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BACKGROUND

The Baby Boomer Generation—individuals born between 1946 and 1964—has had a significant impact on the US economy and workplace. As Baby Boomers age, we are faced with unique and unprecedented challenges and opportunities. In 2005 there were 78.2 million Baby Boomers (U.S. Census, 2007); the first wave is slated to retire in 2008. Some of the individuals reaching this milestone will make the decision to continue to work either for economic reasons or for the social benefits associated with work. As this aging population remains in the workforce, the incidence of disability and/or health considerations will inevitably increase, impacting the manner in which they work. While some Baby Boomers will elect to work beyond traditional retirement age, many others will choose retirement. The smaller size of subsequent generations will result in critical changes in the labor force. This will have significant implications for employers, who will need to tap into non-traditional labor pools in order to remain competitive. How are some employers dealing with these workforce shifts? This brief explores the efforts of companies that are responding to these challenges through focused attention on recruiting and retaining older workers.

This brief describes the motivational factors that drive companies to focus on older workers, the cultural contexts of businesses that have undertaken these practices, and the range of recruitment and retention practices and initiatives they use. Researchers conducted case studies at several businesses, both large and small, across the U.S. This brief offers suggestions to all employers on the relevance of the findings to their own workplace practices, initiatives, and cultures. The brief concludes with a discussion of an emerging approach, Universal Design Solutions for Employment, which enables businesses to capitalize on current and future workforce conditions.

IMPETUS FOR DEVELOPING RECRUITMENT AND RETENTION STRATEGIES

Several themes emerged to explain the reasons why participating companies developed and initiated strategies to recruit and retain older workers.

- ▶ **Companies responded to demographics.** Along with overall labor force changes, companies examined internal demographics and responded to the needs found.
- ▶ **Older worker practices were part of a wider initiative.** Companies reported that initiatives around diversity and inclusion improved the work lives of all employees.
- ▶ **Employers perceived older workers as better workers.** The traits companies cited included reliability, long-term commitment to the company, and strong work ethic.
- ▶ **Companies emphasized a multigenerational workforce.** Such diversity lent complimentary strengths, potential for mutual learning, and increased understanding across age groups.
- ▶ **Companies valued older workers for their expertise and knowledge.** Organizations devised innovative approaches to retaining that knowledge base with attractive accommodations or by luring mature experts back into a working relationship.
- ▶ **Older workers were a “good fit” with job and culture.** Companies found that older workers were uniquely suited for positions because of the company’s atmosphere, the type of jobs available, or the skills and attributes being sought.
- ▶ **Hiring and retaining older workers made good business sense.** Companies did not report that they engaged in recruitment and retention practices because such endeavors were the “right” thing to do. Rather they were more inclined to state that it solved a business need (such as high turnover) or broadened the company’s market potential. For instance, a retail company reported that having a demographic mix similar to its customer mix has resulted in increased sales.

CULTURAL CONTEXT

The culture and environment of the businesses provided the context for many of the recruitment and retention strategies they developed and implemented. This context was defined by the following components:

- ▶ **Strong values.** The articulation of strong values drove companies to provide a framework for establishing practices that fully supported workers.
- ▶ **Multi-level dedication and loyalty.** Respondents spoke of feeling a sense of partnership with their companies.
- ▶ **A sense that employees were valued.** Respect, a caring atmosphere, and recognition for performance led workers to feel that they were valued and contributing members of their organization.
- ▶ **Open communication.** Employees could approach managers and leadership, express their views, and feel that their voices were heard.
- ▶ **Independence and autonomy.** When companies valued their employees, they gave workers the freedom and autonomy to perform their roles effectively, which in turn led to job satisfaction among older workers.
- ▶ **Opportunities for socialization and community involvement.** Social time fostered relationships that led to greater teamwork, higher productivity, and stronger morale.
- ▶ **Teamwork (an essential trait).** Respondents referred to one another as being part of a team or family that partnered and contributed to a common goal, or solved a business-related problem.
- ▶ **A low-pressure and relaxed atmosphere.** Respondents described this type of culture as being a good fit for older workers and matching their personal desires.
- ▶ **Multigenerational issues.** Employers were just starting to understand the perceptions and stereotypes of younger and older workers, and to consider these issues when supporting different generations to work together effectively.

