Age: A 21st Century diversity imperative

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Persistent link:

EXECUTIVE CASE REPORT NO. 4

AGE: A 21st CENTURY

DIVERSITY IMPERATIVE

Cornell University

DELL

gsk GlaxoSmithKline

Marriott®

MITRE

WELLS FARGO

THE SLOAN CENTER ON
aging & work
AT BOSTON COLLEGE

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http://www.bc.edu/agingandwork

Acknowledgements:

EXECUTIVE SUMMARY

In the first half of the 20th century, the population of the United States was comparatively young due to moderately high birth rates, declining infant and childhood mortality, and immigration by young workers and families (see Figure 1). Since mid-century, the country has been in the midst of a profound change in age demographics with a rapidly aging population.[1]

Figure 1:   Percent Distribution of the Total Population by Age: 1900-2009

Year	65+	45-64	25-44	15-24	<15
1900	4.1	13.7	28.1	19.6	34.5
1910	4.3	14.6	29.2	19.7	32.1
1920	4.7	16.1	29.6	17.7	31.8
1930	5.4	17.5	29.5	18.3	29.4
1940	6.8	19.8	30.1	18.2	25.0
1950	8.1	20.3	30.0	14.7	26.9
1960	9.2	20.1	26.2	13.4	31.1
1970	9.9	20.6	23.6	17.4	28.5
1980	11.3	19.6	27.7	18.8	22.6
1990	12.6	18.6	32.5	14.8	21.5
2000	12.4	22.0	30.2	13.9	21.4
2009*	12.5	26.1	27.1	13.9	20.3
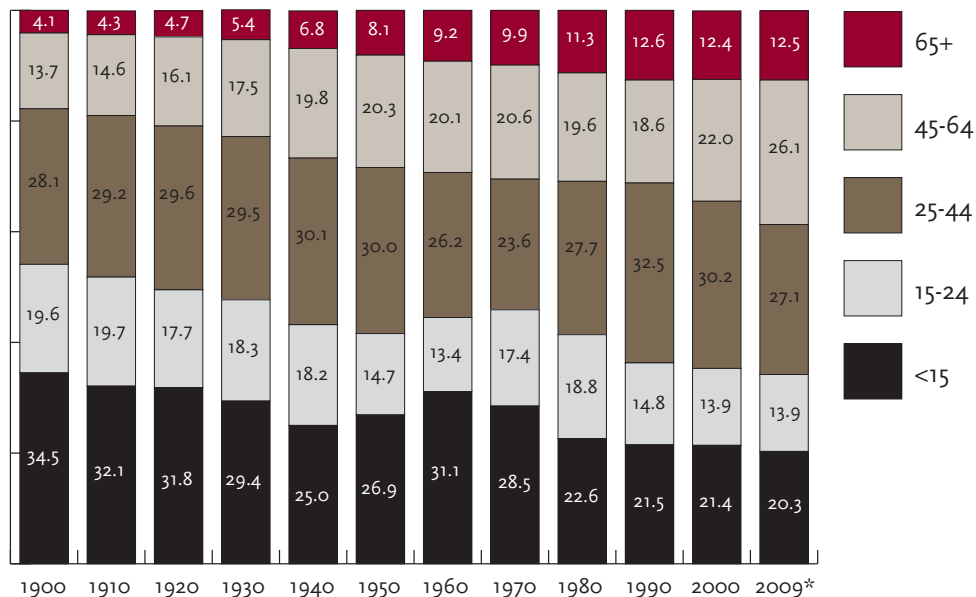
*Note – 2009 is the most recent data available.

There is a small but growing amount of research-based information on employer perspectives about changing age demographics of the workforce as well as on employer responses in terms of diversity and inclusion strategies. However, there has been no systematic attempt to explore the impact of age diversity initiatives within organizations.

At the Sloan Center on Aging & Work at Boston College we had reason to believe that employers were considering age as a component of their diversity and inclusion initiatives, based on our examination of age-management policies/practices using data from our Age & Generations study.[2] We also believed that their focus was primarily on Chronological Age and less on Occupational, Life Events, Generational, Organizational, Relational or Psycho-social Age, all of which we have labeled the "Prism of Age"—a complex and multifaceted phenomenon.

In June 2010, the Center launched the "Age: A 21st Century Diversity Imperative" project to answer questions about age diversity including:

1. Is age a diversity imperative within leading organizations?

2. How are employers making decisions about age diversity?

3. What business drivers are influencing employers' decisions about age diversity?

4. What barriers or challenges in developing an age diversity strategy are employers facing?

5. What promising practices are being developed by employers?

6. How are employers measuring success?

Each of these questions are explored in this paper and highlighted in the following case studies. Over the years, various age management approaches have emerged with promising practices.

Organization	Promising Practice	Description
Cornell	Encore Cornell	Program for retirees enabling project work, consulting, volunteerism and website resources.
Dell	GenNext	Employee resource group for employees aged 30 and younger.
GlaxoSmithKline	Prime Time Partners Network	Employee resource group for employees in mid- to late-career.
Marriott	Intergenerational Toolkit for Managers	Toolkit to better equip managers with the resources needed to successfully lead multigenerational teams.
MITRE	Workforce of the Future	Focused efforts to recruit, engage and retain young employees to help develop innovative solutions to some of the federal government's most complex technological challenges.
Wells Fargo	Boomers Network and Young Professionals Network	Employee resource groups for boomers and young professionals.

Key Discoveries

Following an analysis of the interviews conducted with the employers, five discoveries became project themes:

1. **Age diversity strategy is not clearly defined within organizations**. All of the employers have a well-defined and communicated diversity and inclusion strategy. While each has developed promising practices to address age-related challenges, most have not communicated a formal age diversity strategy.

2. **The approach to age diversity is evolving within organizations:** Organizations have transitioned from a compliance-only focus, to an older worker and then multigenerational approach, to an integrated age management strategy. It is this evolution, based on a holistic approach to age diversity, that provides the foundation for the recommendations in this report.

3. **The Prism of Age concept and its various dimensions described in this report resonate with human resource leaders.** The employers immediately recognized how the most common dimensions of age align with their initiatives; however, other dimensions such as psycho-social age and relative age needed some explanation. When the Prism of Age dimensions were defined, employers offered workplace examples. One employer felt that her lack of focus on the broader dimensions of age within her organization's efforts was surely a missed opportunity.

4. **The primary age diversity focus in the workplace is on multiple generations**—Veterans (born before 1946), Baby Boomers (born 1946-1964), Gen X (born 1965-1980), Gen Y, also referred to as Millennials (born 1981-2000), and the up and coming Gen 2020 (born after 2000). Even in organizations where age-related initiatives have been implimented, focused on younger or older workers, the internal strategic focus is on the four generations in the workplace and enhancing intergenerational relationships.

5. **Socialization is a key component** of each of the promising practices in the format of affinity groups, networking events, social media, customized new hire orientation sessions, etc.

PROJECT BACKGROUND AND METHODOLOGY

"Age: A 21st Century Diversity Imperative" was launched as a project by the Sloan Center on Aging & Work at Boston College in June 2010 and consisted of three primary components:

- An age diversity literature review;

- Telephone interviews with human resource managers from leading organizations; and

- Case summaries with examples of diversity and inclusion strategies and initiatives that have an age component.

The project explored employers' strategic approaches to age diversity and their promising practices. Basic questions were answered about whether age is a diversity imperative within their organizations; what business drivers are involved in making decisions about age diversity; what challenges they face developing a strategy; and what promising practices they have launched.

The Center conducted telephone interviews with 14 human resource senior managers and executives representing six organizations. Participants hailed from a cross-section of industries, including education, financial services, hospitality, pharmaceutical, system-engineering, and technology. Each employer participated in 1.5 to 2 hours of interviews which were tape recorded for later review to develop the case summaries. Employers provided additional background data to supplement the interviews and answered follow-up questions about the linkages between quality of employment and age diversity.

INTRODUCTION

Over the past decade, research and media attention have been directed toward various aspects of age in the workplace—primarily the aging and multigenerational workforce. Less attention has been given to exploring specific age diversity efforts in the context of an organization's broader diversity and initiative strategy. Employing an age diversity strategy aligned with the dimensions of age can help employers enhance company culture, recruitment, retention, employee and retiree engagement, and customer service.

This report examines the evolution of age diversity strategies within organizations and reviews the findings from in-depth interviews with six companies—Cornell, Dell, GlaxoSmithKline, Marriott, MITRE Corporation, and Wells Fargo. Each employer shared its age diversity strategy and a specific promising practice along with its business case, implementation steps, metrics of success, and future outlook.

IS AGE A DIVERSITY IMPERATIVE?

Over the past two decades, organizational diversity attention has progressed from compliance-based efforts focused on race and gender to company-wide and global "diversity management," a field that is evolving rapidly.[3,4]

At the same time the definition of diversity has changed as well, expanding to encompass:

- African Americans, Latinos, Asians, American Indians, people of mixed racial heritage, women, lesbian, gay, bisexual, and transgender people, people with disabilities, people of different generations, people of various religious groups, veterans, and immigrants.[4]

- Inclusion strategies and fully integrated systems and processes that enable all stakeholders to feel respected and involved as their contributions are sought, valued, and measured.

