et al.*, 2013). Further complexity arises as older workers are not a homogeneous group, differentiated by gender, skills and education, work history, domestic circumstance, health, and location (Loretto *et al.*, 2009). Exploration of FWAs for this group is thus needed, particularly in the smaller firm context where there are some general studies (*e.g.* Dex and Scheibl, 2001; Maxwell *et al.*, 2007) but none specific to older workers (Fuertes *et al.*, 2013).

### **Formality of offer**

As Maxwell *et al.* (2007) note, FWAs can be offered on a formal or informal basis. Formality is under-researched and we explore it in detail here, arguing that the smaller firm context will inevitably influence the nature of formality's offer. Formal FWAs engender permanent change to working patterns and are generally presented as strategic and policy-based, (*e.g.* DWP, 2011). Accordingly, Vickerstaff (2003) argues that their offer will be demand-led to support employer recruitment and retention priorities. Some larger firms have indeed grasped this business case, introducing policy-based FWAs for older workers. Asda, for example, offers 'seasonal leave', and Centrica, British Gas, Marks and Spencer, and McDonalds all promote sophisticated older worker FWAs (DWP, 2011). There is, however, limited evidence of policy-based FWAs (Loretto *et al.*, 2009; Shacklock *et al.*, 2009), particularly in smaller firms which, as we note above, tend to be reactive (Cassell *et al.*, 2002) and rely on informal HR practice (Fuertes *et al.*, 2013). Their focus is typically legislative compliance rather than a business-case use of HR practice (Doherty and Norton, 2014). In practice, formal FWAs are often idiosyncratic; in the absence of policy, permanent change to working patterns is negotiated through relational means by particular workers with the capacity to do so (Dickens, 2006). There is currently limited consideration of this distinction, and we use the concept of i-deals (Rousseau *et al.*, 2006) to develop understanding. 'I-deals' are:

"voluntary, personalized agreements of a non-standard nature negotiated between individual employees and their employers regarding terms that benefit each party. These individualized employment arrangements differ, to some extent, from those

of the employees' coworkers . . . predicated on an individual worker's value to his or her employer" (Rousseau *et al.*, 2006: 978).

I-deals create permanent contractual change and may comprise individualised FWAs within an otherwise standard set of terms and conditions (Rousseau *et al.*, 2006). They may particularly suit smaller firms given the negotiated nature of social relations and their capacity to idiosyncratically respond to older worker need for FWAs. Operations rest heavily on relationships and are pragmatic (Dex and Scheibl, 2001), and evidence suggests that the skills and experience of older workers are valued in smaller firms (Hewitt, 2009) creating space for i-deals. Lack of policy does not, therefore, necessarily indicate lack of FWAs (Dex and Scheibl, 2001), and i-deals may offer smaller firms an effective means to respond to the diverse needs and preferences (Kooij *et al.*, 2010) of the heterogeneous older worker group (Loretto and White, 2006).

In contrast, informal FWAs provide ad hoc, temporary variations in working patterns (Fuentes *et al.*, 2013). Such arrangements are again idiosyncratic and relational but temporary, based on individual negotiation, and not enshrined in the formal employment contract and with no permanent commitment by either employer or worker. This may again play to smaller firm strengths of informality and mutual accommodation, responding to older worker needs for flexibility on an ongoing and individualised basis (Boxall, 2013). We sound, however, a note of caution. While idiosyncratic approaches, both formal and informal, may play to such strengths in responding to older workers' need for FWAs, lack of transparent policy may also permit managers to resist worker-oriented FWAs and detract from worker awareness of their options (Maxwell *et al.*, 2007). Rousseau *et al.* (2006), for example, recognise the potential for favouritism, certain employees may be overlooked (Mayson and Barrett, 2006), and discrimination against older workers could be more likely (Loretto and White, 2006). In Table 1, we summarise the three types of FWA offer discussed here. We also outline FWA type with some example practices, and turn now to consider these.

