Read This First!
Thank you for using the SHRM Foundation DVD, “Investing in Older Workers: The National Institutes of Health.” This document outlines the suggested use and explanation of the supplemental materials created for use with the video. Please read it carefully before proceeding.

Our goal is to provide you, the facilitator, with materials that will allow you to create a customized presentation and discussion. For this reason, we have included this Discussion Guide document. In addition, discussion question slides from the PowerPoint can be deleted to customize your presentation and discussion.

Suggested Program Agenda
1. Distribute the Discussion Questions to participants, and suggest that they watch the DVD with questions in mind.
2. Play the DVD.
3. Use the PowerPoint introductory slides (Slides 2 through 5) to discuss the DVD, the history of the NIH and the five important lessons presented at the end of the DVD (Slides 25 through 30).
4. Distribute the Participant Worksheets to generate individual thought and discussion. (Alternatively, these worksheets can also be used to assign group activities and continue with Step 5 after the activity, or they can be used after Step 5 to assess participant understanding. Please see the Participant Worksheet section below for more information.)
5. Use the PowerPoint question slides (Slides 6 through 24) to discuss each individual primary discussion question. (The Question Guide provides the facilitator with all the necessary information and answers to lead a comprehensive discussion.)
6. Distribute the Participant Worksheet Answer Keys to participants.

Supplemental Materials Descriptions
National Institutes of Health Overview
The National Institutes of Health Overview can be used either as a facilitator discussion guide or as a participant handout. It includes a general outline of important facts about the organization, as well as a comprehensive overview of how National Institutes of Health recruits and retains workers over the age of 50.

20-Minute Video Synopsis
The Video Synopsis can be used either as a facilitator discussion guide or as a participant handout. It presents a chronological summary of the important segments of the video, highlighting the speakers and critical points in each section.

SHRM Overview
Founded in 1948, the Society for Human Resource Management (SHRM) is the world’s largest HR membership organization devoted to human resource management. Representing more than 275,000 members in over 160 countries, the Society is the leading provider of resources to serve the needs of HR professionals and advance the professional practice of human resource management. SHRM has more than 575 affiliated chapters within the United States and subsidiary offices in China, India and United Arab Emirates. Twitter: @SHRM. Online at shrm.org.
Please consider the following questions as you watch the SHRM Foundation DVD, “Investing in Older Workers: The National Institutes of Health.” Your facilitator may ask you to answer these questions in discussion or activity format at the completion of the DVD.

**What types of jobs might be best suited for workers over the age of 50?**

**How can an organization specifically attract workers interested in a second career?**

**What are typical myths about workers over 50?**

**How can an organization help resolve generational conflicts?**

**What types of programs and benefits might be of interest to workers over 50?**

**What benefits might older workers bring to an organization?**

**What personality traits do workers over the age of 50 share?**

**How can HR help retain older workers?**

**How can hiring older workers reduce labor costs?**

**How can mentorship programs keep employees of all ages engaged?**
OPERATING INFORMATION
• Headquartered in Bethesda, Maryland
• $30.9 Billion annual budget (USD).
• Founded in 1887
• Made up of 27 separate institutes and centers
• 1,200 principal investigators and 4,000+ postdoctoral fellows.
• 80% of all funding is paid out to extramural research institutions (universities, hospitals, and other clinical research facilities)

THE RESEARCH MODEL
• 27 separate institutes research advancements in health-related issues from aging to drug abuse to communicable diseases.
• Devote 10% of funding to intramural (internal) research.
• Grant 80% of funding to extramural (external) research.
• Administer and manage internal and external research to address the world’s most vital health concerns.

NATIONAL INSTITUTES OF HEALTH
• National Cancer Institute
• National Institute of Allergy and Infectious Diseases
• National Institute of Dental and Craniofacial Research
• National Institute of Diabetes and Digestive and Kidney Diseases
• National Heart, Lung, and Blood Institute
• National Institute of Mental Health
• National Institute of Neurological Disorders and Stroke
• National Library of Medicine
• National Institute of Child Health and Human Development
• National Institute of General Medical Sciences
• National Eye Institute
• National Institute of Environmental Health Sciences
• National Institute on Alcohol Abuse and Alcoholism
• National Institute on Drug Abuse
• National Institute on Aging
• National Institute of Arthritis and Musculoskeletal and Skin Diseases
• National Institute of Nursing Research
• National Institute on Deafness and Other Communication Disorders
• National Human Genome Research Institute
• National Institute of Biomedical Imaging and Bioengineering
• National Institute on Minority Health and Health Disparities
• Center for Scientific Review
• Clinical Center
• National Center for Advancing Translational Sciences
• Center for Information Technology
• John E. Fogarty International Center
• National Center for Complementary and Alternative Medicine
Narrated and presented by Wayne F. Cascio, Ph.D., SHRM Foundation’s thirteenth video examines how National Institutes of Health recruits and retains older workers. Filmed on location at National Institutes of Health’s offices in Bethesda, Maryland, USA, and featuring interviews with National Institutes of Health’s executives, managers and employees, this film presents several strategies for hiring and retaining older workers.

VIDEO INTRODUCTION
Wayne Cascio, Professor, University of Colorado Denver
Cascio describes how the global population is aging and how it affects business. He explains a brief history of National Institutes of Health.

THE MISSION OF THE NATIONAL INSTITUTES OF HEALTH
Sally J. Rockey, Ph.D. – Deputy Director for Extramural Research,
Alfred Johnson, Ph. D. – Director, Office of Research Services,
Phil Lenowitz, Deputy Director, Office of Human Resources,
Lawrence A. Tabak, D.D.S., Ph.D. – Principal Deputy Director
1:10 - The NIH Mission
2:30 - Advancements in life spans, longer careers

Dr. Rockey explains the mission of the NIH. Dr. Johnson describes the mission as “trying to improve the health of the nation.” Dr. Tabak explains that the NIH seeks talent of all ages at all levels of the organization. Dr. Cascio explains why careers are longer now than in the past.

THE BUSINESS CASE FOR RECRUITING OLDER WORKERS
Lawrence A. Tabak, D.D.S., Ph.D. – Principal Deputy Director,
Valerie Gill – Director, Client Services Division,
Sally J. Rockey, Ph.D. – Deputy Director for Extramural Research,
Alfred Johnson, Ph. D. – Director, Office of Research Services,
Colleen Barros, M.A. – Deputy Director for Management,
Sally Lee – Executive Officer, National Institute of General Medical Sciences
2:50 - Building on prior work
4:20 - Qualities of older workers
5:15 - The charter of the NIH

Dr. Tabak explains that science is built upon prior work through many mechanisms including mentorships. Ms. Gill explains the value of intellectual capital. Ms. Barros explains that human talent and diversity is the key to successful progress at NIH. Dr. Cascio explains the purpose and types of work that are conducted at the National Institutes of Health and how the funds are allocated between internal and external researchers. Ms. Lee explains that value of institutional knowledge.
STRATEGIES FOR RECRUITING OLDER WORKERS
Valerie Gill – Director, Client Services Division,
Colleen Barros, M.A. – Deputy Director for Management,
Alfred Johnson, Ph. D. – Director, Office of Research Services,
Phil Lenowitz, Deputy Director, Office of Human Resources,
Julie Berko – Director, Workforce Relations Division

6:15 - Military transition assistance centers
7:30 - Reemploy annuitants and retirees
7:53 - Finding challenges for workers over 50
8:00 - Flexible workplace
8:25 - Health and wellness benefits
8:50 - Myths about older workers

Mr. Gill explains recruiting techniques used by the NIH including military transition assistance, passive online recruiting through LinkedIn, and workplace flexibility. Ms. Barros explains the purpose of rehiring annuitants and retirees. Dr. Johnson explains the important of keeping people over 50 engaged in their work. Mr. Lenowitz talks about the forms of workplace flexibility. Ms. Berko describes benefits like health and wellness programs. Dr. Cascio explains the myths of older workers.