The literature demonstrates, and leading companies know, that diversity management practices are essential to drive employee engagement across all groups and to foster the productivity and innovation critical for business success and sustainability.[2,5] But what do we know about age diversity as a stand-alone strategic imperative?

> When asked about their organization's overall diversity and inclusion strategy, the employers mentioned similar foundational practices:
>
> - Corporate-wide initiative; deployed globally; driven by CEO;
>
> - Multiple levels of focus such as workforce, leadership, customers, partners, supplier diversity, education/awareness, talent management, business practices, community, and measurement and accountability;
>
> - Belief that diversity and inclusion results in better innovation;
>
> - Formal Diversity Council—organized executive leadership (internal and/or external) to manage diversity strategy and practices.

Age Diversity Strategy

"While our initial focus was on the creation of an aging workforce strategy, we recognized that our organization is comprised of individuals with multiple backgrounds, experiences, and cultures – thus we realized that greater value existed by utilizing a broader, more inclusive lens."

> ~ Maruiel Perkins-Chavis
> Vice President Workforce Effectiveness and Diversity, Marriott International

While all of the employers have a formal diversity and inclusion strategy in place, when asked specifically if age is a diversity imperative, responses varied. Each employer is in a different place along the continuum of communicating age as a diversity imperative. Although each employer interviewed includes age as a focus area within its diversity management efforts, an age diversity strategy is not clearly defined or as broadly communicated as the diversity and inclusion strategy. Employers' responses to whether age diversity is an imperative in their organization were:

• Yes, our formal diversity and inclusion vision calls out age, among other traits. (Wells Fargo)

• Yes, multi-generational considerations create a strategic imperative and a lens for implementing initiatives across the organization. (Marriott International)

• Yes, as it relates to generations. (Dell)

• Yes and no; our recent focus on Millennial and GenX recruitment has made age become an imperative. (MITRE Corporation)

• Age is a compliance issue first and foremost. However, in certain geographies age plays a larger role in our diversity strategy. (GlaxoSmithKline)

• Somewhat, as we have been looking at ways to make age a more prominent aspect of diversity. We are a little bit on the outskirts still. (Cornell University)

In September 2010, the Sloan Center on Aging & Work asked its Employer Learning Circle colleagues the same question. Eighty employers, from industries such as pharmaceuticals, healthcare, manufacturing, professional services, hospitality and education, answered the survey (see Figure 2).[6]

Figure 2:   Does Your Organization Consider Age a Diversity Imperative?
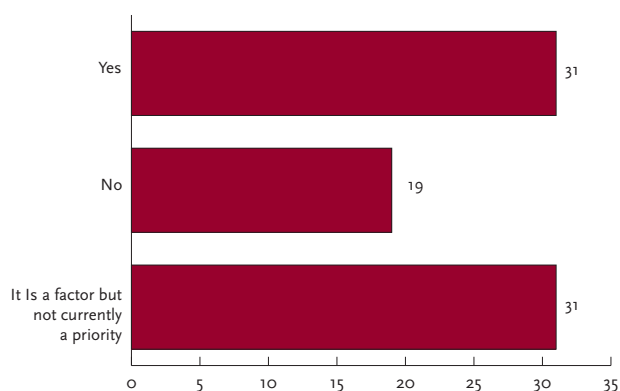
Evolution of Age Strategy

"The first areas of diversity we focused on as a company were gender and representation of women in the workplace. The next major focus areas were culture, ethnicity and sexual orientation. Recently, we expanded beyond the traditional approach to focus on diversity and inclusion and this is where age comes in."

~ Philomena Morrissey Satre,
Vice President of Diversity & Inclusion, Wells Fargo

Key Discovery #2

Age diversity approach is evolving.
Similar to the evolution of diversity management, age diversity practices seem to have emerged as a compliance response. Based on our research and employer interviews, the approach to age diversity within organizations is stepping through several distinct phases which are not mutually exclusive.[2,3,7]

Each of our participating organizations described age diversity practices that fit into each of the phases below; however, no organization has created a formal, fully integrated age management strategy (see Figure 3).

Possible explanations emerged from our interviews. First, participants expressed the need to use caution in the workplace when addressing issues related to age or even when using the term "age." Second, each employer has incorporated some type of multi-generational approach into its diversity and inclusion strategy which bypasses the "age" terminology and broadens the lens to view the entire life cycle of employability from co-ops and interns to retirees.

Phase I: Age-Related Legislation

Focus on compliance and anti-discrimination in the workplace:
Equal Employment Opportunity (EEO) and
Age Discrimination in Employment Act (ADEA)

Phase II: The Graying Workforce and Brain Drain

Focus on addressing issues due to the aging workforce, anticipated
Baby Boomer exits and knowledge transfer

Phase III: Inclusion and Multigenerations

Focus on diversity *and* inclusion introduced multigenerational
approaches to ensure that employees of all ages feel valued and
able to contribute to business and personal success

Phase IV: Integrated Age Management

New way of thinking and approaching age and employment result-
ing in holistic HR strategy, framework and alignment of systems
throughout the organization

Age Dimension Relevance

The Center's concept of the Prism of Age provides employers with a broad context to consider when developing policies, programs, and practices that respond to age-related needs. An individual employee's journey through career and life does not necessarily follow a predictable path. The Prism of Age encourages employers to think beyond chronological age and generations as they develop age diversity strategies.

Key Discovery #3

The Prism of Age resonates with employers.
When we asked the employers about the relevance of the Prism of Age and discussed each of the dimensions during the interviews, there was some pause and thought on the part of each employer. For some, the definitions were very clear and dimensions could easily be applied to their age diversity work. For others, the relevance of the dimensions was less clear. Several realized during the interview that they hadn't given much thought to the various dimensions, yet they realized their relevance. One employer, commenting on relative age [how individuals perceive their age compared to others in their workgroup] and its relevance to their promising practice stated, "We should have thought about that; we missed an opportunity."

Dimensions in the Prism of Age

Age is more than just a number based on date of birth. Because people are living longer, chronological age may not be the most reliable indicator of where people are in their lives. Age is how you feel, it is how others perceive you, it is how you perceive yourself, it is what you have experienced ... and so on. The Prism of Age is a framework developed by the Sloan Center on Aging & Work as a way of understanding the implications of age for today's multigenerational workforce.

Dimensions of age that impact who someone is, include:

Chronological Age
Based on the number of years lived. "*I'm 46.*"

Generational Age
One's generational "age"—Traditionalist, Baby Boomer, Gen X and GenY—is often defined by macro societal factors (such as economic circumstances, historical events, and dominant cultural values) that have a sustained impact on the ways that large groups of people of approximately the same chronological age see the world and make meaning of their experiences. "*As a baby boomer I had to work long hours and pay my dues to get ahead; others should have to do the same.*"

Physical Age
Physical Age is relative to an individual's health and the impact on life expectancy or the ability to carry out daily tasks. "*My short-term memory isn't what it used to be. But if I take good notes at meetings and archive my e-mails, it's not an issue at work at all.*"

Psycho-Social Age
Psycho-Social Age is how old society or others perceive an individual to be. For example: "*40 is the new 30.*"

Life Stage (Age)
Major events and transitions shaping an individual's life, such as marriage or the birth of a child. *"This fall my kids will all be in school full-time so I'm going to talk to my boss about a possible promotion."*

Organizational Age
The number of years an individual has been with an employer or in a particular job or profession. *"I started working in this field when I was 16 after I finished vocational high school. Now I've been here longer than any of my co-workers and I'm only 30."*

Career Stage (Age)
Experiences that mark an individual's accumulation of knowledge, competencies, skills and social capital related to a particular type of career or line of work. *"I just switched careers after 25 years in my previous job. It's invigorating to be a 'newbie' again, career-wise!"*

Relative Age
How old an individual feels in reference to others in a workgroup. *"I feel 'old' in comparison to others on my new work team; they are all much younger than me."*

Subjective Age
How old an individual feels which might be very different from their chronological age. *"You're only as old as you feel."*

Normative Age
How we see our own age compared to societal norms and personal expectations constitutes "normative age." *"Many of my friends have married and started children by my age, I feel like I've missed the boat."*

Emotional Age
Emotional age refers to an individual's interest in pursuing specific roles and responsibilities, or some type of developmental task at a given moment in life. *"Over the years, I feel that I've gotten to know myself better...my strengths, my weaknesses, what motivates me, what I want and what I don't want in my life. I think that this self-awareness has helped me to do my job better."*

Employer Perceptions of Age

We asked the six employers to rate the relevance of seven of the dimensions of age to the specific promising practice they described for this study. Consistent with the research and discussions with these employers, the dimension considered most relevant was generation, with chronological age taking a close second. Far less relevance was placed on relative age and psycho-social age; however, these dimensions involve perceptions of age in relation to colleagues and thus are dimensions important to consider within the age diversity management realm and supervisor/manager interactions (see Figure 4, which reflects the average score for each of the age dimensions discussed with the employers).[6]