**Type of FWA**

Maxwell *et al.* (2007) suggest that FWAs permit workers to vary when and where work is conducted, reflecting the typical emphasis on temporal and spatial FWAs (Dex and Scheibl,

**TABLE 1** *Formality of offer and flexible working arrangement (FWA) type*

FWA offer	Policy-based	I-deal	Ad hoc
	Basis: strategic, formal	Basis: relational, formal	Basis: relational, informal
	Available to all workers covered by FWA policy	No FWA policy, individually negotiated as i-deals	Individually negotiated arrangements
	Permanent arrangement	Permanent arrangement	Temporary arrangement
FWA type	Example practices		
Temporal	Part-time	Part-time	Arriving late/departing early on specific occasions
FWA	Job share	Job share	
	Compressed working week	Compressed working week	
	Annualised hours		
Spatial	Homeworking	Homeworking	Homeworking on specific occasions
FWA	Teleworking	Teleworking	
Work-role	Released from specific tasks	Released from specific tasks	Little in current literature
FWA	Less demanding responsibilities	Less demanding responsibilities	

2001; Loretto *et al.*, 2005). Temporal FWAs offer variation in how long people work (number of hours) and/or when people work (arrangement of hours), typically comprising practices such as part-time and term-time working, job sharing, compressed hours, and flexitime. Spatial FWAs offer variation in work location and include practices such as homeworking and teleworking (Dex and Scheibl, 2001). These practices typically cater for the needs of working parents (Gardiner *et al.*, 2007), although there is growing evidence of the importance of temporal FWAs to older workers (Loretto *et al.*, 2009). Zientara (2009), for example, found positive associations between part-time work and delayed retirement, and many retirees indicate that they would have worked longer if offered temporal FWAs (Shacklock *et al.*, 2009). Indeed, many older workers express a preference to remain with their existing employer and downscale their working commitments (EOC, 2005; ONS, 2012). This reflects wider patterns where FWA emphasis is on part-time working (Loretto *et al.*, 2005), typically for women (Smeaton and Vegeris, 2009). However, the heterogeneous older worker group (Loretto *et al.*, 2009) may call for alternative forms of FWAs. Buyens *et al.* (2009), for example, argue that the cessation of shift or overtime working or extra holidays are important for older workers. Current research, while limited, relates to temporal FWAs, and we are not aware of any that relates to spatial FWAs for older workers, although these may be attractive to them.

We argue here for FWA's definition to be extended beyond temporal and spatial FWAs to include work-role FWAs (Rosenblatt and Batia, 1999). While work-role FWAs are emerging in older worker research (*e.g.* Buyens *et al.*, 2009, who present examples but do not use the term), they have not yet appeared in FWA literature. Yet, as we explain in the Methods section, work-role FWAs for older workers were prominent in our data. Practices may include, for example, role variation to reduce physical strain (Hirsch, 2007), change in responsibilities (Buyens *et al.*, 2009) and/or reduced workload (Remery *et al.*, 2003). Work-role FWAs may involve occupational mobility whether downwards (in taking up a more junior or less demanding role, Smeaton and Vegeris, 2009) or otherwise (*e.g.* mentoring younger colleagues, Tikkanen *et al.*, 2002), and thus facilitate adjustment to retirement (Simpson *et al.*, 2012). 'Bridge employment' may also be required where older workers are forced to move organisations to obtain a more suitable role (Loretto *et al.*, 2005). There is little consideration of these practices in current FWA literature, and we develop their consideration in our findings.

Table 1 outlines FWA type and example practices. While current research is limited, we suggest that many formal FWAs are premised on similar practices, *e.g.* part-time working, but arrived at in different ways, *i.e.* either policy or *i-deals*. Informal FWAs are less standardised and reflect individual needs, although little is known about ad hoc work-role FWAs. We note that, while FWAs are presented as benefiting workers, they are not entirely unproblematic. For example, reduction in working hours can lead to work intensification (Dex and Scheibl, 2001), and downward occupational mobility can discourage workers (Jorgensen and Taylor, 2008). Additionally, FWAs can be costly and unpopular with employers (Dickens, 2006). We explore these issues in our findings.

To summarise, despite some development of older worker FWAs in larger firms, such flexibility is little understood (Fuertes *et al.*, 2013) and under-researched in smaller firms (Shacklock *et al.*, 2009), and its scope to extend working lives may not be realised (Phillipson, 2007). We explore this in six case study firms, addressing three research questions: how far older workers need and value FWAs, what type of FWAs they need, and whether smaller firms can offer these FWAs.

## METHODS

We report the findings of a project<sup>1</sup> that investigated FWAs for older workers in smaller UK firms. We collected data in six case study firms based in the North West of England from a variety of sectors (Table 2). Although we aimed to include a range of sectors for comparative purposes, selection was relatively opportunistic as we negotiated access both through personal networks and unsolicited approaches to firms identified as meeting our criteria in relation to size and workforce profile. We defined size in terms of both worker numbers and ownership (Bolton, 1971), targeting those employing fewer than 100 workers and being owner-managed. Owner management was important as worker numbers alone did not support exploration of managerial influence on FWAs. We use the term 'smaller' as the firms employ 10–60 workers, rather than the 1–50 workers, which typically constitute small firms (EU, 2011). In terms of workforce profile, we selected firms with diverse age profiles but employing at least five workers over 50 to inform meaningful discussion.