WHY OLDER WORKERS STAY
Sally J. Rockey, Ph.D. – Deputy Director for Extramural Research,
Colleen Barros, M.A. – Deputy Director for Management,
Phil Lenowitz, Deputy Director, Office of Human Resources

9:10 - Emertis and balanced-life programs
9:40 - Programs for all generations
10:47 - In-house research

Dr. Rockey explains the need for “graceful exit” programs and the efforts NIH makes to ensure people have a balanced work and personal life. Ms. Barros explains how NIH puts together programs to meet the needs of a diverse workforce. Mr. Lenowitz explains the backup dependent care program. Dr. Cascio explains the in-house research work at NIH.

ATTRACTING AND RETAINING YOUNGER PEOPLE
Sally J. Rockey, Ph.D. – Deputy Director for Extramural Research,
Colleen Barros, M.A. – Deputy Director for Management,
Julie Berko – Director, Workforce Relations Division,
Sally Lee – Executive Officer, National Institute of General Medical Sciences,
Phil Lenowitz, Deputy Director, Office of Human Resources

11:20 - Younger and older people working together
11:55 - Benefits for younger workers
12:10 - Avoid stereotypes
12:30 - Inter-generational advisors and mentorship programs
Dr. Rockey and Ms. Barros explain the efforts NIH makes to have younger employees work with older employees. Ms. Berko explains how health and wellness programs attract younger workers. Ms. Lee explains the needs to not stereotype a generation and Mr. Lenowitz explains the concept of an inter-generational advisor and mentorship programs.

**ADDRESSING INTER-GENERATIONAL CONFLICT**

*Julie Berko – Director, Workforce Relations Division,*  
*Alfred Johnson, Ph. D. – Director, Office of Research Services,*  
*Phil Lenowitz, Deputy Director, Office of Human Resources*

13:05 - Programs that build on the past  
13:45 - Conflict resolution  
14:10 - Talent management

Ms. Berko explains the importance of putting together programs that encourage new employees to build on the experiences of the older workers. Dr. Johnson explains the excitement of workers of all ages. Mr. Lenowitz explains how NIH addresses conflict resolution. Dr. Cascio explains how NIH handles talent management.

**MYTHS ABOUT OLDER WORKERS**

*Julie Berko – Director, Workforce Relations Division,*  
*Alfred Johnson, Ph. D. – Director, Office of Research Services,*  
*Sally Lee – Executive Officer, National Institute of General Medical Sciences,*  
*Lawrence A. Tabak, D.D.S., Ph.D. – Principal Deputy Director*

15:05 - Common myths of older workers

Ms. Berko explains the myth of technophobia of older workers. Mr. Johnson dispels the myth of older workers being stuck in their ways. Ms. Lee and Dr. Tabak discuss the creativity of older workers. Dr. Cascio explains specific programs at NIH that are targeted at older workers.

**ROLE OF HUMAN RESOURCES**

*Lawrence A. Tabak, D.D.S., Ph.D. – Principal Deputy Director,*  
*Phil Lenowitz, Deputy Director, Office of Human Resources*

17:30 - HR programs for older workers

Dr. Tabak explains how the human resources department has helped develop many programs to keep older workers engaged and working at NIH. Mr. Lenowitz discusses the benefits of teleworking.

**FIVE LESSONS**

*Wayne Cascio, Professor, University of Colorado Denver*

18:45 - The five lessons

Professor Cascio explains the five key lessons covered in this case study.
About the Society for Human Resource Management

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Online at shrm.org.

About the SHRM Foundation

As a 501(c)(3) nonprofit affiliate of the Society for Human Resource Management (SHRM), the SHRM Foundation is a catalyst for thought leadership. We help predict where the workforce is headed because we’ve been studying its evolution for over 40 years. The SHRM Foundation advances global human capital knowledge and practice by providing thought leadership and educational support, and sponsoring, funding and driving the adoption of cutting-edge, actionable, evidence-based research. The Foundation is governed by a volunteer board of directors, comprising distinguished HR academic and practice leaders. Contributions to the SHRM Foundation are tax-deductible. Follow us on Twitter: @shrmfoundation. Online at shrmfoundation.org.
People over the age of 50 are strong candidates for jobs at any level of an organization. Whether experience, security, flexibility, and seasonality are needed, there are likely many baby-boomers who fit the needs of an organization.

**Highly skilled jobs**
In the ever-growing knowledge economy, many occupations require advanced, specialized training and significant levels of practical experience. These jobs, which are suitable for employees of any age, are of particular interest and potentially better suited for people who have worked in the field for several years. Often the most qualified workers are over the age of 50 and might have already completed their first career. Jobs in science, academia, engineering, aviation, customer-relationship management, and employee management often require these types of highly skilled employees.

**Hard-to-retain, entry-level jobs**
There is an ever-growing number of people that have retired from a first career, but are not quite interested in exiting the work force. Many of these people indicate that they are not interested in starting another career, but rather are looking for entry-level employment to earn extra spending money and to eliminate boredom. These people are often highly motivated, loyal employees who are more interested in staying in low-level positions than their younger colleagues who are seeking advancement within the organization.

**Managerial positions**
Experience is one of the most important qualities of an effective manager. People over 50 often have a significant amount of experience in a particular occupation and make excellent managers and mentors. In many cultures, seniors are given implicit respect that transcends from the social to the professional, giving these people certain credibility with those whom they manage.

**Strategic/visionary jobs**
History repeats itself and the best way to see into the future is often by reflecting on the past. People over 50 have a distinct advantage over younger employees in that they have a history of successes and failures that helped them develop a clarified vision of the future. Corporate strategy is often a matter of choosing what paths to take to lead to prosperity.

People with previous careers or an extensive history in a particular field can help organizations avoid previously identified pitfalls and provide guidance based on their institutional and historical knowledge.

What types of jobs might be best suited for workers over the age of 50?

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Name some highly skilled jobs that might be great for older workers

As we progress further into the information age, highly skilled jobs are becoming more plentiful and predominate. Some of these jobs include: corporate training, human resources management, academic research and educators, scientists, medical professionals, engineers, computer and telecommunication professionals, airline pilots, and many others.

What qualities might older workers possess that make them good managers?

Managers over the age of 50 are often more confident, mature, patient, and emotionally stable than managers who are early in their careers. They gained these qualities through years of events, experiences, and perspectives. Managers over 50 are often more likely to stay with a company than their younger counterparts. Further, people over 50 are less likely to have pressing external factors, such as dependent children and personal financial concerns, which allows them to focus on their jobs more deeply.

How can an historical perspective shape the vision of the future?

Knowing what not to do is as important as knowing what to do. Lessons learned from the past can help an organization develop a focused strategy for future development. Employees over 50 have a professional and personal history that can guide an organization down a path of prosperity, while avoiding pitfalls that they have already discovered through previous experience.

**ADDITIONAL RESOURCES**

The Best Employers And Jobs For Workers Over 50

Invest in Older Workers
As life expectancy increases and American middle-class wages stagnate, the majority of middle-aged workers in the United States are often unprepared to fully retire until later in life. Many government and safety-regulated employees have fixed end-of-employment deadlines (e.g. airline pilots are required to retire at age 65, and some government employees must retire after a certain number of years on the job), which makes them prime candidates for second careers.