Figure 4:   Relevance of Age Dimensions to Specific Promising Practice
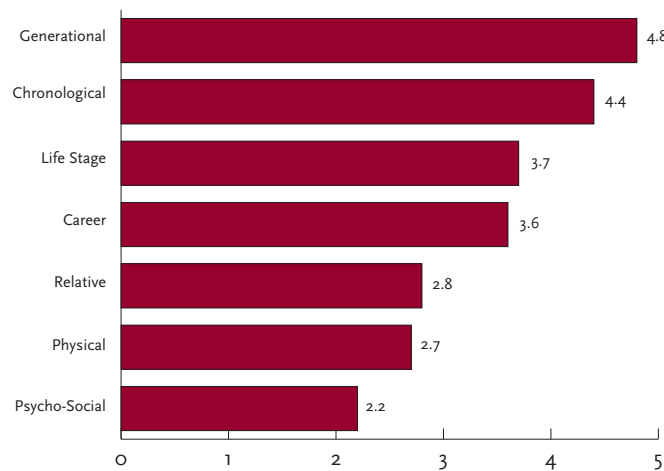
Employers were asked to rate each dimension from 1 to 5 using the following scale:
1 = Not at all relevant
3 = Moderately relevant
5 = Extremely relevant

BUSINESS CASE

The business drivers for innovation in age diversity management and the promising practices in this study are broad and can have a positive impact on the bottom line. In *Leading a Multigenerational Workforce*, AARP identified the positive effects of addressing intergenerational dynamics on the bottom line in a number of areas including corporate culture, recruitment, employee engagement, retention, and customer service.[8] The business drivers for each of the promising practices in this study fall into the same areas.

Business Case for Addressing Intergenerational Dynamics (AARP, 2007)	Business Case for Employers' Promising Practices
Corporate Culture Employee Engagement	• Developing intergenerational resources and tools to help managers understand how to work with HR and employees to address productivity issues and lead more effectively across the generations (Marriott).
Recruitment Retention	• Creating a welcoming environment through customized onboarding to engage and retain Millennial new hires in an organization where the average age is 47 and the majority of new hires are mid-career and beyond (MITRE Corporation).
Employee Engagement Customer Service	• Establishing CEO advisory councils with new hire Millennials to strengthen engagement and provide a vehicle for input on marketing and new product development (Dell, MITRE Corporation).
Recruitment Retention Employee Engagement	• Providing executive sponsorship and financial support to launch generational employee resource groups to strengthen recruitment, retention, networking, career development, and community involvement efforts (Dell, GSK, Wells Fargo).
Corporate Culture	• Engaging retirees in new, multi-faceted ways to retain institutional involvement and knowledge (Cornell).

Key Discovery #5

Each organization's promising practice featured some aspect of **socialization as a key component.**

This final report theme – socialization – was evidenced in each of the business case drivers highlighted previously. While socialization was not the primary driver of any of the employers' promising practices, it is a key component of each approach.

The following Case Studies incorporate socialization in several different ways:

- Holding separate new hire orientations for younger workers to enhance networking.

- Connecting retirees through shared volunteer experiences.

- Formalizing networking opportunities.

- Bringing people together in small groups face-to-face with the CEO to share ideas.

- Working in generational teams to get the job done more efficiently.

Case Study: Cornell University

ORGANIZATION INFORMATION

Brief company description	Cornell University's combination of joint identities is unique among leading institutions of higher education—it is the federal land-grant institution of New York State, a privately endowed university, a member of the Ivy League, and a partner of the State University of New York. The University is dedicated to its original mission of accessibility and opportunity, outreach, and public service.
Type of organization	Research-based University
Main campus location	Ithaca, NY
Size of workforce	United States: 12,520
Average age of U.S. workforce	45.7 years

PROMISING PRACTICE AT A GLANCE

Name of initiative	Encore Cornell
Description	A suite of programs designed to meet the diverse lifestyles of our retirees while fostering a continuing relationship with Cornell.
Target population	Retirees
Launch date	December 2009

DIVERSITY AND INCLUSION STRATEGY

"In 1865, Ezra Cornell and Andrew Dickson White founded Cornell University on the principle of inclusiveness; providing education to all regardless of race, gender, religion, economic status, or occupational aspiration. 'I would found an institution where any person can find instruction in any study,' wrote Cornell, voicing what would become the mission of the University he endowed."[9]
~ Cornell Website

The University was founded on diversity principles. In January 2000, Cornell communicated a Statement on Diversity and Inclusiveness, "Open Doors, Open Hearts, and Open Minds." This action reaffirmed the University's commitment to increasing the diversity of staff, faculty, and students, and ensuring a welcoming, inclusive environment.[10] Today, Cornell's diversity perspective is holistic and incorporates all of the ways an individual can be different, including race, gender, sexual orientation, disabilities, and veteran status. While no formal age diversity strategy has been developed, Cornell is starting to consider age as a diversity imperative as more than half of its staff and faculty members are now aged 45 and older.[11a,11b]

Cornell's Commitment to Diversity

"Cornell is committed to extending its legacy of recruiting a heterogeneous faculty, student body, and staff; fostering a climate that doesn't just tolerate differences but treasures them; and providing rich opportunities for learning from those differences. To that end, each of Cornell's constituent assemblies endorsed the Statement on Diversity and Inclusiveness, 'Open Doors, Open Hearts, and Open Minds.' The current site is designed to let you know what we are doing, how we are doing and how you can get involved."
~ Cornell Website
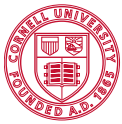
BUSINESS CASE FOR AGE DIVERSITY INITIATIVE

As part of a research-based University, Cornell Human Resources is in a constant benchmarking and discovery mode. Recently, over a three-year period, the team reviewed its age demographics, conducted benchmarking, and researched diversity literature with an emphasis on age. Through this work, Cornell identified the pace at which its workforce was aging and the potential impact faculty and staff retirements would have on the University over the next decade. They recommended various initiatives believed to be critical to addressing multigenerational issues in the near future. The University's five-year Strategic Plan (2010-2015) includes age-related diversity priorities and acknowledges throughout that their workforce is aging and that retirement will have a critical impact.

Gen 2020

Unique to higher education institutions is the cadre of students served in addition to employed faculty and staff.
This creates a fifth generation on campus who must be included in any discussion of the multigenerational workforce.
Gen 2020 is the next wave of young people following Gen Y into the workplace—those born around 2000 and entering college by 2020.[12]

In 2009, the University offered a one-time staff retirement incentive program to employees aged 55 and older with 10 or more years of service. Of the eligible pool of 1,300 employees, 432 took retirement under the program.[12] This result prompted the HR team to conduct further analysis of its retirement forecast, resulting in the projection that half of the current faculty and staff could retire in the next eight to ten years.

The critical question became, "What will the organization look like in the future and how will we combat brain drain and transfer knowledge?" At the same time these questions were being asked, the economy was in the midst of its downward spiral, reminding the HR team that the research was clear and the challenge was to do something about their aging workforce. Encore Cornell was one of their new initiatives.

IMPLEMENTATION

Cornell believed their retiree population would increasingly become an invaluable group in helping the University by sharing knowledge and skills. Retirees know the organization and can become engaged in short-term project work with little, if any, training. How could they tap into retiree expertise? What innovations and model practices did organizations already have in place that they could learn from? What solutions would external associations specializing in the aging workforce recommend? While Cornell had a successful and long-standing Retirees Association, the HR team wanted to do more.

Engaging a recent University retiree to conduct benchmarking and connect with AARP and other influential external groups resulted in little information. Armed with their research, anecdotal feedback, and previous focus groups and survey data, Cornell designed and launched Encore Cornell, a suite of programs designed to meet the diverse lifestyles of retirees while fostering a continuing relationship with Cornell. The suite was launched in December 2009 and includes Encore Hire, Encore On-Call, Encore Volunteer, and Encore & More.[13]

ENCORE HIRE
Encore Hire provides resources to link retirees to temporary employment opportunities inside Cornell that can be completed in two months or less, often remotely. Encore Hire also provides links to opportunities in the community and job search resources.

ENCORE ON-CALL
Encore On-Call offers retirees opportunities to volunteer their expertise on demand with members of the Cornell community. Departments contact retirees to consult with them about a particular project or other need. The retiree's involvement might be answering one question in a brief phone call, or more involved assistance.

When staff or faculty members announce their retirement plans, information about Encore Cornell is provided. If retirees are interested in Encore Hire or Encore On-Call, they provide their contact information to HR. Managers can access a list of interested retirees, their areas of expertise, and contact information.
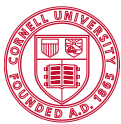
Retirees can also sign up for Encore On-Call online and select ways they would be interested in helping the Cornell Community including:

- Serving as a mentor within their area(s) of expertise;
- Providing answers to quick questions within area(s) of expertise;
- Giving a talk/lecture on area(s) of expertise; or
- Serving as a Cornell ambassador at an event/activity.

If retirees indicate an interest in mentoring, they are asked if they would be willing to devote at least two hours per month mentoring a current Cornell staff member. Interested retirees are also asked to indicate the ways in which they prefer to perform the activities selected, whether in person, on the phone, online through email, or online through an interactive method.[14]

ENCORE VOLUNTEER

Encore Volunteer connects retirees with their communities for a wide range of local and national volunteer opportunities that are run through Cornell and local agencies. Retirees can access a list of needs for volunteers on the University's website. They can also complete an online form to indicate their areas of volunteer interest and receive more information about opportunities.