We conducted 46 semi-structured interviews lasting between 45 and 70 minutes. In each firm, we interviewed both owner-manager *and* workers to move beyond the typical privileging of managerial evidence and incorporate worker perceptions of HR practice (Nishii *et al.*, 2008). The owner-managers introduced their firms and explained any FWA policies and practices, both general and those specifically aimed at older workers. We then interviewed older workers, to surface their neglected perspective (Loretto *et al.*, 2009; Fuertes *et al.*, 2013), and some of their younger colleagues, developing a broader view of the questions associated with older worker FWAs (DWP, 2011). All participants discussed the existence and availability of FWAs and to whom they were offered. We gave examples, if required, of FWAs noted in extant research. Participants were also encouraged to consider the specific FWA needs of older workers. Our expectation was that examples would relate to temporal and spatial FWAs. Temporal FWAs were evidenced, although examples of spatial FWAs were limited to one firm. Work-role FWAs, however, emerged as important, especially in response to questions of whether older workers required particular types of FWAs. We also asked how workers accessed FWAs and inferred level of formality from examples given, *e.g.* policy-based, *i-deal* or *ad hoc*. Our sample and approach elicited valuable narratives of working flexibly when older (Riach, 2009).

The interviews were recorded, transcribed and analysed in NVivo 9 (QSR International, Doncaster, Victoria, Australia). First-order coding related to FWAs. Our initial codebook comprised existing FWA types, *i.e.* spatial and temporal flexibility, to which we added work-role flexibility. Each was then subdivided into policy-based, *i-deal* and *ad hoc*. Our second-order coding then overlaid consideration of older workers and smaller firms, and supported development of conceptual relationships between these categories. We recognise our study's limitations in that it is small in scale and comprises volunteer firms. Further, the participating firms are diverse in terms of worker numbers, with three employing between 10 and 20 workers, and three employing between 50 and 60, which might influence response patterns. Finally, our study is specific to the UK context. We do not, however, claim representativeness for our findings. Rather, we seek to present rich insights into FWAs sought or enjoyed by older workers and the lived realities of this in smaller firms.

## FINDINGS

We first provide a general overview of the reasons for and approach to FWA provision, and then explore in detail FWAs and their operation for older workers. The FWA offer was rarely

**TABLE 2** Characteristics of participant firms, respondents and flexible working arrangement (FWA) offer/type

Firm name	Total workers (total interviews)	Description of firm	Age profile of workforce	Respondent characteristics Job title, age (gender)	Formality of FWA offer	FWA type and example practices
GPSurgery	23 (10)	General practice (GP) offering health-care services; two GP partners; three employed GPs; workers include nurses and administrative staff; many have long service	Approx. a third of the workforce between 50 and 60 One aged 62	GP: 48 (M) Practice manager: 51 (F) Receptionists: 56 (F), 59 (F), 62 (F) Administrators: 49 (F), 58 (M), 60 (F) Domestic: 55 (F) Practice nurse: 40 (F)	Policy-based: FWA policy exists but limited worker awareness I-deals Ad hoc	<i>I-deals</i> Temporal: three workers aged 50-60 (all F) reduced 4-day weeks in the same role Temporal/role: worker (62, F) took demotion and reduced working hours at 60 <i>Ad hoc</i> Role: temporary rearrangement of tasks for worker (50plus, F) following hip replacement
InsCo	50 (6)	Insurance firm offering niche products to high net-worth individuals; two owner-managers; workers split across professional/technical and administrative roles; many have long service	Wide age range Several workers aged 50-60 One aged 64	Director: 37 (M) Broker/claims handler: 24 (F), 50 (F), 59 (M) Administrators: 59 (F), 63 (F)	No policy I-deals Ad hoc	<i>I-deals</i> Temporal: worker (63, F) working a 4-day week <i>Ad hoc</i> Temporal: temporary variation in working and leave arrangements to support elder care responsibilities for worker (63, M)
CarCo1	22 (9)	Car sales and servicing (high value cars); one owner-manager; workers across sales/maintenance and administrative roles; many have long service	Ages from 21 to 62 Several aged over 50 One aged 62	Directors: 45 (F), 53 (M) Car sales/maintenance: 45 (M), 46 (M), 52 (M), 56 (M) Administrators: 27 (M), 50 (F), 53 (F)	No policy I-deals Ad hoc	<i>I-deals</i> Role: Two workers (52,M; 56,M) downshifted to CarCo from more demanding roles (both full-time) <i>Ad hoc</i> Role: Worker (62,M) is accommodated in managing a physical role
GiftCo	60 (10)	Firm selling long service award gifts to employers; one owner-manager; workers across buying/marketing and administrative roles	Three aged over 60 Approx. 10 aged over 50	Operations/HR director: 61 (M) Buying/marketing: 26 (M), 30 (F), 31 (F), 33 (F), 60 (M) Administrators: 34 (F), 45 (F), 47 (F), 58 (F)	Policy-based: FWA policy exists but limited worker awareness I-deals	Temporal: flexitime system <i>I-deals</i> All temporal: One worker (61, M) reducing to a 3-day week Owner-manager's mother-in-law (63, F) works flexibly Worker (58, F) told she can work as long as suits her on flexible terms (currently full-time)