Work with the military
The United States military has several programs designed to help place retiring veterans in suitable second careers. Many branches have specific transition-assistance centers that work with businesses and organizations to identify qualified candidates for available positions. There are also several non-profit organizations that work with veterans to help place them in second careers.

Retire rehire
During an employee’s exit interview, ask if the retiring employee is interested in continuing to work with the organization. Look for types of work that he or she might be interested in and give the person an opportunity to come back when he or she is ready to return to work. Some experts suggest offering retirees a consultancy position to allow for knowledge transfer to replacement employees.

Provide appropriate opportunities
Create opportunities and positions that are attractive to older, more experienced workers. Consider creating part- or flexible work-schedule positions that allow older workers to contribute to the organization while enjoying the freedom of partial retirement. For people interested in a full second-career, consider adding benefits specifically tailored to their needs, such as adult dependent care and low-cost health insurance.

Think outside the network
It is important to recruit older workers through a multitude of channels. Online services like monster.com and other internet-based résumé systems might not adequately identify the “soft skills” that are often a key reasons to hire older workers. It can be quite difficult to quantify the value of one’s experience in a résumé, and even harder for a computer system to parse and match those people with an organization’s needs. An organization should consider interpersonal networking events, recommendations of current employees, and advertising in media that are used by people over 50 (e.g. newspapers, magazines, radio).

How can a recruiter match available positions with roles in the military?
The government provides a list of military roles and their accompanying responsibilities. This list provides a window into a soldier’s experience and can help human resource recruiters identify suitable candidates for positions in their organizations. There are also many online resources that provide a crosswalk between civilian job classes and military career tracks.

What are some limitations associated with re-hiring retirees?
Some candidates might not be eligible to work until a waiting period has elapsed since their previous career. This is particularly common with government-pension retirees. Also, those people who draw social security retirement benefits are limited to a certain amount of money they can earn each year before they are no longer eligible to receive social security benefits.

List a few ways to recruit employees over the age of 50
There are several businesses that specialize in jobs for older workers – retirementjobs.com, retireecareers.com, and seniors4hire.org, just to name a few. Many agencies have partnered with AARP to connect older job seekers with organizations. Other options include networking through local churches, schools, military bases, and social organizations like the Rotary Club or other affinity groups.

According to the Experts...

“One avenue that we use is that we have a relationship with the various military installations, specifically with the transition assistance centers. We want to make sure we are in the forefront of individual’s [minds] who are beginning to think of their next career.”

Valerie Gill
Director, Client Services Division
What are typical myths about workers over 50?

Statistics show that the number of unemployed and underemployed people over the age of 50 is significantly higher than younger workers. The evidence shows that most small businesses operate with a set of biases toward older workers that are based on inaccurate and patently false assumptions.

**Cost of healthcare**

Many organizations have traditionally shied away from hiring older people for the fear of increases in healthcare costs. These assumptions are false. In fact, older workers typically use less health insurance than younger workers who are having families and taking care of children. Moreover, many of the increases in insurance premiums due to the age of employees can be offset through a series of proactive measures to help curb healthcare spending. Some of those programs include health and wellness programs, company-provided athletic facilities, and other loss-prevention strategies. In New York, and many other states, legislatures have prohibited insurers from considering employees’ ages when selling group policies. As of 2014 under the affordable healthcare act, insurers that base their rates on age are limited to a 3-to-1 ratio between the premium of the oldest and youngest employees.

**Not interested in learning**

It’s never wise to assume that an old dog can’t learn new tricks. At the National Institutes of Health it was found that older workers desire challenges and changes to keep them fresh and motivated even more so than their younger counterparts.

**Technophobic**

People over that age of 50 are often assumed to have a phobia about technology. In reality, people over the age of 50 look at technology as a tool or a way to complete a job. They are not typically interested in using technology for social purposes, which is actually beneficial to an organization that might struggle with the distractions caused by technology for younger employees.

**Increased labor costs**

It is true that people with experience might demand a higher pay rate. This increase in hourly pay can be offset by a decrease in the number of hours worked. Many people over the age of 50 are interested in flexible and part-time work arrangements, and that translates to budgetary savings. Also, some assume that older people work at a slower pace and are often less productive than their younger counterparts; however, evidence suggests that this is not true and that with proper training older workers operate more efficiently than those with less experience.

What are some ways to help older workers become engaged with technology?

People who entered the work force prior to the dawn of modern technology have a different relationship with computers and software than their younger counterparts do. In some ways, this difference is a significant advantage for older workers, in that they can be trained to use a system or software package exactly as it is intended to operate without any preconceived expectations. Providing adequate and comprehensive training to these workers can make them highly productive with the same levels of efficiency as younger workers.

According to the Experts...

“A common myth is that you can’t teach [older workers] anything new or that they are stuck in their ways. It has been the total opposite in my experience. They are totally eager to learn.”

Alfred Johnson, Ph. D.
Director, Office of Research Services
Conflicts between generations happen in every aspect of life. At the workplace, conflicts surface as result of differences in work ethics, expectations of teamwork, and generalized worldviews. Resolving these issues requires an attempt to seek understanding and find common ground. Organizations must help all parties to a conflict to look at how their behavior affects the big picture, and come up with a plan to address the conflict such that each side feels understood.

**Mentorships to the rescue**

Mentorships are one of the most effective, proactive measures an organization can implement to prevent conflicts between generations. Creating interpersonal relationships between colleagues of different generations can help avoid misunderstanding and prevent under-communicated expectations. Two-way mentorships are particularly effective in that an organization highlights that each person has value in the relationship and that each side should attempt to learn as much as it can from the other.

**Ombudspersons**

The role of the ombudsperson is to be the professional mediator when conflicting persons cannot resolve issues themselves. The ombudsperson can act as a liaison between the employees and the organization as well as between two conflicting employees. The ombudsperson should have a deep understanding of the fundamentals of conflict resolution, namely uncovering assumptions, focusing feedback on specific behaviors and their impacts, identifying the underlying interests behind the conflict, and creating open channels for dialogue and communication.

**Offer benefits that benefit everyone**

It is important for organizations to treat every employee equally and to provide benefits that are desired by all employees. Further, just because an employee deems a benefit important, the employee might not use that benefit. This gap between value and utilization provides an opportunity for an organization to offer benefits for employees that appeal to different generations without significantly increasing cost and without creating an unintentional bias toward one generation over another. A great example of a benefit that is valued by all but not used by everyone is an all-age dependent-care benefit. By providing care for dependent children as well as dependent adults, employees of all generations value the benefit even though not everyone will have an opportunity to utilize the service.

**Additional Resources**

Generation Gap Causes Conflict in Some Workplaces, SHRM Poll Shows
http://www.shrm.org/about/pressroom/pressreleases/pages/generationalconflict.aspx
There are many programs and benefits that an organization can setup to attract and retain workers over 50. These benefits will likely be of value to all employees, but might have particular value for people over 50.

**Health and wellness programs**

Many people over the age of 50 have a heightened interest in their physical health; with age comes the need to take better care of one’s body. Common ailments associated with age, including arthritis, heart disease, diabetes, and others, can be avoided or slowed by a routine of adequate exercise and attention to one’s nutrition levels. Employees, particularly those over 50, are attracted to organizations that provide and encourage the use of exercise facilities and wellness programs for their programs.

**Eldercare and backup dependent care**

One of the side effects of the global increase in life spans is that people nearing the end of their professional careers are finding that they need to take care of their aging parents. In America, nearly 40% of all workers are tasked with elder-care responsibilities. An organization can provide a form of insurance called “eldercare” that works similarly to dependent-child insurance. Many insurance companies have started to allow workers to enroll their parents as dependents on healthcare plans. Many home healthcare and visiting nurse organizations have started to partner with companies and organizations to offer backup dependent care for employees who cannot take care of their elderly dependents due to career-related responsibilities. These programs allow an organization to retain workers longer and help keep workers focused on their jobs.