ENCORE & MORE

Encore & More is a robust website with information and resources for retirees on upcoming events, Cornell resources and links to external organizations. The site also includes archived webinars, such as: *Identity Theft, Job Search Skills for Retirees, and Tips for Telecommuters: Setting up an Effective Workspace.*

MOVING FORWARD

The full impact of Encore Cornell is yet to be determined. Encore Cornell is an innovative program from which the HR leadership team at Cornell expects to learn from retirees' experiences and remain flexible with their offerings. Regular pulse surveys will provide critical program feedback. The following are ongoing activities regarding age diversity in general:

- Cornell's various colleges and administrative units are now charged with reviewing their demographics and developing strategic diversity plans with age as a consideration.

- HR is reviewing EEO reports and further sorting each racial group by age, realizing that generation has a huge impact on life experiences, perspectives, and expectations of the workplace. These analyses are critical as they develop diversity priorities for different populations.

- Among its Workforce Diversity & Inclusion Goals for 2010-2011, Cornell is focused on developing a comprehensive generational diversity strategy that incorporates the needs of retirees, and includes:

  » Researching and analyzing trends in employment needs of Gen 2020, Gen Y, Gen X, Baby Boomers, and Traditionalists; and developing recommendations to address needs.

  » Benchmarking elder care programs; developing recommendations; and piloting implementation of one component of the strategy.

  » Implementing expansion of retiree programming and retiree connections.

  » Developing a strategy for the Connect Care program tailored to the needs of each generational group. The program will offer community support for those who are new to the area and do not have a support network when they are sick, or need to get to the grocery store, for example. They will be able to call Connect Care and a volunteer will be sent to help. Cornell is considering engaging retirees and high school and college students in the program as volunteers.

  » Reviewing existing policies to determine if there is a need for revision or addition.[11a]

As Cornell develops an age diversity strategy, several challenges are on the horizon for the University. First of all, education and awareness are of top priority. Getting the right information out to decision-makers about generational diversity and what Cornell needs to do differently is critical. Secondly, as initiatives continue to be launched and awareness of generational perspectives is heightened, line managers may need to change the way they have traditionally managed employees. Finally, in addressing generational issues and communicating retiree initiatives, the Cornell team is mindful of remaining sensitive to younger employees while continuing to remind everyone of the wealth of initiatives available to all employees throughout their career at Cornell.

Case Study: DELL

ORGANIZATION INFORMATION

Brief company description	Dell listens to customers and delivers worldwide innovative technology, business solutions and services for home, small business and enterprise computing.
Type of organization	Public, for-profit
Corporate headquarters location	Round Rock, TX
Size of workforce	United States: 37,109 Outside of U.S.: 63,767
Average age of U.S. workforce	40 years

PROMISING PRACTICE AT A GLANCE

Name of initiative	GenNext
Description	An employee resource group established to foster Dell's growth and success through networking, product and marketing innovation, professional development, and community involvement.
Target population	Young professionals aged 30 and younger.
Launch date	October 2009

DIVERSITY AND INCLUSION STRATEGY

"Dell believes that in order to be a successful company and a great place to work, our business must be able to leverage the similarities and differences of all team members. At Dell, we define this as diversity – diversity of thinking, leadership, skill set and style – and it is an integral part of our overall business strategy."[15]
~ Dell Website

In 2000, Dell hired its first Chief Diversity Officer and began to focus on underrepresented demographic groups in the United States. Over the past four years, Dell has looked at diversity through a corporate responsibility lens amidst sustainability, environmental, and philanthropic efforts. The current diversity focus is on globalization, generations in the workplace and workforce transformation. Although Dell is viewing diversity with a generational lens, the company has not developed a comprehensive age diversity strategy.

In 2008, Dell established a Global Diversity Council led by the CEO. The council reviews policies, action plans and progress to ensure that the company continues to integrate and leverage diversity throughout their business. The group also consults customers, business partners and employees for global best practices, standards, and feedback.

Dell began discussions about generations in the workforce in 2009. They conducted benchmarking, participated in best practices sharing, and researched the topic to help determine their priorities. The term "age" is not used much at Dell, yet the company believes "age" is a factor in understanding what works and what needs to be done differently in regard to life stages, considering how employees' needs change over time. As Dell researched how to bring different generations together to do their best work, other questions surfaced, such as: *How do you create an environment that enables employees to be successful? How do you drive communications differently?*

While a comprehensive age diversity strategy is not in place, Dell can envision how a strategy might evolve from its work. Current conversations about practices related to the dimensions of age diversity are taking place. The following are some examples:

- At a recent Global Diversity Council meeting, the executive members discussed the need to focus on senior talent to ensure that employees have the ability to shift their career priorities at various stages in life, such as when raising children or caring for elders.

- The sandwich generation—employees who are simultaneously raising children and caring for elderly parents—is looking for opportunities to better manage work and life. Dell is considering ways to enable all employees to ramp their careers up and down based on life stages.

- Dell's HR Diversity and Inclusion team is looking at the generational aspect of diversity and related trends and themes. In 2010, the company filtered its annual employee survey by age, for the first time, to determine generational trends and themes.

- With more acquisitions and mergers, Dell is taking a look at "organizational age." As new employees are assimilated, how can HR help them feel valued and respected?

- Dell has expanded its employee communications about free preventive healthcare screenings and outlined specific tests that are recommended at various ages for women and men.

BUSINESS CASE FOR AGE DIVERSITY INITIATIVE

Amidst ongoing discussions about various aspects of age diversity at Dell, two business needs surfaced that led an employee in HR to envision the development of a new employee resource group— eventually called GenNext—that would:

- Ensure that the voice of young professionals, aged 30 and younger, is considered in how Dell does business.

- Build an inclusive culture for the younger population.

Dell Employee Resource Group - Value Proposition

Company Benefits:
- Employee retention & engagement
- Talent acquisition
- Talent development

Employee Benefits:
- Networking, sense of community
- Professional & personal growth opportunities
- Leadership & skills development

Business Alignment:
- Marketing strategies
- New product development
- Policy development[16]

Until recently all employee resource groups at Dell have been born from grassroots efforts, none had been spearheaded by HR. Today, new employee resource groups must go through a process to gain approval and sponsorship from Dell leadership. A small group of young professionals helped conduct the background research and build the business case to launch GenNext at Dell's headquarters. Their work involved reviewing the literature, best practices and available internal data, and demonstrating the value proposition to the business and members. They also were charged with ensuring that the group's proposed objectives aligned with Dell's strategic business and people priorities, such as globalization, representation, and inclusive culture.

IMPLEMENTATION

The process for GenNext to become chartered and approved was long and challenging because the grassroots individuals involved wanted to ensure due diligence with the research. When they began, it had been seven years since a new employee resource group had formed in the United States. The internal and external research was extensive. Market dynamics were analyzed to determine how young professionals were impacting business and how that was relevant to Dell. When the business case was shared with leadership, there was no resistance and the group launched in October 2009.

Formal objectives for GenNext were developed to foster growth and success at Dell through:
- Networking
- Product and marketing innovation
- Professional development
- Community involvement

Dell's CEO immediately took a particular interest in GenNext and continues to seek input from the group on product and marketing innovation. For example, he asked members to test Dell's new tablet/phone, called Dell Streak, to gain the young professional's viewpoint during the development and launch of the product. He put the prototype in their hands and asked that they use it as their primary device and provide feedback directly to him on their experiences with the product. The CEO also asked GenNext to test Chatter—a new collaboration and social media tool—and provide feedback prior to its use being authorized at Dell.

Dell has established a formal scorecard to measure the effectiveness of each employee resource group. The scorecard includes metrics in the areas of employee development and retention, acquisition of talent, network and awareness, membership engagement, community involvement, and executive leadership team participation. While metrics of success are not yet available for this newly launched group, in less than one year GenNext has grown to 800 members in a single chapter across the United States. Dell expects continued growth of chapters in the U.S. by the end of 2011.

The company has launched a curriculum of professional development courses, an MBA forum, executive speaker series, brown bag lunches, and speed networking with executives and other young professionals. In addition, the company is expanding globally as GenNext leaders have targeted one city in each region to pilot a chapter; new groups are already being formed in India, Morocco and Panama, with an additional three chapters to launch in Panama and Brazil by the end of 2011.

The time commitment to research and launch GenNext has been great and caused some growing pains. Additionally, the global expansion happened quickly and Dell soon learned that a more thoughtful approach was needed to ensure solid organization and executive sponsorship in each location.

MOVING FORWARD

Diversity and inclusion is a core component of Dell's people strategy. In the future, age will continue to be an element of their focus. Whether a formal age diversity strategy will be developed is unknown. However, the work continues and, in the next year, Dell expects to focus on several activities that have, or may have, an age component, including:

- Grassroots launch of an ERG for employees over age 40. Since GenNext formed, employees have expressed an interest in a group for older professionals; the company is still monitoring this space.

- Development of a strategic communications plan based on an understanding of how employees prefer to get company information, which is often different by generation.

- Review of 2010 Census which includes an age element. What can Dell learn from the results?

- Renewed, comprehensive review of university relations strategy.

- Assessment of leadership pipeline strategy to understand what can be done differently to really grow, develop, and build senior leaders.