RECRUITMENT STRATEGIES

Several companies took pains to underscore that they by no means targeted older workers for recruitment; rather, the ultimate goal was to find the best worker for the job. Others described the emphasis on older workers as altogether informal and even unintended. However, several recruitment strategies were identified:

- ▶ **Employee referral.** Word-of-mouth among employees and their associates was an effective, informal way that businesses recruited older workers. When employees were satisfied with and felt valued by their companies, they passed on this information to their personal connections. This communication often resulted in good matches between new employees and the culture of the organization.
- ▶ **Collaboration with community partners.** Businesses used collaborations with organizations that specifically targeted older populations, such as AARP, to build their pool of potential candidates. Companies also found local Offices on Aging to be an excellent resource for new employees. Some offices kept an active list of seniors searching for employment.
- ▶ **Recruitment from the volunteer pool.** Particularly for health care organizations, the volunteer pool, often comprised of seniors, was fertile ground for recruiting new workers. Volunteers tended to know each other well, especially in smaller organizations; word-of-mouth among them was also an effective tool for attracting older employees.
- ▶ **Formal recruitment programs among businesses.** Only one company in this study has a formal recruitment program aimed at older workers, targeting areas where seniors typically congregate such as libraries, community centers, and churches. This program, however, was just one example of targeted recruitment that ensured a diverse and multigenerational labor supply that responded to the clients' needs.
- ▶ **Tapping into retiree associations.** Keeping in contact with the company's retirees through associations helped keep the lines of communication open in case retirees wanted to return to the workforce in some capacity and organizations had unmet needs. The use of a "float pool" of retirees in health care organizations was a good example of the flexible opportunities available to retired nurses should they decide to continue working on a temporary basis.

RETENTION STRATEGIES

With the exception of the existence of formal phased retirement programs, each of the retention strategies uncovered was universal in nature—that is, available and useful for all current or potential employees. Older workers took advantage of several initiatives or practices that facilitated retention.

- ▶ **Phased or modified retirement options.** Companies realized that they continued to need the expertise of mature workers, and granted them the option of a gradual transition to retirement. This ensured that older workers continued to engage with the company and passed on institutional knowledge in a standardized and equitable way.
- ▶ **Job flexibility.** Companies adjusted employees' work schedules and responsibilities in an effort to encourage older workers to remain on the job. Options included telecommuting, compressed schedules, job-sharing situations, and seasonal employment. Additionally, in many cases workers were able to retrain into different positions or modify their roles to reflect changing needs and preferences.
- ▶ **Comprehensive benefits packages.** Businesses extended benefits beyond health insurance and 401(k) plans to include comprehensive family supports, wellness programs, investment and personal counseling, and other informal “perks” to support employees' needs. These types of programs conveyed the message that employees were viewed holistically and offered support in all aspects of their lives.
- ▶ **Professional growth and development opportunities.** Businesses supported programs that employees valued, such as formal training programs or informal mentoring opportunities between employees. Companies placed a high value on “growing their own” and strove to offer opportunities for professional development so that employees would stay and grow into leadership positions. These organizations had a clear emphasis on investing in employees.
- ▶ **Other workplace accommodations.** As workers aged, the physical requirements of a job could jeopardize both an employee's health and productivity. Especially in the health care field, companies developed initiatives to reduce stress on employees' bodies (such as guidelines, practices, and special equipment for transporting and lifting patients) in order to ensure the health, safety, and retention of staff. ■

CONSIDERATIONS FOR EMPLOYERS

The employers in this study were chosen because of their forward-thinking approaches to recruiting and supporting workers. They provided insightful examples of innovation that other employers could benefit from. Drawing from these findings, researchers offer the following considerations to employers as they examine their own workplace cultures, policies, initiatives, and informal practices.