TABLE 2 Continued

Firm name	Total workers (total interviews)	Description of firm	Age profile of workforce	Respondent characteristics Job title, age (gender)	Formality of FWA offer	FWA type and example practices
TransportCo	48 (6)	Courier firm providing a national parcel delivery service; two owner-managers; workers across sales/logistics, driving and administrative roles	Over half workforce aged over 50 Several workers aged over 60 Two aged over 65	Owner-manager: 52 (F) Sales/logistics: 29 (M), 40 (F), 41 (F), 61 (F) Administrators: 55 (F)	No policy I-deals Ad hoc	<i>I-deals</i> Spatial: home-based working Temporal: casual shifts/zero-hour contract arrangements to accommodate (in part) older worker needs Temporal: job share (55, F; 61, F) Temporal/role: one retired worker (75, M, formerly in a senior role) now a part-time driver's mate <i>Ad hoc</i> Temporal: one-month leave granted to worker (64, M) to visit grandchildren overseas Role: Informal arrangements to ensure older workers do not have to do heavy lifting on deliveries
CarCo2	10 (50)	Car sales and servicing company; one owner-manager; workers across sales/servicing and administrative roles; some have long service	Over half of workforce is aged over 50 Four aged over 60	Owner-manager: 57 (M) Sales/servicing: 45 (M), 59 (M), 60 (M) Administrator: 28 (F)	No policy I-deals	<i>I-deals</i> Temporal: one worker (60, F) working part-time to care for grandchild Temporal/role: two workers (55, M; 60, M) downshifted to CarCo2 from more senior roles elsewhere; both work part-time Role: adjustment in duties for one worker (59, M) with physical job

strategic or policy-based as might be expected in smaller firms (Mayson and Barrett, 2006). Managerial prerogative dominated (Harney and Dundon, 2006), typically exercised in a reactive manner (Cassell *et al.*, 2002). Owner-managers used a relational discourse of 'looking after' older workers, for example, CarCo2's owner-manager's views were widely reflected when he equated his firm to 'a family, a little club'. The influence of external structural factors (Harney and Dundon, 2006), here changing labour market demographics, was not explicitly recognised. Owner-managers eschewed policy's strategic logic of FWA supporting recruitment and retention (DWP, 2011). As we outline below, FWAs were used only opportunistically in recruitment. While their role in retention was implicit, this was again based within a discourse of addressing worker need:

"We have got . . . staff who have been with the business nearly thirty years. Now we keep talking to those people in terms of are their requirements changing both physically and also in terms of their expectations . . . Not in such a way that we are talking about discriminatory issues. But in terms of trying to be accommodating from their own personal requirements and how the business can adapt and accommodate to what it is they are looking to do" (Director, 45, CarCo1).

FWA's offer thus emerged from social relations based on interdependency and mutuality (Ram, 1994). Only two firms had FWA policies. GiftCo's owner-manager introduced a policy when bowing to pressure for a formal flexitime system. It was, however, allied to a clocking-in system that workers construed as exemplifying distrust, somewhat undermining social relations. GPSurgery's practice manager was studying HR and had professionalised some HR practice. Both firms' policies addressed only temporal FWAs and were narrowly applied to workers having specific rights to request FWAs under the UK law (*i.e.* not older workers at that time). The owner-managers believed their workers understood policy, but workers suggested low awareness (as per Maxwell *et al.*, 2007), and it had little impact on practice. GiftCo's owner-manager alone demonstrated some resistance to FWAs, the others being generally supportive.