Case Study: gsk GlaxoSmithKline

ORGANIZATION INFORMATION

Brief company description	GlaxoSmithKline's (GSK) mission is to improve the quality of human life by enabling people to do more, feel better and live longer. A research-based pharmaceutical company, they employ people in over 100 countries.
Type of organization	Public, for-profit
Corporate headquarters location	United Kingdom
Size of workforce	United States: 24,000 Outside of U.S.: 75,000
Average age of U.S. workforce	44.4 years

PROMISING PRACTICE AT A GLANCE

Name of initiative	Prime Time Partners (PTP) Employee Resource Group
Description	Voluntary, self-governing group that creates supportive network for employees, leverages knowledge and experience to develop and mentor employees of all generations, increases awareness of issues in the mature marketplace, and promotes cross-generational understanding.
Target population	Mid-to-late career
Launch date	July 2006

DIVERSITY AND INCLUSION STRATEGY

"Imagine what it would be like if our people could find a cure for cancer. Or an effective vaccination for HIV and AIDS. Or a medicine that could protect against heart disease or stroke. The unique and diverse talent of our workforce has already allowed us to make breakthroughs that have saved millions of lives, and helped improve countless others."
~ Diversity and Inclusion at GSK brochure

GlaxoSmithKline believes that managing and leveraging diversity and inclusion opens doors to innovation—the cornerstone to ensuring that everyone has access to the medicines and products they need. In August 2009, the GSK Corporate Executive Team agreed on a framework to build employee diversity and inclusion activities into all business plans. This includes:

- Generating talent management and succession plans using a diversity and inclusion lens.
- Supporting equality and inclusion around pay and career opportunities.
- Promoting mentoring throughout business and highlighting the value of mentoring someone "different."
- Promoting and supporting flexible thinking in relation to working practices and culture.
- Building trust. Integrating with the "Trust Tower"—values, people and workplace as a responsible employer.

While GSK has a strong strategic focus on talent management using a diversity and inclusion lens, the company views age diversity primarily as a compliance element. About four years ago, a global team researched generational issues employees were facing throughout their careers and evaluated the impact on recruitment and retention. The team discovered that age diversity issues were not having a significant impact on any geography, except in countries with more rapidly aging populations, such as Australia and Germany. As a result, age diversity—beyond compliance—is not a strategic imperative in the U.S. However, initiatives with an age dimension, such as Prime Time Partners (PTP) have been launched.

BUSINESS CASE FOR AGE DIVERSITY INITIATIVE

In 2006, nearly 50% of GSK employees in the U.S. were Baby Boomers or older. As the company analyzed the impact of having four generations in the workplace, they observed key differences in how employees from different generations performed the same job. One employee in particular noticed this difference in her call center where standard questions are used by all customer representatives, but with different approaches.

Following a Lunch & Learn session about employee resource groups, this call center employee and her colleagues realized a gap existed—there was no resource group for older workers. The employees saw an opportunity to offer networking and mentoring, and to heighten awareness among their colleagues of generational differences in the workplace. They formed a grassroots employee effort to research the needs of those in mid-to-late careers and prepared the business case.

IMPLEMENTATION

GSK's 2010 update to its corporate responsibility report addressed the business case for employee networks. "GSK actively supports employee resource groups (also known as networks) to encourage professional growth and provide a forum where people with similar interests or backgrounds can meet, discuss shared experiences and work together to help make the company a more inclusive workplace. This helps engage and empower employees beyond their day-to-day responsibilities. In addition, resource groups provide GSK managers with views and insights on diversity and help our media and marketing teams better understand our diverse customers and stakeholders."[17]

The grassroots team enlisted an executive sponsor and followed the company guidelines to establish a Prime Time Partners (PTP) steering committee whose first task was to help create a charter with a mission statement, objectives, goals, and budget. In the summer of 2006, after six months of planning and organizing, the group held its pre-launch event with 50 employees in attendance. In the fall of 2006, GSK's former CEO (then Vice Chairman of Pharmaceuticals) spoke at the formal launch event about how he "failed retirement" with 200 employees in attendance.

Recently, a section of the company's intranet was redesigned to include an Employee Resource Group Community where each group can post information about the group's mission, objectives and upcoming events, along with resources, videos, podcasts, and links. These events and resources are open to all employees.

The intranet site includes the Prime Time Partners formal mission statement and objectives:

Mission

- Add value to the business by creating a positive and supportive network for GSK employees in mid-career and beyond.
- Become a key resource to leverage knowledge and experience in developing and mentoring these generations and other GSK employees.
- Champion the experience of aging and partnering with GSK to increase awareness and understanding of issues and concerns in the mature marketplace.
- Promote cross-generational understanding, cooperation and co-mentoring among GSK employees.

Objectives

- To prepare for the transfer of knowledge from mature workers prior to retirement to legacy employees.
- To offer information for planning the transition to a different phase of life, another career, or retirement.
- To identify important resources that may be shared among employees, customers and external stakeholders.
- To help identify and prevent ageism.
- To maximize knowledge transfer before the "Brain Drain" occurs.

In addition to being a valuable resource to the business by providing input on marketing and advertising, and recruitment and retention, PTP has provided numerous opportunities for its members' professional and personal growth. Examples of recent events include:

- In-depth financial and retirement workshops to understand GSK benefits, Social Security and Medicare;
- Investment planning sessions by financial advisors, presentations by popular authors/experts on generational issues and other relevant speaker events;
- Networking opportunities at regular PTP meetings;
- Mentoring and career development sessions;
- Reverse mentoring through a social networking presentation by the Early Career Network; and
- Healthcare seminars and resource fairs highlighting prevention, intervention, and innovation.

All Employee Networks at GSK are also involved in community outreach. For the past three years, PTP has partnered with Resources for Seniors to sponsor a winter Holiday Dreams program for elderly community members in Wake County, North Carolina. In 2010 the Early Career Network joined Prime Time Partners to co-sponsor the program. They adopted 15 people whose average ages were 85 and older to fulfill their humble wish lists. This effort has led to other in-house divisions and departments becoming involved in Holiday Dreams.

MOVING FORWARD

PTP has evolved to become the largest of GSK's employee networks with 800 members in their Research Triangle Park, NC location. Other chapters have launched in Philadelphia, Pittsburgh, and in the consumer healthcare and field sales divisions.

Programs offered by the group have focused primarily on meeting the specific needs identified by employees in surveys. Moving forward the group is looking more closely at how they can become better advocates for the business by providing input on its interface with older communities.

Prior to launching PTP, there were several long-standing employee networks in place based on ethnic, gender and sexual orientation diversity. It had been several years since a new network had formed; launching a group focused on generational diversity was a new concept for GSK. As a result, completing the necessary steps to form a company-sponsored group took some time. Armed with this experience, PTP members have mentored other groups, most recently the Veterans and Cancer Support Networks.

GSK primarily measures the success of PTP by membership, which tops 800 employees, and program attendance, which averages 75 to 100 employees per event. This past year, amidst layoffs and retirement packages, many retiring employees expressed their appreciation to PTP for helping them better prepare for retirement. In 2007, a PTP member survey found that the vast majority were satisfied with the network, and as a result of their participation, experienced increased satisfaction with their jobs and with GSK as an employer.

Case Study: Marriott®

ORGANIZATION INFORMATION

Brief company description	Marriott International is a leading lodging company with more than 3,600 lodging properties in 71 countries and territories.
Type of organization	Public, for-profit
Corporate headquarters location	Bethesda, Maryland
Size of workforce	United States: 108,000 Outside of U.S.: 25,000
Average age of U.S. workforce	39 years

PROMISING PRACTICE AT A GLANCE

Name of initiative	Aging Workforce Project and Intergenerational Toolkit for Managers
Description	Comprehensive, multi-phase project to: • Identify aging workforce issues; • Develop the business case; • Create a long-term strategic plan; and • Implement short-term, long-term and proactive solutions. This case study reviews the overall project, and the first solution developed as a result.
Target population	Research component: Mature associates Specific solution: Toolkit for managers to use with all generations.
Launch date	Project: June 2006 Toolkit: July 2008

DIVERSITY AND INCLUSION STRATEGY

"...Marriott recognizes that our most important asset is our global workforce who creates the experiences that keep our guests coming back. Our philosophy of 'taking care of our associates so they can take care of our guests' is the foundation of our business. We devote a great deal of attention to hiring, engaging and retaining the right people. We offer a work environment that encourages personal and professional growth and where associates are rewarded for and have access to services that support their well-being. Furthermore, our associates form the foundation of our environmental and social partnerships." [18]
~ Marriott Sustainability Report, 2008-2009

Marriott believes that a diverse and inclusive environment strengthens the company's culture and provides a competitive advantage. In fact, in 1989 Marriott was the first hospitality company to establish a formal diversity program. The company's Diversity and Inclusion strategy encompasses five areas of focus: Workforce, Customers, Owners, Suppliers, and Company Recognition. Age diversity is an imperative within Marriott's strategy. As a result of the findings and analysis of work that helped launch the promising practice featured in this case study, Marriott will continue to consider the needs of the mature worker in the design and development of new initiatives.