**Emiritus programs**

Many organizations have implemented emiritus programs. These programs allow retirees to come back to work on a part-time (or as-needed) basis. Retirees can serve as consultants, mentors, or even front-line workers, depending on their interest and availability. These programs provide access to institutional knowledge that walks out the door when an employee retires.

**Phased-retirement program**

Phased-retirement programs work in several ways; however the most common method is to take a job, split it in half, and hire a new employee to do half the work that the retiree is forgoing. There are many benefits to this type of arrangement. For the organization, these programs help transfer knowledge from the outgoing retiree to his or her replacement. For the retiree, it gives him or her a chance to keep active with the company but also enjoy increased amount of time off work. New employees also benefit from these programs by having a solid window of time to learn a job from the people who know it best.

**Flexible work arrangements**

People over 50 often have many personal responsibilities outside of work. Children, grandchildren and dependent parents can require their attention. When possible organizations should offer flexible work arrangements – teleworking, flexible scheduling, part-time work – to accommodate these employees’ needs. These work arrangements allow older workers to remain active employees with an organization while taking care of the personal matters that often cause people to exit the workforce prematurely.

**According to the Experts…**

“Offer support programs like health and exercise programs. Potential employees really get excited about these programs whether they would use them or not.”

Julie Berko
Director, Workforce Relations Division

How can a small organization provide health and wellness benefits?

Small organizations can partner with local gyms and wellness clinics to provide group discounts for employees who use the facilities. They can also get involved in multi-employer group packages similar to the way health insurance plans are provided for small businesses, so their employees have access to wellness programs (nutrition, counseling, yoga, physical therapy, and others).

What are some key elements of eldercare services?

Eldercare is a generalized term for those things that enable employees to care for their aging parents. Most often eldercare is simply adding a parent as a dependent on an employee’s health insurance benefits. Other services include backup dependent care, which provides on-site services for elderly relatives while a person is occupied by work obligations, and prescription-drug benefits.

How can phased-retirement programs help slow the loss of institutional knowledge as Baby Boomers enter retirement?

Phased-retirement programs help keep retiring employees in the workforce longer. Some programs offer to split a full-time job into two part-time jobs, while other programs offer employees an opportunity to defer retirement while drawing from pensions and putting those funds into a private IRA. The idea is to keep people in the workforce longer, so that knowledge transfer can happen in an affordable, reliable way.
There is a high cost to employee turnover. The cost of replacing employees can be overwhelming for an organization. Hiring people over the age of 50 can help an organization build and maintain a dedicated and reliable workforce that in turn provides significant long- and short-term savings. Some of these savings can be used to train older employees on technological tasks that are not second nature for them, like they are for younger employees. Older-generation workers have unique values and skills that translate into time and money savings for an organization. An organization should consider the costs associated with high turnover within a more youthful workforce, versus the experience and maturity found in older workers.

**Punctuality**
Most older workers enjoy going to work each day, which makes them more likely to arrive on time and ready to work. Morale within an organization is often influenced by attendance and can have a profound effect on a team’s ability to function efficiently. Older workers take punctuality seriously and understand that it sets the tone for an effective work environment.

**Setting an example**
Older workers generally strive to live up to any outlined expectations, providing an intangible value to an organization. This behavior makes them role models and mentors to their coworkers, which helps simplify the training of others.

**Efficiency and confidence**
Older workers have the experience-backed confidence to provide recommendations and share ideas, making them ideal employees. They save organizations time and money through a greater understanding of how their jobs can be completed more efficiently. Experience also contributes to confidence, which helps workers make informed, independent, intelligent decisions on behalf of the organization.

**Experience and leadership**
Research demonstrates that the number-one method to broaden and deepen leadership capabilities is through experience. Older workers have years of on-the-job experiences that provide frameworks for thinking and talent development.

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According to the Experts...

“**There is a lot of value to having older workers who have a lot of institutional knowledge, experience and qualifications.**”

Sally Lee
Executive Officer, National Institute of General Medical Sciences
QUESTION GUIDE

There are competencies and personality traits that older workers share. Older workers bring unique skills and values to an organization that are hard to quantify in a résumé and can easily be overlooked. Some characteristics that many older workers possess can directly contribute to, and positively impact, an organization’s bottom line.

**Dedication**
Dedicated workers produce higher-quality work. Workers over the age of 50 tend to be highly dedicated to the job – either from the fear of not being able to find replacement work or as a carry-over of the personal work ethic often found in the baby-boomer generation. This dedication results in an attention to detail that can help identify potentially costly mistakes.

**Detail-oriented, focused, and attentive**
This skill is something that is developed and ingrained in a worker through past lessons and experiences. These lessons have taught them to use a focused and concise effort to complete the task at hand. Workers over the age of 50 tend to have the patience and determination to explore the intricacies of a problem until a suitable solution has been discovered.

**Good listeners**
Older employees have a well-developed sense of learning and information retention. Often workers over 50 know what is required (i.e. taking notes and reviewing advice) to retain what they are being told. They are also frequently good people to use as a sounding board for ideas and concerns since they have likely experienced similar situations in their work histories.

**Pride in a job well done**
Older-generation employees feel a sense of ownership in their work and take pride in the final product. Older employees are also willing to stay later and put in the extra effort when necessary to ensure the final outcome is refined and presentable. People entering a second career often desire a sense of pride in their work and look for meaning and value in their accomplishments.

**Communication skills**
Communication skills can be learned early in a career, but are honed through many years of experience. There are times when situations involve more than just facts and require a level of judgment when communicating about them. These situations often require employees to speak with poise and diplomacy and know what to say and how to say it so that the situation is defused.

*Why do older workers tend to be more dedicated to a job?*
Many employers find that young employees have a higher turnover rate than people over 50. Often, the hiring process is unable to sort out which employees will stay with a company for an extended period of time versus those who will work a few months and decide to move on. People over 50 tend to be less mobile in their careers, and they appreciate their jobs more than employees who can often find new work with little effort.

*How does pride in one’s work translate to a job well done?*
Pride in one’s work tells a lot about a person’s character. Having completed something to the best of one’s ability not only shows dedication, but respect for oneself, one’s co-workers, and one’s organization. Those employees who have pride in their work tend to put in the effort to see a project through to its completion, and to fulfill their role requirements to the fullest.

*Discuss the differences between Generation-X and the Baby Boomers and how those differences can impact an organization.*
Discuss in your study group the differences between the two generations. Consider professional and personal characteristics and how the traits of each generation can complement each other’s strengths and weaknesses.

**ADDITIONAL RESOURCES**

- Workforce Planning: Aging and Employment (Powerpoint)
  http://www.shrm.org/education/hreducation/documents/mcintosh_aging%20module%206_updated_final.ppt

- Generational Differences (PDF)

- Benefits Of Hiring Older Workers
The Human Resource department in an organization can help retain older workers by identifying the needs of individual workers and putting together workable solutions that keep people interested in staying with the company in some capacity beyond their planned date of retirement. Making special considerations for the needs of these workers will likely benefit the entire body of employees.

**Advocating for programs**
There are many retirement-deferment plans implemented in today’s workforce. HR should work with upper management to put together a few deferment packages that address the needs of the company while respecting the desires of the employees. A phased-retirement plan, which addresses the loss of institutional knowledge by splitting a job into segments and allowing the retiree to work part-time, is a cost-effective way to protect the organization from knowledge loss associated with turnover. A traditional deferred-retirement plan allows people to begin drawing from a pension fund prior to retiring fully. These programs help keep people working longer, which can be beneficial for knowledge transfer and business continuity.