Given the lack of policy, our findings focus on *i-deal* and *ad hoc* FWAs, and comprise both temporal and work-role FWAs. Only one example of spatial FWAs emerged (TransportCo), which does not allow us to explore this in any depth. We report both owner-manager and worker perspectives, and the heterogeneity of the older worker group emerges clearly from our data in terms of gender, skills, work history and domestic circumstances (Loretto *et al.*, 2009).

### **Temporal FWA**

Absence of policy did not preclude temporal FWAs (Dex and Scheibl, 2001). *I-deal* FWAs, comprising permanent contractual variations, and *ad hoc* FWAs, the negotiation of temporary FWAs for particular reasons, were evidenced. *I-deal* FWAs were situated in individualised employment situations, with managers illustrating their approach with specific examples:

"I've had one person recently . . . he's . . . 62 now and is still twisting spanners and he's getting tired and he said 'Is there any way I could work so that instead of working five days [I] work four days' and . . . I'm prepared to look it" (Director, M, 53, CarCo1).

Rather than a commitment to FWAs *per se*, it was presented as a mechanism to accommodate a valued worker.

Most frequently, older workers adjusted working hours in their current role through individualised negotiations with the owner-manager or director. As one said, "we just ask [owner-manager]". These *i-deals* created responsiveness to individual worker need:

“My job’s been very flexible, I used to work 9am while 3pm, and then I worked until 4pm and then when I dropped Friday’s I worked until 5pm. Then I thought ‘it’s too long a day’ so I dropped it down to four” (Administrator2, F, 63, InsCo).

I-deal FWAs were widely apparent. For example, a CarCo2 administrator (F, 60) worked part-time to care for her grandchild, and a number of (female) older workers at GPSurgery had also shifted to part-time working. These adjustments were important in sustaining their working lives. However, in nearly all cases, these i-deals were offered to older *female* workers (Smeaton and Vegeris, 2009). I-deals thus raised the spectre of gender discrimination (Loretto *et al.*, 2009) especially at more senior levels. For example, at GiftCo, reduced working hours were only reluctantly afforded to the older male operations director (M, 61) who could no longer:

“sustain the energy that’s required. Because as a leader you have to have so much energy to come up with things and push people all the time . . . And I find that extremely draining. So I need more time to be able to recharge my batteries because otherwise I’ll come in on Monday morning and I’m still run out really, I haven’t got the energy for the next week . . . He’s [MD] exasperated because I’m now putting him in a position which means he’s got to think of something, some change . . . because I’m saying I need to go on 3 days a week, he thinks this is the start of the end really and he’s going to have to change, something is going to have to happen”.

The gendered nature of i-deal temporal FWAs reflects patterns across larger firms (Smeaton and Vegeris, 2009). Ad hoc temporal FWAs, however, addressed a greater diversity of need. Older worker examples included an InsCo worker (M, 63) with elder care responsibilities, who was allowed a longer lunch break when his parents were in a hospice, and later paid time off for their funerals and counselling. At TransportCo, an older worker (M, 64) negotiated a month’s block leave to visit his grandchildren overseas. Both these older workers are male and in neither case do FWAs accommodate routine caring responsibilities. Indeed, the second example demonstrates the role of FWA in supporting older workers’ lifestyle choices, something widely echoed among our participants.

Temporal FWAs for older workers thus operated on both i-deal and ad hoc bases, subject to management prerogative and nested within both social relations and a coincidence of need. For example, TransportCo employed a relatively large proportion of older workers using temporal FWAs, which supported its responsiveness to changing delivery patterns. Awareness of management’s openness to older workers was generated simply by their relatively high visibility. Workers suggested that FWA’s offer was driven more by performance than situational factors, such as age, explaining that ‘as long as you work hard and they [management] know that you work hard they are quite flexible’ (M, 26, GiftCo). I-deals, however, meant that FWAs could be restricted to certain workers rather than being generally available, for example:

“I don’t think it’s something [flexibility] they’d actively encourage. *But I think probably once you’re established and they know what sort of a person you are*, what sort of an employee you are, then – it’s always been [offered to] people . . . that are well established . . . I think once you’ve got an employee that you like . . . and he knows the job why risk losing them for the sake of not – a bit of give and take really” (Administrator, F, 58, GiftCo).