Marriott has one of the most diverse workforces in corporate America; associates[19] in the United States hail from dozens of nations and speak more than 50 languages. More than 60% of associates are minorities and more than half are women. Diversity and inclusion efforts at Marriott are driven by the Committee for Excellence, established in 2003 by J.W. Marriott, Jr., Chairman and CEO, and led by members of Marriott's board of directors and senior executives. The Committee focuses exclusively on expanding diversity internally and externally and providing an inclusive work environment that values people of different backgrounds, experiences, and cultures.

Marriott's Regional Diversity and Inclusion Councils support the work of the Committee for Excellence, ensuring that their diversity and inclusion strategy is implemented in the local markets. Much of the Councils' efforts are devoted to attracting, developing, and maintaining management talent through hosting networking events and women and minority leadership conferences, interacting with campuses, providing classroom presentations, participating in associate conferences and meetings, and mentoring. Other key activities include helping to implement language development programs, launch work-life programs, promote supplier diversity efforts, and provide scholarships.
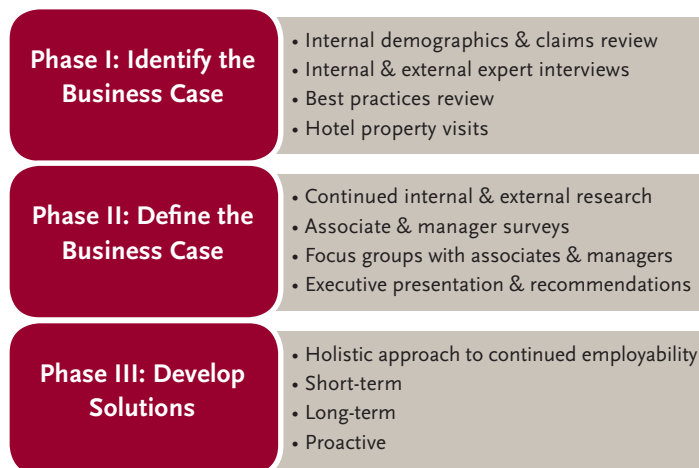
BUSINESS CASE FOR AGE DIVERSITY INITIATIVE

Marriott's U.S. workforce is younger overall than the national average, but its associates across functional areas are aging at a more rapid rate. In the five years prior to launching the Aging Workforce Project in 2006, the percentage of Marriott associates, aged 45 to 54, had increased by 26% and the percentage of associates aged 55 and older had increased by 44%. Currently, 41% of the workforce is aged 45 and older. In housekeeping, a job that requires physical work, many are aged 50 and older. With long tenures, these associates are committed and loyal, and plan to stay on the job for years to come. Marriott wanted to learn more about the challenges faced by these "mature workers" and what resources they needed to stay engaged and productive on the job.

In June 2006, with executive-level support, Marriott embarked on the comprehensive, multi-phased Aging Workforce Project to identify associate and manager challenges and determine what resources were needed to develop a business case and create a long-term strategic plan (see Figure 5).[20]

Figure 5:   Multi-phased Aging Workforce Project

Phase I: Identify the Business Case	• Internal demographics & claims review • Internal & external expert interviews • Best practices review • Hotel property visits
Phase II: Define the Business Case	• Continued internal & external research • Associate & manager surveys • Focus groups with associates & managers • Executive presentation & recommendations
Phase III: Develop Solutions	• Holistic approach to continued employability • Short-term • Long-term • Proactive

The work accomplished in Phases I and II enabled Marriott to develop a strong business case for solution implementation. Through research, interviews, surveys, and focus groups with mature associates and their managers, key opportunities were identified in the areas of productivity on the job, financial planning, health and wellness, dependent care, and knowledge of available resources, to name a few.

SURVEYS AND FOCUS GROUPS

Thirty-six focus groups were conducted at Marriott hotel properties across the United States with Spanish, Chinese, and Creole translators as needed. Separate groups were conducted with mature housekeeping associates, other mature hourly associates, and managers of all ages who had older associates reporting to them.

Prior to the start of each focus group, participants completed a 24-item work-life questionnaire translated into multiple languages. The purpose of the questionnaire was to gather basic demographic and work-life data to supplement focus group feedback. The six areas of discussion covered in all focus groups were as follows: [20]

> *Work Environment*
>
> *Health & Wellness*
>
> *Dependent Care*
>
> *Financial Security*
>
> *Managing a Mature Workforce*
>
> *Program Awareness and Utilization*

IMPLEMENTATION

Through the Aging Workforce Project, Marriott discovered that the challenges facing mature workers were not particularly different from those faced by other age groups, only at times more pronounced or chronic. This unexpected realization resulted in a fundamental shift in project objectives from seeking an aging workforce solution only, to creating a holistic intergenerational approach for all HR-related projects.

It also became clear to Marriott that they needed to equip managers with the necessary resources to successfully lead multigenerational teams. In response, the Intergenerational Toolkit for Managers was developed with assistance from Marriott's Assistance and Resources for Life (myARL) employee assistance program vendor, and HR representatives and managers at various hotel properties. Marriott used the information shared during focus groups to create resources that address the key workplace issues and challenges. The toolkit is posted on the company's intranet and myARL site, and includes:

- **A series of articles** on how to manage performance issues and promote a healthy, productive workforce across generations.
- **Audio scenarios** featuring Marriott managers and HR directors sharing real stories of challenges and collaborative solutions for a range of workplace situations related to productivity, absenteeism, and health and wellness.
- **Audio clips** featuring experts discussing ADA and ADEA and implications in the workplace.
- **Companion discussion guide** for each audio scenario to help managers facilitate topical discussions during staff meetings or other associate gatherings.
- **Information and links** to manager consultation lines and related intergenerational resources.

MOVING FORWARD

Marriott's solutions phase has shifted from an "aging workforce" approach to an "intergenerational" approach. However, as new workforce benefits and other initiatives are developed throughout the company, each is reviewed by the Workforce Effectiveness and Diversity department to identify and address any impact the new policy, program or practice might have on mature associates.

Moving forward, Marriott has outlined many solutions (including future considerations) and development is ongoing in all areas: short-term, long-term and proactive (see Figure 6).[20] As with any new initiative in difficult economic times, cost can be a concern. Focusing broadly on intergenerational issues has a significant cost impact on a global company the size of Marriott. The discussion continues—how do you approach age diversity solutions in a manner where everyone benefits while scaling the solutions to manage costs?

Figure 6: Intergenerational Solutions to Workforce Challenges

Short-term Immediate Deliverable	Long-term 3-5 Year Plan	Proactive Holistic Approach
Intergenerational Manager Toolkit • Articles • Audio stories • Expert information on ADA/ADEA • Management consultation • Links to other resources **Innovative Scheduling Options** • Fixed and guaranteed scheduling • Hourly flex options • Buddy system • Associate input in scheduling **Flexible Work Offerings** • Teamwork Innovations • Teleworking pilot program at corporate headquarters • Incorporate more broad based flexibility	**Work Redesign – Brand Initiative** • Process analysis & change • Scheduling review • Pilot programs *Future consideration:* • Equipment review **Skill Building** • Enhanced technology training • Cross-training and utilization • Enhanced schedule optimization *Future consideration:* • Internal/external transition options **Dependent Care** *Future considerations:* • Evaluate needs/support options • Determine business case for additional resources	**Health and Wellness** • Health Risk Assessment and incentives • Preventative care and incentives • On-site fitness and wellness programs *Future consideration:* • Ergonomic equipment upgrades **Language & Literacy** • Sed de Saber™ • Rosetta Stone® **Financial Education** • Financial literacy series *Future considerations:* • Length of service info packets and consultation • Formal retirement planning

Case Study: MITRE

ORGANIZATION INFORMATION

Brief company description	MITRE Corporation is engaged in scientific and technical activities and manages federally funded Research and Development Centers for the Department of Defense, Federal Aviation Administration, Internal Revenue Service, U.S. Department of Veterans Affairs, and Department of Homeland Security.
Type of organization	Independent, not-for-profit
Corporate office locations	Bedford, Mass.; McLean, Va.; and 60 sites around the world
Size of workforce	United States: 7,000 Outside of U.S.: 60-75 expatriates
Average age of U.S. workforce	47 years

PROMISING PRACTICE AT A GLANCE

Name of initiative	Workforce of the Future
Description	Organization-wide focus on recruiting, welcoming, engaging, and retaining Millennial and Gen X recent graduates who have the latest technology skills.
Target population	Millennials (primarily) and Gen Xers
Launch date	2007

DIVERSITY AND INCLUSION STRATEGY

"MITRE's world-class workforce represents a wide range of cultures, skills, backgrounds, cognitive styles, and other aspects of diversity. MITRE works to create an inclusive culture that doesn't just accommodate but leverages that diversity to create better solutions for our sponsors and a stronger future for the company." [21]
~ MITRE Website

As a national technology resource, MITRE works in partnership with the federal government to address issues of critical national importance that require a unique combination of systems engineering and information technology. They work to develop innovative solutions to some of the government's most complex technological challenges. MITRE representatives believe that having a diverse and inclusive workforce enables them to accomplish their mission. Their website lists a vast number of diversity dimensions—including age—that are communicated as critical to the job externally and celebrated internally.