**Identify incentives that work**
Begin by surveying aging employees to find out what incentives would keep them employed longer. Many organizations have found that offering extended contributions to retirement-saving plans, additional sick-leave hours, and contributions toward short- and long-term disability insurance has worked to help draw employees into deferred retirement plans. Also, employers have found that creating meaningful work for older workers helps to retain them longer.

**Tailor roles specifically for older workers**
Retaining older workers might be as simple as reclassifying their roles in the organization. Look at the productivity demands of the organization and design streamlined roles that allow older workers to stay with the company on a part-time, or as-needed, basis while giving them flexibility to enjoy their later years. The streamlined roles should seek to eliminate sub-peak performance times, thereby maximizing the efficiency of the organization.

**Keep older workers learning**
The best way to keep a worker with the organization is to keep him or her from feeling stagnant. Never stop investing in the training and education of workers, particularly among workers over 50. Often older workers see their employment as an outlet for their creativity and mental activity. By keeping these people learning, they are less likely to become bored with their positions and more likely to keep working for their organizations.

**What is a “DROP” plan?**
A DROP (Deferred Retirement Option Plan) is a program under which an employee who is eligible to retire and receive benefits under a defined-benefit retirement plan chooses to continue to work. Instead of having the additional years of service taken into account for the defined-benefit plan, the employee has a lump-sum of money put into a separate interest-bearing retirement account. The balance of the account is paid to the employee when he or she retires. Often these programs add as many as five years of work to a person’s career.

**Name some incentives that can keep employees working longer.**
There are many opportunities for an employer to keep employees working longer. Flexible work schedules, flexible work hours, flexible work locations, telecommuting, deferred retirement programs, redefined roles and career flexibility, advanced and technical training, disability management, and simple things like ergonomic considerations and workplace comfort all contribute to a person’s decision to keep working into the traditional retirement years.

**What are some ways to keep older workers learning?**
Older workers respond well to feeling valuable. Organizations can instill confidence in their older workers by continuing to invest in their education and professional development. Encouraging older workers to attend industry and trade workshops and events helps assure an older worker of his or her value to the company.

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According to the Experts...

“[We are] putting together programs to meet the needs of our diverse workforce. A lot of workers are part of the sandwich generation – so elder care is a part of their world. You build you program around retention of the people in your workforce.”

Colleen Barros, M.A.
Deputy Director for Management

**ADDITIONAL RESOURCES**

Providing Flex Options to Older Workers Yields Strategic Benefits
It is quite common for older workers who are entering their second careers to have health insurance plans from previous employers. Often they may have an additional source of income and be willing to take a smaller wage to obtain a position they want. Workers over 50 understand that working for a company is much more than just collecting a paycheck. The key to hiring and retaining these workers is to provide meaningful work that gives their efforts a sense of purpose. Workers in their second career who feel valued by their employers are far more likely to stay with a job, resulting in a significant reduction in the cost of employee turnover.

**Part-time employment**
There are many older workers who are interested in working part-time for the purpose of supplemental income and staying active. They often have healthcare benefits from their first career and wish to work for a company they admire for a fair, if not modest, rate of pay. Hiring older workers to cover part-time positions is a great way to attract dedicated and loyal employees without the risk of high turnover and the eventual desire for a promotion. In some organizations a differentiation between part-time and full-time employment is eligibility for benefits, such as paid vacation days, sick leave, 401k matching and health insurance.

**Fewer unexpected absences**
Several studies of older workers have revealed that one of the leading benefits of hiring them is that they are more typically punctual and have a significantly lower rate of unexpected absences. These qualities reduce labor costs by allowing an organization to hire fewer, more reliable workers. Unexpected absences can reduce an organization’s morale, productivity, and profitability.

**Lower turnover ratio**
The market for workers over the age of 50 is still very limited. Once an older worker has a job, he or she tends to value it more than his or her more mobile, younger colleagues, and is, therefore, less likely to leave. The cost of turnover can be crippling for an organization. Hiring workers who are interested in staying is a wise financial decision.

**Efficiency is key**
The myth that older workers operate more slowly than younger counterparts is categorically false. Evidence suggests that properly trained older employees are as productive as younger employees. The key is to utilize the most advanced methods, processes and technologies to accomplish work.

**How can hiring older workers reduce labor costs?**

In what ways does part-time labor reduce expenses?
Part-time labor offers many cost-saving advantages for organizations. When employees desire part-time work, it can be a great tool to get work done without the added expenses of full-time employment requirements. Typically, most part-time workers do not receive health insurance, paid time-off, and retirement benefits, thereby saving the organization expenses related to granting these benefits. Part-time work is often on an as-needed basis, meaning when demand is high employees might be able to work more hours than when demand is low.

What are some costs associated with increased levels of employee turnover?
The costs of employee replacement – recruiting, interviewing, hiring, and training – are some of the largest expenses related to employee turnover. Beyond simply replacing workers, turnover creates deficits in production and efficiency. These deficits can result in real costs for the organization when its gross product is less than expected. High turnover rates can negatively impact employee morale, which can lead to a less efficient workforce.

How can workers over 50 increase the efficiency of a workforce?
Workers over 50 often have deep levels of experience and a commitment to doing things right. The more experienced a worker is, the less likely he or she is to make costly and time-consuming mistakes. Experience implies a level of knowledge that is gained by both successes and failures, and those lessons serve to make people more efficient workers. Beyond life experience, with age comes the desire to do things correctly the first time. Many people over 50 are not interested in wasting time with a trial-by-error philosophy, but rather are interested in researching and following well-documented best practices.

**ADDITIONAL RESOURCES**

12 Benefits of Hiring Older Workers
http://www.entrepreneur.com/article/167500
QUESTION GUIDE

Mentorship programs keep learning alive in an organization. By encouraging a learning culture through mentoring, leaders ensure that employees take an active role in spreading best practices throughout an organization. This collaboration develops individuals professionally and interpersonally, thereby increasing employee engagement. Mentoring enables both career and leadership development to help employees sharpen skills and become more valuable to their organizations.

Teach an old dog new tricks
Reverse mentoring is essentially a two-way channel for collaboration between younger employees and older employees. Such a partnership provides younger employees a chance to see the larger picture, while giving older workers insight into the perspective of the younger workers. Often younger workers communicate the latest trends in technology, management styles, and modern means of interpersonal communication. When implemented properly, reverse mentoring can help older workers stay relevant and current with the latest advances and trends both professionally and socially.

Build on a foundation
Mentorship encourages older employees to share their career-long findings and discoveries with young employees. These foundations ensure a level of continuity from generation to generation and give older workers a sense of value for their accomplishments. Beyond simply teaching younger employees how things have been in the past, mentorships offer older employees a second perspective that might help them overcome any obstacles or ongoing issues.

Jumpstart ideas
Collaborative work between young and older workers can lead to some breakthrough advances in products and services. Organizations that bring together two generations of workers to work on a project will find that ideas percolate faster, obstacles are overcome more easily, and outcomes are achieved in a more expeditious and complete manner. This collaboration can extend beyond a single mentor/mentee relationship to involve several employees throughout an organization.

The things not documented
Mentorships are a way of passing information from older workers to younger workers about things that are not easily documented. Institutional knowledge, corporate culture, experiential insight, and other intangible lessons are nearly impossible to quantify into an employee manual and are best passed on by word of mouth and the actions of employees.