I-deals may also reduce awareness of FWA options and uptake as these were not set out in any policy document:

“I’ve not really thought about it because as I say, I just take it as it is at the moment. Probably when I get to sixty and my daughter, if she has a baby or something, I might decide to go part-time. I don’t really know yet” (Receptionist2, F, 56, GPSurgery).

To summarise, older workers appeared to both need and value temporal FWAs. I-deals in our sample broadly mirrored the temporal FWA offer to the wider workforce, with an emphasis on (gendered) part-time working, whereas the other types of FWAs were tailored to the more diverse needs of older workers. There were no particular patterns across the firms as FWAs reflected owner-manager prerogative and were individualised to address the varied needs of older workers. FWA’s offer was underpinned by a relational desire to support (certain) older workers rather than to strategically address labour market pressures. Consequently, there was limited resistance to FWAs and no discussion of associated cost pressures. Idiosyncratic approaches may, however, occasion gender discrimination and lack of awareness of FWA options, especially for older workers at risk of labour market exit.

### **Work-role FWA**

In our data, work-role FWAs via i-deals were evidenced in two ways: first, agreement of permanent, explicit adjustments with the current employer, usually to a less demanding role, which we characterise as downward occupational mobility (Smeaton and Vegeris, 2009); and second, change of employer to take up a less demanding role, characterised here as bridge employment (Loretto *et al.*, 2005). Ad hoc FWAs derived from tacit adjustments within the same role. While research suggests that employers may resist work-role FWAs (Beck, 2013), we found many examples of its operation. These were again relational rather than strategic, and cost pressures were not discussed.

Downward occupational mobility often related to heavy physical jobs (Hirsch, 2007). For example, a CarCo2 mechanic (M, 59) moved into an administration/sales role when the physical demands became too great. Another example, however, related to intellectual strain and adjustments made for a receptionist (F, 57) who had:

“what one might refer to as ‘senior moments’. She’ll be on the phone and she’ll have a call on the phone . . . making an appointment or whatever and they could just be there and she’d forget . . . we’ll probably . . . move her to something else. You know, that doesn’t require the mental agility” (Practice Manager, F, 51, GPSurgery).

Downward occupational mobility also resulted from changing life circumstances and could additionally involve time adjustments. For example, a GPSurgery worker (F, 62) whose husband had died shortly before her planned retirement had instead downshifted from a full-time supervisory role to working 2 days per week as a receptionist. Such i-deals were typically situated within a relational discourse of looking after valued older workers (Ram, 1994) and a desire to support their diverse and changing needs. Adjustments accommodated male and female workers, physical and mental strain, and life events such as bereavement. FWAs were highly individualised, targeting the retention of particular valued workers, and as in the quote above reflected a willingness to tolerate a degree of underperformance.

Bridge employment, where workers had downshifted into these smaller firms from more senior roles elsewhere, also emerged from a relational discourse:

“I was for many years a senior officer in the Merchant Navy and took a severance deal. As a great friend of [owner-manager] he suggested I work for him. So I tend to multitask most of the time” (Sales, M, 56, CarCo1).

There were a number of similar examples. The former area manager of a large car park company now ran a single car park (M, 52, CarCo1), and a former patrol driver for a nationwide breakdown service worked part-time locally servicing vehicles (M, 60, CarCo2). Another had worked for BT for 25 years and now held a part-time administrative role (M, 55, CarCo2). In all cases, bridge employment was designed around individual workers' relationships with a senior member of the firm and was beneficial in a co-incidence of employer/worker need:

"He used to be a headmaster . . . I think he was 50 when he retired and he worked [at TransportCo] until he was 55. I said 'you're too young to retire, get back to work' and we had a joke about it. He said he would like to do some driver's mate work for me and I said, 'never mind driver's mate what about filling in on holidays?' and he went 'yes' and he does both . . . which is ideal. He does a lot of golf unfortunately on busy days [laughing] but that's his choice" (Owner-manager, F, 52, TransportCo).

Within this relational discourse, *i-deals* were used opportunistically in recruitment rather than as a strategic mechanism to compete in the wider labour market (Fuertes *et al.*, 2013).

Work-role FWAs via *i-deals* allowed workers to sustain both capacity (Kooij *et al.*, 2010) and motivation (Kooij *et al.*, 2008) to remain in employment. While some have questioned the impact of downward occupational mobility (Jorgensen and Taylor, 2008), our data suggest they were positively viewed. In relation to the receptionist for example:

"I didn't know how easy she would find it to let go of responsibility and – of that role and . . . be one of the girls again . . . But it worked out well" (Practice Manager, F, 51, GPSurgery).