MITRE established a Corporate Diversity Action Council to embed the organization's commitment to diversity and inclusion into their work programs. The Council works through three committees to achieve its goals:

- Workforce Committee supports MITRE's goal to recruit and retain a workforce that reflects the diversity of its customers and the nation.

- Operations Committee focuses on enhancing and improving MITRE's work programs, products, and operations through the inclusion of diverse staff and thought.

- Education and Awareness Committee supports MITRE's long-standing commitment to creating and maintaining a multicultural workplace where talented individuals can flourish.[21]

MITRE has not established a formal age diversity strategy or specifically defined age beyond the desire to hire more Millennials (primarily) and Gen Xers; however, they have considered many of the dimensions of age. For example, physical age is important because the organization offers a holistic lifecycle approach to employee benefits. Their new "Embrace Your Health" initiative helps employees manage stress, eat right, and exercise. Additional programs are offered to support employees at every stage of their career or life, whether they are raising children, going to school, phasing retirement, or already retired and want to continue working.

MITRE

BUSINESS CASE FOR AGE DIVERSITY INITIATIVES

To solve some of the most complex problems and provide institutional memory for the government, MITRE needs highly skilled professionals. Historically, the company has recruited and hired primarily experienced professionals who have "been there and done that" and who have a passion and commitment to public service. MITRE's benefits structure is set up to encourage intellectual capital to stay. Nearly a decade ago, MITRE started focusing on being a great place to work. As a result, MITRE saw attrition drop from 10% to 4-5% in the past few years, which is well below the national average of 15-16% for high tech.

With the rapid change in technology, MITRE corporate officers initiated the push to actively recruit "digital natives"—those Millennials and young Gen Xers who have grown up with technology and live with it 24/7. Their objective was to recruit and engage young people coming out of college with the latest and greatest skills to help integrate technical solutions to their sponsors' problems.

As MITRE focused on bringing on a younger cadre, they faced an unexpected challenge —the fairly high turnover of younger employees. With 75-80% of new hires still being in mid-career and beyond, younger employees were leaving because they didn't feel welcomed within the company, though at rates below the national average for college recruits.

IMPLEMENTATION

In 2007, to address the high turnover rates among young employees, MITRE corporate officers launched a multi-faceted Workforce of the Future initiative with four key areas: recruitment, onboarding, networking, and executive interaction.

RECRUITMENT
To appeal to new graduates, MITRE promoted its Workforce of the Future on its website, offering a unique way to explore MITRE's work programs and career opportunities for a "Job of Honor." An interactive 3D video game simulates real MITRE work challenges. For example, players can test their engineering skills and design a control interface for an unmanned aircraft, and use those controls to pilot the aircraft through a hair-raising test flight. Later in the game, they can demonstrate their cyber-sleuthing skills by tracking down a fugitive bank robber.

ONBOARDING
One imperative is to ensure that younger new hires see others like themselves in the organization and have opportunities to network with each other. Recently, MITRE created a separate new hire orientation that is tailored to younger employees and includes opportunities to network.

NETWORKING
MITRE has strong co-op[22] and intern programs and has recently enhanced programming for networking opportunities. For example, this past summer a series of events was offered to co-ops and interns including:

- HR facilitated, interactive workshop to help them understand networking at MITRE—how to network, why it's important and how to get things done.

- Lab tour of the centers to learn about other parts of company.

- Community service project organized by co-op and intern committees.

- Summer send-off ice cream social at all sites. Those working remotely were invited to a teleconference social event.

EXECUTIVE INTERACTION
To help Millennial new hires feel valued and to offer them an opportunity to provide feedback directly to senior leadership, MITRE hosts CEO lunches during employees' first year on the job. In this informal setting, the CEO personally welcomes the new hires and takes the time to learn firsthand about their experiences with the onboarding process and the job. General Managers also host similar forums.

In September 2009, the company launched a Millennial Advisory Board, comprised of up to 18 Millennials holding entry-level positions. The CEO holds open-forum, quarterly meetings with the advisory board to provide another opportunity to keep his finger on the pulse of new Millennial hires. This past year, eight advisory board meetings were held in two main company locations. Meeting minutes are placed on a community share page and a listserv enables the dialogue to continue throughout the year. For now, the advisory board members are a static group. The CEO wanted to create a working group in a face-to-face environment where people would get to know each other over time and feel comfortable sharing in an honest and open exchange.

MITRE

HR participates in advisory board follow-up meetings to review actionable items based on the board's input. Recent changes include welcoming new hires by name in Monday morning emails sent to all employees, and implementing networking events similar to those offered to co-ops and interns.

MOVING FORWARD

When the push began to recruit and hire Millennials, some work had to be done to convince management that this was a useful and productive move. With an average age of 47, the organization primarily hired people with decades of experience. Managers expressed some concern about younger employees' ability to fit in. Changing this mindset was difficult, but MITRE believes it has successfully conquered this challenge. Moving forward, MITRE is focused on encouraging students' interest in science, technology, engineering, and math (STEM) subjects.

Because of the highly classified work projects MITRE employees complete for federal government sponsors, they must be born in the U.S. to be eligible for the required security clearances. While college recruiting is strong, MITRE is concerned about the student pipeline and level of interest in STEM subjects in the early grades. MITRE is working with K-12 teachers as summer interns, helping them get excited about these subjects so they can take that energy back to their classrooms.

MITRE is also considering implementing a formal reverse mentoring program. This would acknowledge that young, digital natives have much to offer older workers in regard to efficiency, use of technology and perspectives on the rapidly changing world.

Over the years, MITRE has been recognized as a leader in developing age diversity initiatives for older workers, in particular. Two of their award-winning initiatives are ongoing:

Reserves at the Ready

Designed initially for and marketed to employees who were retiring, Reserves at the Ready has expanded to offer part-time, on-call positions for current employees who have the skills and corporate memory to provide dynamic, short-term project support. About 300 people participate and most are retirees.

Phased Retirement

MITRE has developed a formal Phased Retirement Program for regular part-time and full-time employees who wish to transition to retirement. Employees accepted into this program may work either in regular part-time status (20 or more hours per week but no more than 32 hours) or in part-time, on-call status (generally less than 20 hours per week). Participating employees may also collect partial benefits from the MITRE Retirement Program.

Case Study: WELLS FARGO

ORGANIZATION INFORMATION

Brief company description	Wells Fargo & Company is a diversified financial services company providing banking, insurance, investments, mortgage, and consumer and commercial finance through more than 10,000 stores, 12,000 ATMs and the Internet across North America and internationally.
Type of organization	Public, for-profit
Corporate headquarters location	San Francisco, CA
Size of workforce	United States: 270,286 [NOTE: The USA includes Guam, Puerto Rico and Saipan in the Northern Marinas Islands] Outside of U.S.: 2,966
Average age of U.S. workforce	39.78 years

PROMISING PRACTICE AT A GLANCE

Name of initiative	Boomers Network and Young Professionals Network
Description	Employee resource groups (called "Team Member[23] Networks" at Wells Fargo) with formal objectives: professional development, education and awareness, community service, and business resource.
Target population	Baby Boomers and young professionals
Launch date	Boomers Network: 2006 Young Professionals Network: 2007

DIVERSITY AND INCLUSION STRATEGY

"Wells Fargo Team Members should expect to work in an environment where each person feels valued for individual traits, skills and talents, and has the opportunity to fulfill ambitions and contribute to the success of the company."
~ Wells Fargo Diversity Mission[24]

To help accomplish their goal to become one of the world's truly great companies, Wells Fargo believe they must "integrate diversity into all we do for all our stakeholders."[24] The company's diversity and inclusion strategies focus on five areas: diverse representation, talent management and development, inclusive environment, business practices, and measurement and accountability. Wells Fargo considers age a diversity imperative along with many other aspects of diversity.

The company describes its initial approach to diversity as "very traditional" with a focus on gender and recruiting women. Later on, its focus incorporated diversity of culture, ethnicity and sexual orientation. Recently, HR leaders shifted to a diversity and inclusion approach with age diversity becoming a part of the mix. Wells Fargo's approach to age is holistic and focused on the continuum of life. On their career page it states, "We hire and retain team members who are diverse in age, education, ethnic origin, lifestyle, ability, race, religion, and sexual orientation."

With a focus on creating an inclusive environment, Wells Fargo's commitment to diversity is owned by the CEO and executive leaders who support the following:

- **Enterprise Diversity Council**, with members from every business line, advises staff and the executive management committee on policy, programs, culture, and leadership best practices.

- **Business Line Diversity Council** advises managers on policy, programs, culture, and leadership best practices.

- **Team Member Networks** align with corporate strategy and are devoted to professional growth and education, community outreach, recruiting and retention, supporting business development, and customer insight. Each of the company's 52 networks in the Great Lakes Region is organized by individuals who are connected by a shared background, experience, or other affinity.

While all team member networks are inclusive, the Boomers Network and Young Professionals Network were launched to bring together those with similar experiences based on their chronological or generational age and career stage.

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19 "Team member" is Wells Fargo's term for its employees and is used as such throughout this case study.