How does reverse mentoring help workers over 50 stay interested in working for an organization?
Reverse mentoring gives older workers an opportunity to feel relevant to younger workers, while at the same time learning new and exciting technologies, methodologies, and best practices from their younger counterparts. Reverse mentoring creates an important interpersonal relationship between workers of different generations that keeps older workers interested in their work and in the organization.

What types of roles in an organization are best served by mentorship programs?
Mentorship programs help advance all sorts of roles within an organization. Managerial, scientific, technical, mechanical, engineering, academic and training roles stand to benefit greatly from mentorship programs. Beyond highly technical roles, mentorship helps guarantee continuity and stability in clerical, factory-worker, customer relationship, and service positions.

What types of undocumented information can a mentorship program help pass on to young employees?
Mentorship programs help transmit corporate culture, institutional knowledge, experiential insight, and customer/vendor-relationship history. Other types of undocumented information include interoffice politics, such as who to contact to really get things done and who to avoid when seeking certain types of information.

According to the Experts...

“Mentorship is built into the scientific community. It’s part of our culture. We have internship programs to introduce future workers to experienced older workers.”

Phil Lenowitz
Deputy Director, Office of Human Resources

ADDITIONAL RESOURCES
Creating A Mentor Program
What types of jobs might be best suited for workers over the age of 50?

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Name some highly skilled jobs that might be great for older workers.
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What qualities might older workers possess that make them good managers?
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How can an historical perspective shape the vision of the future?
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PARTICIPANT WORKSHEET

Participant’s Name

Follow the facilitator’s instructions to complete this worksheet. Comprehensive answers will incorporate information from the video, personal experience and classroom discussions.

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How can a recruiter match available positions with roles in the military?

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What are some limitations associated with re-hiring retirees?

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List a few ways to recruit employees over the age of 50.

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How can an organization specifically attract workers interested in a second career?
PARTICIPANT WORKSHEET

Participant’s Name

Follow the facilitator’s instructions to complete this worksheet. Comprehensive answers will incorporate information from the video, personal experience and classroom discussions.

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What are typical myths about workers over 50?

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What benefits accrue when employees over the age of 50 lack interest in social technology?
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In what ways has Obamacare (The Affordable Care Act) changed the landscape for hiring older people?
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What are some ways to help older workers become engaged with technology?
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PARTICIPANT WORKSHEET

Participant’s Name

Follow the facilitator’s instructions to complete this worksheet. Comprehensive answers will incorporate information from the video, personal experience and classroom discussions.

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How can an organization help resolve generational conflicts?

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How does an organization establish a mentorship program?

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Name some benefits that will appeal to people over 50.

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What are the risks of not valuing an organization’s legacy processes and systems?

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PARTICIPANT WORKSHEET

Participant’s Name

Follow the facilitator’s instructions to complete this worksheet. Comprehensive answers will incorporate information from the video, personal experience and classroom discussions.

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How can a small organization provide health and wellness benefits?

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What are some key elements of eldercare services?

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How can phased-retirement programs help slow the loss of institutional knowledge as Baby Boomers enter retirement?

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What types of programs and benefits might be of interest to workers over 50?

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What benefits might older workers bring to an organization?

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How does punctuality relate to efficiency?

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How does confidence save an organization time and money?

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What external factors change over time that allow older workers to be more focused?

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What personality traits do workers over the age of 50 share?

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Why do older workers tend to be more dedicated to a job?
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How does pride in one’s work translate to a job well done?
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Discuss the differences between Generation-X and the Baby Boomers and how those differences can impact an organization.
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PARTICIPANT WORKSHEET

Participant's Name

Follow the facilitator's instructions to complete this worksheet. Comprehensive answers will incorporate information from the video, personal experience and classroom discussions.

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What is a “DROP” plan?

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Name some incentives that can keep employees working longer.

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What are some ways to keep older workers learning?

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PARTICIPANT WORKSHEET

Participant’s Name

Follow the facilitator’s instructions to complete this worksheet. Comprehensive answers will incorporate information from the video, personal experience and classroom discussions.

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In what ways does part-time labor reduce expenses?

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What are some costs associated with increased levels of employee turnover?

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How can workers over 50 increase the efficiency of a workforce?

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How can hiring older workers reduce labor costs?
How can mentorship programs keep employees of all ages engaged?

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How does reverse mentoring help workers over 50 stay interested in working for an organization?
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What types of roles in an organization are best served by mentorship programs?
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What types of undocumented information can a mentorship program help pass on to young employees?
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Participant’s Name

Follow the facilitator's instructions to complete this worksheet. Comprehensive answers will incorporate information from the video, personal experience and classroom discussions.
PARTICIPANT ANSWER KEY

What types of jobs might be best suited for workers over the age of 50?

People over the age of 50 are strong candidates for jobs at any level of an organization. Whether experience, security, flexibility, and seasonality are needed, there are likely many baby-boomers who fit the needs of an organization.

**Highly skilled jobs**
In the ever-growing knowledge economy, many occupations require advanced, specialized training and significant levels of practical experience. These jobs, which are suitable for employees of any age, are of particular interest and potentially better suited for people who have worked in the field for several years. Often the most qualified workers are over the age of 50 and might have already completed their first career. Jobs in science, academia, engineering, aviation, customer-relationship management, and employee management often require these types of highly skilled employees.

**Hard-to-retain, entry-level jobs**
There is an ever-growing number of people that have retired from a first career, but are not quite interested in exiting the work force. Many of these people indicate that they are not interested in starting another career, but rather are looking for entry-level employment to earn extra spending money and to eliminate boredom. These people are often highly motivated, loyal employees who are more interested in staying in low-level positions than their younger colleagues who are seeking advancement within the organization.

**Managerial positions**
Experience is one of the most important qualities of an effective manager. People over 50 often have a significant amount of experience in a particular occupation and make excellent managers and mentors. In many cultures, seniors are given implicit respect that transcends from the social to the professional, giving these people certain credibility with those whom they manage.

**Strategic/visionary jobs**
History repeats itself and the best way to see into the future is often by reflecting on the past. People over 50 have a distinct advantage over younger employees in that they have a history of successes and failures that helped them develop a clarified vision of the future. Corporate strategy is often a matter of choosing what paths to take to lead to prosperity. People with previous careers or an extensive history in a particular field can help organizations avoid previously identified pitfalls and provide guidance based on their institutional and historical knowledge.

Name some highly skilled jobs that might be great for older workers
As we progress further into the information age, highly skilled jobs are becoming more plentiful and predominate. Some of these jobs include: corporate training, human resources management, academic research and educators, scientists, medical professionals, engineers, computer and telecommunication professionals, airline pilots, and many others.

What qualities might older workers possess that make them good managers?
Managers over the age of 50 are often more confident, mature, patient, and emotionally stable than managers who are early in their careers. They gained these qualities through years of events, experiences, and perspectives. Managers over 50 are often more likely to stay with a company than their younger counterparts. Further, people over 50 are less likely to have pressing external factors, such a dependent children and personal financial concerns, which allows them to focus on their jobs more deeply.

How can an historical perspective shape the vision of the future?
Knowing what not to do is as important as knowing what to do. Lessons learned from the past can help an organization develop a focused strategy for future development. Employees over 50 have a professional and personal history that can guide an organization down a path of prosperity, while avoiding pitfalls that they have already discovered through previous experience.
PARTICIPANT ANSWER KEY

How can an organization specifically attract workers interested in a second career?

The following answers are key points in the primary and secondary discussion questions. Use this guide to check the answers on your Participant Worksheet.

As life expectancy increases and American middle-class wages stagnate, the majority of middle-aged workers in the United States are often unprepared to fully retire until later in life. Many government and safety-regulated employees have fixed end-of-employment deadlines (e.g. airline pilots are required to retire at age 65, and some government employees must retire after a certain number of years on the job), which makes them prime candidates for second careers.