Many of the motivational factors that drove the development and implementation of these practices apply to all businesses.

The picture of the U.S. labor market shows an increasingly diverse workforce, with older workers prominently included. As the population ages and labor shortages mount, the innovations and insights these participants shared will become the necessary modus operandi of companies large and small across the U.S. The findings of this project suggest that employers are willing to innovate around diversity in the workforce and move towards universal human resource strategies if they are motivated to do so. In short, companies want to do the right thing, as long as “the right thing” advances their bottom-line company goals. Vital benefits to employers include finding solutions to longstanding corporate problems and expanding their market potential.

Creating a workplace culture that cultivates and stimulates the development of such strategies is critical.

The type of culture that welcomes older workers benefits all workers. In that sense, the culture of an organization is a universal and unifying element that can create a positive environment for many different types of workers. A supportive work culture was key in establishing many other practices that helped workers feel valued. Businesses that recognized employees' contributions found that these efforts helped to retain older workers. Staff often said that company values mirrored their own and resulted in long-term company loyalty.

Employers can create opportunities for employees to actively participate and communicate by establishing subcommittees of different types and levels of workers, holding periodic issue forums where employees can bring up concerns and challenges, and cultivating an open-door policy among leaders and managers. Employers can also ensure opportunities for employee collaboration through team-based activities, mentoring, and social events. Social events such as employee appreciation activities, retreats, shared meals/breaks, and holiday parties can improve overall employee morale and help develop ties among workers.

These strategies are universal in nature.

The enlightened practices articulated in this study reflect an increasingly universal approach to recruitment and retention. The range of retention strategies made it especially evident that many types of employees, including older workers, accessed and benefited from the initiatives created. Thinking more universally about practices around employment promoted the hiring and appropriate support of all workers. These employer initiatives offered many of the same attributes, solutions to embedded problems of turnover and unmotivated workers, and a “good business sense” approach to building an organization that supports a diverse workforce.

Assessing the level of universality of one’s own recruitment and retention strategies is a crucial starting point for employers. Companies should consider whether policies aimed at specific groups can benefit the larger workforce. When companies can understand that what they are already doing can benefit new hires, they can focus on the skills and strengths of new applicants without considering what special considerations may be necessary for them to be successful. Businesses also need to take stock of the policies and practices that they have in place and strive to implement more universal approaches that may benefit the majority and are not necessarily targeted to one population.

Consider the transferability of these strategies to other target groups.

As noted, many of these recruitment and retention strategies parallel strategies used for other populations. Employers can begin by recognizing and applying existing strategies to other groups. For example, the companies in this study relied on the peer connections of their current workforce to access new employees. Employers can encourage their workers to identify and utilize their personal and professional networks to find and recruit job seekers who would be a good fit for the organization. The community partners and placement agencies companies used to recruit older workers can be effective for recruiting candidates from other diverse backgrounds as well.

To truly address their future needs and impending labor market shortages, businesses must expand their thinking beyond retaining their current workforce and focus on recruiting new members into the workforce—those that can add diversity, longevity, and stability, helping companies accomplish their long-term goals. Within their own companies, employers should require diversity awareness training to ensure that their recruitment taps all potential candidates.

Reflect on the advantages of hiring from a diverse candidate pool.

The businesses in this study recognized the value that diversity brought to their organizations. They were successful partly because of the unique abilities, cultures, age groups, and individuals that constituted their employee base. A diverse workforce is often part of a strategic business plan; as such, specific recruitment efforts should tap all sources of available talent.