20 https://www.wellsfargo.com/about/diversity/importance/case

21 Ibid.

BUSINESS CASE OF AGE DIVERSITY STRATEGY

Historically, Wells Fargo has focused its diversity efforts in the areas of ethnic and cultural diversity and gender. Although its corporate strategy is based on a holistic approach to diversity, in reality, the market influences its response. One of the challenges Wells Fargo faces, particularly as HR leaders look at aging and its impact on team members, is the company's own demographics. Overall, their workforce is young with Millennials (born 1981-2000) often comprising more than half of the team members in a particular region. In some areas in Indiana and Minnesota, for example, team members are older and the company places a greater focus on age diversity in those regions. Two main drivers—career development and work-life effectiveness—formed the business case for the launch of the Boomers Network and Young Professionals Network:

1. With our nation's current economic challenges, Wells Fargo realized that older workers who were previously looking forward to retirement might change their plans and remain on the job due to personal circumstances. The challenge became finding ways to keep the Boomer population (born 1946 to 1964) engaged. One of the drivers of the Boomers Network grew out of this challenge. The company's Talent Management group was interested in launching a Boomers Network to focus on career development. This focus was of particular interest since one stereotype of Boomers is that they are not interested in career development; the Wells Fargo team believed differently.

2. Another driver of the development of the Boomers Network was work-life effectiveness and specifically the challenges team members face when they are part of the sandwich[25] or triple-decker[26] generation. While Wells Fargo does not know how many team members have these responsibilities, they do know, through surveys and anecdotal stories, that caregiving is an issue.

IMPLEMENTATION

With the push from the Talent Management group, the Boomers Network was formed. Shortly thereafter, young employees said, "What about us?" and launched the Young Professionals Network. Although there are no age restrictions to being a member of either group, most Young Professionals Network members are Millennials (born 1981-2000) or GenXers (born 1965-1980) and most Boomers Network members are of that defined generation (born 1946-1964).

All recognized networks at Wells Fargo are supported from the top, yet led and driven by team members. Each group must gain executive approval and enlist an executive sponsor, officers, and chairs or co-chairs. Objectives of each group must include: professional development, education/awareness, community service, and resources for the business. With a focus on career development, the Networks have worked with Wells Fargo Talent Management to launch two new pilot programs in partnership with St. Catherine's University. The program's philosophy is, "No matter where you are in the continuum of careers, we are there for you."

- **On-Campus Master's Courses**. The company conducted focus groups with the Boomers Network and Young Professionals Network members to determine what leadership courses were of the most interest. This pilot program offers a Custom Graduate Certificate in Organizational Leadership that is fully transferrable into the St. Catherine University degree program. The certificate provides students with the knowledge and skills to improve their organizational leadership abilities. The three certificate courses are offered on-site at Wells Fargo for the Boomers Network and Young Professionals Network members. Tuition reimbursement is available.

- **Leadership Perspectives Course**. This pilot course features a customized career enhancement opportunity for team members. The undergraduate course was designed specifically for Baby Boomers by St. Catherine University's expert faculty. Leadership Perspectives builds on the experiences and leadership of mature professionals who desire to explore leadership and life strategies during mid-life and at any career stage. Participants create a personal leadership map to guide their career and life journey. The map defines short and long-term goals, actions steps, resources, and timelines. For a small fee, participants can also connect with a Life Coach.

MEASURING SUCCESS

Both the Boomers and Young Professionals Networks have been successful. A number of team members in network leadership have advanced their careers through promotions. The company regularly surveys members to determine topic areas of most interest. In 2009, those topics were: retirement planning (63%), networking (56%), healthy lifestyles (54%), career development (53%), issues related to economic downturn (47%), health related issues (44%), and community outreach/volunteering (39%). The most popular seminars in 2009 were: *Four Generations at Wells Fargo, Applying Secrets for Your own Long & Healthy Life, Changing Lanes: The Secret of*

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22 Sandwich generation is simultaneously raising children and caring for elderly parents.

23 Triple-decker generation is simultaneously raising children and caring for elderly parents and grandparents.

Successful Midlife Career Change, As the Cookie Crumbles: Alzheimer's Disease, Don't Just Count Your Money: Make Your Money Count, and Journey into Wellness.

Although the company is considering additional formal metrics, the following are currently tracked:

1. Growth of participation in the Networks.
2. Types of events and satisfaction.
3. Ability to help the business, e.g., providing feedback on different products in development.
4. Volunteer hours and types of initiatives.
5. Leadership development.

> At Wells Fargo, there are 52 Employee Resource Networks in the Great Lakes Region serving 18 different groups including: African Americans; Arab Americans; Asians; Hispanics; Indians; Persian Americans; Native People; Minorities on the Rise; Women; Boomers; Young Professionals; Employees with Disabilities; Gay, Lesbian, Bisexual and Transgender Employees; Veterans; Parents; Stagecoach Speakers; Environmental Green; and Get Fit.

MOVING FORWARD

"For Wells Fargo, age diversity strategy is a journey not a destination. I am excited because we are talking about it; we are looking at ways to be innovative; and we are making progress. By no means are we the experts. Our work is in progress."
~ Philomena Morrissey Satre, Vice President, Diversity & Inclusion, Wells Fargo

Wells Fargo is committed to continuing to develop external partnerships as a way to learn, network and communicate their approach to age diversity. Their focus is on the broader community needs. How can they be a resource and open doors with other companies on the topic of age diversity? Recent actions include collaborating with SHIFT, a non-profit addressing the topic of age, midlife and career transitions. Wells Fargo is also connected with the Governor of Minnesota's Task Force on Aging and Transform 2010, an aging project from a state-wide perspective.

As older workers continue to stay in the workforce, Wells Fargo is considering the need to offer and encourage part-time work to a traditionally full-time workforce. They also recognize the need to focus on age from a lifestyle perspective while integrating health and wellness into their diversity and inclusion and work-life programs. Beyond that the company is exploring different partnerships and tools that help support talent management across the generations.

When Wells Fargo launched the Boomers Network and Young Professionals Network, they had the benefit of learning from other internal team member networks, but did not have the benefit of a benchmarking perspective as no peer companies at the time had similar groups. For others considering launching similar resource groups, Wells Fargo offers the following advice:

- Ensure that executive leadership support and sponsorship is present.

- Hand-select the group's leadership, especially the chair or co-chair.

- Provide financial sponsorship in the form of a budget for each group.

- Ensure that the group's objectives are relevant and align with the business.

- Define the group's priorities. Launching a new group with members who want to do too much can be overwhelming. "Think small; do big."

- Measure success.

- Tell the stories.

The age diversity conversation has started at Wells Fargo. With the economic recovery still in progress, and the company's focus on business issues related to acquisitions and mergers, further deep discussion about age diversity will have to wait.

As they move forward, the company's response to age diversity issues will be driven by diversity leadership in response to benchmarking and trends; customer needs in the way they conduct business or provide products and services; team member feedback on Gallup Q12 surveys; or sponsorships with partners across regions.

CONCLUSION & RECOMMENDATIONS

In the Sloan Center on Aging & Work's report, Age Management: Approaches to Age Diversity at the Workplace (2009),[2] authors Pitt-Catsouphes, Besen, and Matz-Costa, describe how age management initiatives in the workplace enable employers to:

- Promote knowledge transfer,
- Facilitate the acquisition of competencies and skills across the life course,
- Develop the skills and competencies of employees in all career stages,
- Offer choice with regard to flexibility,
- Value diversity/generational differences,
- Anticipate succession planning needs,
- Extend relationships with former employees,
- Redesign and restructure jobs,
- Enhance wellness/ergonomic fit, and
- Offer age-sensitive benefits.

With the promising practices featured in this report, the employers have realized the above outcomes that benefit business and address the needs of employees throughout their career and into retirement.

Although age diversity practices are often developed to meet the needs of older workers, organizations are beginning to recognize that an integrated age management approach with a life course perspective can have the greatest positive impact on business. *A Guide to Good Practice in Age Management* outlines essential ingredients of successful integrated age management strategies.[7] This report's recommendations include these ingredients and more:

1. Proactively preventing age-related workplace issues as opposed to engaging in reactive problem solving.

2. Focusing on the entire employment lifespan of employees, not just older workers.

3. Considering all dimensions in the Prism of Age as issues and bringing together all stakeholders to contribute.

4. Educating employers about the Prism of Age dimensions.

5. Ensuring that "catch up" projects are launched to address older worker issues of skills training or health and wellness/productivity/effectiveness.

6. Conducting regular strategic evaluations of age management policies and initiatives to assess their effectiveness.

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ABOUT THE SLOAN CENTER ON AGING & WORK

Established in 2005, the Sloan Center on Aging & Work at Boston College promotes quality of employment as an imperative for the 21st century multi-generational workforce. We integrate evidence from research with insights from workplace experiences to inform innovative organizational decision-making. Collaborating with business leaders and scholars in a multi-disciplinary dialogue, the center develops the next generation of knowledge and talent management.

Since our founding, we have conducted more than 20 studies in collaboration with employers: for example, studies on "Age & Generations," "Talent Management," and "Generations of Talent." Studies under way are "Assessing the Impact of Time and Place Management" and "Engaged as We Age." The Sloan Center on Aging & Work is grateful for the continued support of the Alfred P. Sloan Foundation.

For more information about the Sloan Center on Aging & Work at Boston College, please visit: http://agingandwork.bc.edu.

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