Work with the military
The United States military has several programs designed to help place retiring veterans in suitable second careers. Many branches have specific transition-assistance centers that work with businesses and organizations to identify qualified candidates for available positions. There are also several non-profit organizations that work with veterans to help place them in second careers.

Retire rehire
During an employee’s exit interview, ask if the retiring employee is interested in continuing to work with the organization. Look for types of work that he or she might be interested in and give the person an opportunity to come back when he or she is ready to return to work. Some experts suggest offering retirees a consultancy position to allow for knowledge transfer to replacement employees.

Provide appropriate opportunities
Create opportunities and positions that are attractive to older, more experienced workers. Consider creating part-time or flexible work-schedule positions that allow older workers to contribute to the organization while enjoying the freedom of partial retirement. For people interested in a full second-career, consider adding benefits specifically tailored to their needs, such as adult dependent care and low-cost health insurance.

Think outside the network
It is important to recruit older workers through a multitude of channels. Online services like monster.com and other internet-based résumé systems might not adequately identify the “soft skills” that are often a key reasons to hire older workers. It can be quite difficult to quantify the value of one’s experience in a résumé, and even harder for a computer system to parse and match those people with an organization’s needs. An organization should consider interpersonal networking events, recommendations of current employees, and advertising in media that are used by people over 50 (e.g. newspapers, magazines, radio).

How can a recruiter match available positions with roles in the military?
The government provides a list of military roles and their accompanying responsibilities. This list provides a window into a soldier’s experience and can help human resource recruiters identify suitable candidates for positions in their organizations. There are also many online resources that provide a crosswalk between civilian job classes and military career tracks.

What are some limitations associated with re-hiring retirees?
Some candidates might not be eligible to work until a waiting period has elapsed since their previous career. This is particularly common with government-pension retirees. Also, those people who draw social security retirement benefits are limited to a certain amount of money they can earn each year before they are no longer eligible to receive social security benefits.

List a few ways to recruit employees over the age of 50
There are several businesses that specialize in jobs for older workers – retirementjobs.com, retireecareers.com, and seniors4hire.org, just to name a few. Many agencies have partnered with AARP to connect older job seekers with organizations. Other options include networking through local churches, schools, military bases, and social organizations like the Rotary Club or other affinity groups.
PARTICIPANT ANSWER KEY

The following answers are key points in the primary and secondary discussion questions. Use this guide to check the answers on your Participant Worksheet.

Statistics show that the number of unemployed and under-employed people over the age of 50 is significantly higher than younger workers. The evidence shows that most small businesses operate with a set of biases toward older workers that are based on inaccurate and patently false assumptions.

**Cost of healthcare**
Many organizations have traditionally shied away from hiring older people for the fear of increases in healthcare costs. These assumptions are false. In fact, older workers typically use less health insurance than younger workers who are having families and taking care of children. Moreover, many of the increases in insurance premiums due to the age of employees can be offset through a series of proactive measures to help curb healthcare spending. Some of those programs include health and wellness programs, company-provided athletic facilities, and other loss-prevention strategies. In New York, and many other states, legislatures have prohibited insurers from considering employees’ ages when selling group policies. As of 2014 under the affordable healthcare act, insurers that base their rates on age are limited to a 3-to-1 ratio between the premium of the oldest and youngest employees.

**Not interested in learning**
It’s never wise to assume that an old dog can’t learn new tricks. At the National Institutes of Health it was found that older workers desire challenges and changes to keep them fresh and motivated even more so than their younger counterparts.

**Technophobic**
People over that age of 50 are often assumed to have a phobia about technology. In reality, people over the age of 50 look at technology as a tool or a way to complete a job. They are not typically interested in using technology for social purposes, which is actually beneficial to an organization that might struggle with the distractions caused by technology for younger employees.

**Increased labor costs**
It is true that people with experience might demand a higher pay rate. This increase in hourly pay can be offset by a decrease in the number of hours worked. Many people over the age of 50 are interested in flexible and part-time work arrangements, and that translates to budgetary savings. Also some assume that older people work at a slower pace and are often less productive than their younger counterparts; however, evidence suggests that this is not true and that with proper training older workers operate more efficiently than those with less experience.

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**What benefits accrue when employees over the age of 50 lack interest in social technology?**
Focus and lack of distractions are the two greatest benefits of older workers’ lack of interest in social technology. As Twitter, Facebook, and LinkedIn creep into offices around the world, employee productivity has taken a hit. People over the age of 50 tend to look at technology as a means to productivity, rather than as a tool for social connectivity.

**In what ways has Obamacare (The Affordable Care Act) changed the landscape for hiring older people?**
The Affordable Care Act (Obamacare) has set limits on the premium costs for group healthcare plans. It has also eliminated the costs associated with preexisting conditions and extended the eligibility of dependent children. These changes in the Healthcare laws have made the overall cost of healthcare more predictable and equally distributed across participating employees.

**What are some ways to help older workers become engaged with technology?**
People who entered the work force prior to the dawn of modern technology have a different relationship with computers and software than their younger counterparts do. In some ways, this difference is a significant advantage for older workers, in that they can be trained to use a system or software package exactly as it is intended to operate without any preconceived expectations. Providing adequate and comprehensive training to these workers can make them highly productive with the same levels of efficiency as younger workers.
How can an organization help resolve generational conflicts?

Conflicts between generations happen in every aspect of life. At the workplace, conflicts surface as a result of differences in work ethics, expectations of teamwork, and generalized worldviews. Resolving these issues requires an attempt to seek understanding and find common ground. Organizations must help all parties to a conflict to look at how their behavior affects the big picture, and come up with a plan to address the conflict such that each side feels understood.

Mentorships to the rescue
Mentorships are one of the most effective, proactive measures an organization can implement to prevent conflicts between generations. Creating interpersonal relationships between colleagues of different generations can help avoid misunderstanding and prevent under-communicated expectations. Two-way mentorships are particularly effective in that an organization highlights that each person has value in the relationship and that each side should attempt to learn as much as it can from the other.

Ombudspersons
The role of the ombudsperson is to be the professional mediator when conflicting persons cannot resolve issues themselves. The ombudsperson can act as a liaison between the employees and the organization as well as between two conflicting employees. The ombudsperson should have a deep understanding of the fundamentals of conflict resolution, namely uncovering assumptions, focusing feedback on specific behaviors and their impacts, identifying the underlying interests behind the conflict, and creating open channels for dialogue and communication.

Offer benefits that benefit everyone
It is important for organizations to treat every employee equally and to provide benefits that are desired by all employees. Further, just because an employee deems a benefit important, the employee might not use that benefit. This gap between value and utilization provides an opportunity for an organization to offer benefits for employees that appeal to different generations without significantly increasing cost and without creating an unintentional bias toward one generation over another. A great example of a benefit that is valued by all but not used by everyone is an all-age dependent-care benefit. By providing care for dependent children as well as dependent adults, employees of all generations value the benefit even though not everyone will have an opportunity to utilize the service.

Build on a strong foundation
Similar to the way mentorships work, it is important that employees are encouraged to build on existing procedures, technologies, and processes to create future products and services. Recognizing the value of an organization’s legacy business activities while providing opportunities to improve them will help prevent conflicts between older and younger workers.

How does an organization establish a mentorship program?
An organization should evaluate the strengths and weaknesses of each employee and find people who could benefit from each other’s influence. Ask for volunteers to be mentors/mentees, and incentivize the participants. Suggest topics that a mentor might want to address to improve the mentee’s performance, and remind each participant that the program is a two-way experience, so that ideas and improvements flow bi-directionally.