Those taking up bridge employment also spoke positively about it. In our sample, these workers were individuals with advantaged work histories who were well placed in obtaining (arguably high quality) work-role FWAs. *I-deals* thus addressed the diverse needs of older workers across gender, job type, job level and domestic circumstances.

Ad hoc work-role FWAs for older workers also emerged from our data and have not, to our knowledge, been evidenced elsewhere. These FWAs comprised usually tacit adjustments within the same role. They were situated within a relational discourse of fair treatment in which employers and workers depicted negotiation and accommodation as prominent (Boxall, 2013). They were again highly individualised. For example, an older worker at GPSurgery underwent hip replacement (F, 50plus) and was discreetly supported by offering duties that, temporarily, did not require her to use the stairs. At TransportCo, courier appointments were tacitly arranged so that (mainly male) older workers had support with heavy deliveries. These FWAs were neither permanent nor expressly negotiated. Rather, they evolved from implicit understandings by both employers and fellow workers of the occasional accommodations required:

"[Worker] who's 62 and that is old for being on the tools so I think he isn't given the worst jobs . . . The real [heavy stuff]. He does MOTs. He does lighter work but he still works all his hours and he's dedicated. He's never off sick" (Director, M, 53, CarCo1).

"I suppose I can only look at [worker] who is our 62 year old mechanic who has been here for over thirty years. He's amazing. He's under cars . . . you know you forget how old he is . . . and they all help each other. If [worker] has got to push a car in, they'll all be out there [to help him]" (PA, 50, CarCo1).

Owner-managers and (younger and older) workers alike presented examples of tacit adjustments to support older colleagues in the conduct of their roles. These were again individualised to particularly valued workers, and a willingness to tolerate a degree of underperformance was evident.

To summarise, older workers needed and valued work-role FWAs that addressed a diverse range of need in this heterogeneous group. FWA's offer was nested within supportive social relations (Edwards and Ram, 2006) and individualised rather than reflective of any wider strategic commitment (Fuertes *et al.*, 2013). I-deals and ad hoc FWAs facilitated opportunistic recruitment and retention of (particular valued) older workers and suggested a willingness to tolerate reductions in work performance.

## DISCUSSION AND CONCLUSIONS

This article responds to Loretto *et al.*'s (2009) call for research into FWAs for older workers. Within the smaller firm context, we demonstrate that older workers both need and value FWAs, and that they serve, at least for some, to sustain their working lives (Hirsch, 2007). We further evidence that both temporal and work-role FWAs, the latter not currently reflected in FWA literature, are important for older workers. Finally, we demonstrate that smaller firms can offer FWAs, albeit via i-deals and ad hoc means rather than the typically espoused policy-based approaches. Indeed, there was little evidence of the supposed reluctance in accommodating older worker FWAs (Loretto and White, 2004; Beck, 2013) and little consideration of the associated costs. Our findings support contributions to theory, practice and policy.

We make two theoretical contributions. First, we develop definition of FWA type to include work-role, *i.e.* not just where and when but also *how* work is arranged. Current definitions emphasise temporal and spatial FWAs that privilege the needs of working parents (Gardiner *et al.*, 2007). An extended definition addresses the needs of older workers as work-role adjustment here supported the diverse needs and changing abilities and desires of workers as they aged, sustaining capacity and motivation to work (Kooij *et al.*, 2010). There is limited research on work-role FWAs for older workers, and we have begun to build an evidence base. This has important implications: a definition that incorporates FWA types relevant to a diverse workforce guides the design of practices that address a wide range of needs. Second, we develop understanding of formality of FWA offer. Current research emphasises policy-based FWAs (Dickens, 2006). While it is recognised that absence of policy does not preclude FWAs (Dex and Scheibl, 2001), conceptualisation of this is limited. We use the concept of i-deals (Rousseau *et al.*, 2006) and demonstrate their importance in delivering valued FWAs. We also demonstrate the important role played by ad hoc FWAs. Both reflect the importance of an idiosyncratic, individualised approach to FWAs. While this is particularly relevant to the small firm context, it may also, as we note below, have wider resonance (see also Atkinson and Hall, 2009). This again has important implications: the offer of individualised FWAs requires care and thought in design and implementation. We consider now how these theoretical contributions inform practice.