Employers can draw attention to the benefits and attributes of hiring from a diverse candidate pool by sharing stories in publications and forums, from one business to another. Sharing these stories from their own experiences, business to business, will help dispel any potential negative stereotypes about workers from diverse backgrounds that can keep employers from hiring them. It can also illuminate the reasons why these practices enriched and enhanced their workforce. ■

UNIVERSAL DESIGN SOLUTIONS FOR EMPLOYMENT



As a new workforce emerges, employers need to consider the spectrum of employees and develop policies and practices that promote productivity for all. One response to this is the concept of universal design. Originally incepted to promote architectural access for people with disabilities, universal design has expanded to include access to technology, education, and services for a diverse public. Universal design focuses on practices and processes that are flexible, have maximum usability and can apply to many facets of life. Common examples of universal design include:

- Closed caption video used by people in restaurants and gyms, people who are deaf, and others
- Curb cuts designed to make sidewalks accessible to wheelchair users, which also benefit parents with strollers
- Automatic door openers that assist people carrying groceries or people who are unable to pull a door open

Universal Design Solutions for Employment carries this concept through all elements of the workplace to ensure that everyone can access employment. **Universal Design Solutions for Employment** reflect a proactive approach to establishing simple, flexible and efficient programs and strategies that provide optimum outcomes for all throughout the work–life cycle. This concept can be applied within the business community to address increasing workplace and customer diversity, thereby enhancing businesses' ability to compete in the global marketplace.

Whether an employee's diversity is represented in ethnicity, age, disability, language, or literacy levels, the principles of flexibility, ease of use, and efficiency will promote a welcoming internal culture, and can enhance productivity and broaden the customer base. Below are examples of how to apply this concept across a range of employment interactions:

Organizational culture

- Recruitment approaches are continuous and proactive and include a range of sources (peers, placement agencies, community organizations geared toward target populations) to ensure the widest range of applicants.
- The organization encourages its supervisors to have flexibility in customizing jobs to department and supervisee needs.
- Leadership development focuses on growing existing employees through hiring and promoting internally.

Communication

- Organizational values are communicated and demonstrated throughout the orientation process.
- Multiple systems for communication combine formal (e.g., suggestions box, employee satisfaction surveys) and informal mechanisms (e.g., open-door policies).
- Systemic and routine recognition of employee achievements occurs.

Supervision and management

- New employees are matched with a seasoned peer to help acclimate to the workplace.
- Negotiation of job descriptions, functions or roles is a regular process in supervision and annual reviews.
- Supervisors are trained on coaching strategies to encourage employee development.

Welcoming and accessible environment

- Company website conveys an image of universality, diversity, inclusiveness, and flexibility through the use of employee testimonials and/or company photos.
- The office layout takes into consideration each worker's unique needs while promoting maximum efficiency for all workers with a diversity of work styles (e.g., individuals' needs for quiet or interaction with co-workers).
- Multiple training modalities exist such as classroom-based learning, role playing, on-the-job training, and small team-based learning.

Flexible workplace

- Flexibility in job descriptions or the latitude to create new job descriptions responds to company's changing needs and individual assets.
- Adjustments in employee work schedules are based on personal needs (telecommuting, compressed schedules, job-sharing and seasonal employment).
- Flexible holidays or earned time programs allow individuals to take time off for holidays or religious events that are important to their cultures and beliefs.

As the workforce evolves over the next 10 years, we are presented with an opportunity to be innovative and proactive in our approach with employers, ultimately resulting in greater access to employment for all. Resources for employers toward the development of universally designed workplaces in terms of physical space, operational policies and practices can support this new vision.



UDS Consulting For Employment consults and trains in the following areas of workforce management:

- ▶ organizational culture
- ▶ supervision and management
- ▶ flexible workplace strategies
- ▶ welcoming and accessible environments
- ▶ communication

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ABOUT THE RESEARCH

The Institute for Community Inclusion, in conjunction with the U.S. Department of Labor's Office of Disability Employment Policy, undertook a one-year project that examined practices and strategies implemented by U.S. companies seeking to recruit and retain older workers. This brief presents themes that emerged from phone conversations with employees at 18 companies in 13 states.

Five of those companies subsequently participated in more in-depth, in-person visits. ICI staff held phone conversations with human resource or diversity program representatives; during in-person visits, researchers had discussions with a wide range of informants, from company leadership to frontline supervisors and managers to older workers themselves.

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