First, our extended definition of FWAs indicates that this general HR practice should be tailored to the needs of older workers (Kooij *et al.*, 2013) and that this may require its radical redesign (Coupland *et al.*, 2008). FWAs for older worker benefit are more diverse than typical FWAs. Temporal i-deal FWAs mirrored wider patterns of part-time working options (Loretto *et al.*, 2005) taken up mainly by women (Smeaton and Vegeris, 2009). Beyond this, however, both ad hoc temporal FWAs and i-deal/ad hoc work-role FWAs addressed more diverse needs. Older workers were accommodated through temporary absences, occupational mobility

(Smeaton and Vegeris, 2009), bridge employment (Loretto *et al.*, 2005) and temporary role adjustments. While we found limited evidence of spatial FWAs, this may relate to sample limitations. We, therefore, encourage practitioners to design a wide range of FWAs, particularly work-role, to address the needs of the heterogeneous older worker group (Loretto *et al.*, 2009) and support its diverse preferences (Kooij *et al.*, 2010). Second, we demonstrate an important role for individualised, rather than policy-based, FWAs. These may be either formal or informal, but care is needed in their offer and implementation. Individualised design requires skilled practitioners and managers able to identify and address particular worker needs and to do so in a way that does not give rise to discrimination (Loretto and White, 2006). An individualised offer may also occasion lack of worker awareness of options (Maxwell *et al.*, 2007) and work against the realisation of strategic benefit from FWAs. For example, policy-based FWAs support general recruitment, whereas individualised FWAs will attract only targeted workers. Similarly, retention may be limited to those (valued) older workers with the volition and skills to negotiate their own FWAs. Given smaller firm reliance on older workers (Edwards and Ram, 2006), this may limit the effectiveness of FWAs in supporting their recruitment and retention, and render smaller firms susceptible to labour shortages as the workforce ages. Support and training will be important in the effective introduction and management of (particularly individualised) FWAs for older workers.

Our third contribution is to challenge current policy approaches on two fronts. First, policy draws upon a strategic discourse that emphasises the business case for older worker FWAs (DWP, 2011) and recommends policy-based practice (Loretto and White, 2006). We demonstrate, as is typical in smaller firms, a lack of strategy and policy (Fuertes *et al.*, 2013). Alongside low awareness of changing demographic patterns and their labour market impact (Fuertes *et al.*, 2013), there was limited recognition of the business case for either older worker employment (DWP, 2011) or FWAs (Riach, 2009). FWAs were not part of a planned response to labour market pressures. Across our sample, the unifying theme was owner-manager approach. FWAs formed part of their relational discourse of looking after certain valued workers as they aged (Mayson and Barrett, 2006) within a process of mutual adjustment (Ram, 1994). Older worker skills and experience were demonstrably valued (Hewitt, 2009), and performance levels were generally maintained (Griffiths, 2007). Underperformance was, however, tolerated within the relational discourse, which again is at odds with a business case approach. Policymakers must recognise this policy/practice disconnect and find advice mechanisms for smaller firms relevant to their context that disseminate appropriate practice while helping to avoid inherent short-termism. Second, policy addresses 'older workers' as a coherent group but, as we have demonstrated, it is heterogeneous with diverse needs. Greater policy recognition of this is required, and a move beyond promotion of simply temporal and spatial FWAs will support this.

In summary, we argue that idiosyncratic, individualised approaches allow smaller firms to deliver FWAs in beneficial ways, reinforcing their contribution to productive ageing (Simpson *et al.*, 2012) and extending working lives (Hirsch, 2007). FWAs, thus, constitute part of the minimum set of HR practices required for smaller firm success (Marchington *et al.*, 2003; Atkinson and Lucas, 2013). An important question, in an under-researched area, is to what extent our findings are specific to smaller firms. While our sample renders impossible a definitive answer, an idiosyncratic approach may make smaller firms better placed to respond to heterogeneous, older worker needs (Loretto and White, 2006). The very absence of formal, and potentially bureaucratic, policies could enhance responsiveness, albeit risking short-termism (Loretto and White, 2006). However, while larger firms are more likely to develop formal policies, research suggests that idiosyncratic responses are nevertheless still prominent in this context (Dickens, 2006; Rousseau *et al.*, 2006; Atkinson and Hall, 2009). Our

findings may, therefore, have wider resonance, and we suggest that future research could explore their relevance beyond smaller firms. Further, it could develop understanding of both work-role FWAs, given its emergent nature, and spatial flexibility, given its relative absence in our findings.

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