Name some benefits that will appeal to people over 50.
People over the age of 50, particularly those who are into their second careers, are often interested in an adult dependent-care benefit. They might also be interested in flexible work schedules, telecommuting, penalty-free unpaid time off, on-site exercise facilities, low-cost healthcare (e.g. HMOs or heavily subsidized health plans), and 401(k) match programs.

What are the risks of not valuing an organization’s legacy processes and systems?
Advances in technology happen at an extremely rapid pace. To the new generation workers, technologies and systems built five years ago might appear outdated and less efficient. A rift between generations can happen when young employees do not value the processes and systems created by their older colleagues. Organizations should work hard to implement new business processes and systems that respect the accomplishments of the past while taking advantage of newer innovations.
What types of programs and benefits might be of interest to workers over 50?

The following answers are key points in the primary and secondary discussion questions. Use this guide to check the answers on your Participant Worksheet.

There are many programs and benefits that an organization can setup to attract and retain workers over 50. These benefits will likely be of value to all employees, but might have particular value for people over 50.

**Health and wellness programs**
Many people over the age of 50 have a heightened interest in their physical health; with age comes the need to take better care of one’s body. Common ailments associated with age, including arthritis, heart disease, diabetes, and others, can be avoided or slowed by a routine of adequate exercise and attention to one’s nutrition levels. Employees, particularly those over 50, are attracted to organizations that provide and encourage the use of exercise facilities and wellness programs for their programs.

**Eldercare and backup dependent care**
One of the side effects of the global increase in life spans is that people nearing the end of their professional careers are finding that they need to take care of their aging parents. In America, nearly 40% of all workers are tasked with elder-care responsibilities. An organization can provide a form of insurance called “eldercare” that works similarly to dependent-child insurance. Many insurance companies have started to allow workers to enroll their parents as dependents on healthcare plans. Many home healthcare and visiting nurse organizations have started to partner with companies and organizations to offer backup dependent care for employees who cannot take care of their elderly dependents due to career-related responsibilities. These programs allow an organization to retain workers longer and help keep workers focused on their jobs.

**Emeritus programs**
Many organizations have implemented emeritus programs. These programs allow retirees to come back to work on a part-time (or as-needed) basis. Retirees can serve as consultants, mentors, or even front-line workers, depending on their interest and availability. These programs provide access to institutional knowledge that walks out the door when an employee retires.

**Phased-retirement program**
Phased-retirement programs work in several ways; however the most common method is to take a job, split it in half, and hire a new employee to do half the work that the retiree is forgoing. There are many benefits to this type of arrangement. For the organization, these programs help transfer knowledge from the outgoing retiree to his or her replacement. For the retiree, it gives him or her a chance to keep active with the company but also enjoy increased amount of time off work. New employees also benefit from these programs by having a solid window of time to learn a job from the people who know it best.

**Flexible work arrangements**
People over 50 often have many personal responsibilities outside of work. Children, grandchildren and dependent parents can require their attention. When possible organizations should offer flexible work arrangements – teleworking, flexible scheduling, part-time work – to accommodate these employees’ needs. These work arrangements allow older workers to remain active employees with an organization while taking care of the personal matters that often cause people to exit the workforce prematurely.

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**How can a small organization provide health and wellness benefits?**
Small organizations can partner with local gyms and wellness clinics to provide group discounts for employees who use the facilities. They can also get involved in multi-employer group packages similar to the way health insurance plans are provided for small businesses, so their employees have access to wellness programs (nutrition, counseling, yoga, physical therapy, and others).

**What are some key elements of eldercare services?**
Eldercare is a generalized term for those things that enable employees to care for their aging parents. Most often eldercare is simply adding a parent as a dependent on an employee’s health insurance benefits. Other services include backup dependent care, which provides on-site services for elderly relatives while a person is occupied by work obligations, and prescription-drug benefits.

**How can phased-retirement programs help slow the loss of institutional knowledge as Baby Boomers enter retirement?**
Phased-retirement programs help keep retiring employees in the workforce longer. Some programs offer to split a full-time job into two part-time jobs, while other programs offer employees an opportunity to defer retirement while drawing from pensions and putting those funds into a private IRA. The idea is to keep people in the work force longer, so that knowledge transfer can happen in an affordable, reliable way.
PARTICIPANT ANSWER KEY

What benefits might older workers bring to an organization?

There is a high cost to employee turnover. The cost of replacing employees can be overwhelming for an organization. Hiring people over the age of 50 can help an organization build and maintain a dedicated and reliable workforce that in turn provides significant long- and short-term savings. Some of these savings can be used to train older employees on technological tasks that are not second nature for them, like they are for younger employees. Older-generation workers’ have unique values and skills that translate into time and money savings for an organization. An organization should consider the costs associated with high turnover within a more youthful workforce, versus the experience and maturity found in older workers.

**Punctuality**
Most older workers enjoy going to work each day, which makes them more likely to arrive on time and ready to work. Morale within an organization is often influenced by attendance and can have a profound effect on a team's ability to function efficiently. Older workers take punctuality seriously and understand that it sets the tone for an effective work environment.

**Setting an example**
Older workers generally strive to live up to any outlined expectations, providing an intangible value to an organization. This behavior makes them role models and mentors to their coworkers, which helps simplify the training of other employees.

**Efficiency and confidence**
Older workers have the experience-backed confidence to provide recommendations and share ideas, making them ideal employees. They save organizations time and money through a greater understanding of how their jobs can be completed more efficiently. Experience also contributes to confidence, which helps workers make informed, independent, intelligent decisions on behalf of the organization.

**Experience and leadership**
Research demonstrates that the number-one method to broaden and deepen leadership capabilities is through experience. Older workers have years of on-the-job experiences that provide frameworks for thinking and talent development.

**Focused and undistracted**
Older workers are generally at a point that their lives are less chaotic than those of younger workers. Their schedules are a little more routine, and their ability to focus is enhanced by fewer distractions.

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**How does punctuality relate to efficiency?**
Lack of punctuality not only affects the organization, it affects the employees. It can lead to resentment, indifference, and poor performance, as well as a breakdown in communication, as important information can be missed. A harmful division between employees who are punctual and those who are late can be created that lowers the organization's morale. Punctuality is a work ethic to aspire to and tends to boost the morale of everyone in the company. Punctuality reflects an excitement and commitment to an organization.

**How does confidence save an organization time and money?**
A confident employee uses creativity to develop new processes that add value to the work environment, which, in turn, serves customers more efficiently. These new perspectives and initiatives keep organizations on the leading edge of their industries and ahead of their competition. Confident employees are able to make decisions independently and move forward on projects and tasks without the need for constant direction and supervision by management.

**What external factors change over time that allow older workers to be more focused?**
There are many developmental challenges faced in the course of one's life that are overcome over time. These challenges include financial issues, family upbringing, and matters of social concern. Other factors include confidence in one's ability, stabilization of housing and transportation needs, and the progression of children's lives.
PARTICIPANT ANSWER KEY

The following answers are key points in the primary and secondary discussion questions. Use this guide to check the answers on your Participant Worksheet.

There are competencies and personality traits that older workers share. Older workers bring unique skills and values to an organization that are hard to quantify in a résumé and can easily be overlooked. Some characteristics that many older workers possess can directly contribute to, and positively impact, an organization's bottom line.

**Dedication**
Dedicated workers produce higher-quality work. Workers over the age of 50 tend to be highly dedicated to the job – either from the fear of not being able to find replacement work or as a carry-over of the personal work ethic often found in the baby-boomer generation. This dedication results in an attention to detail that can help identify potentially costly mistakes.

**Detail-oriented, focused, and attentive**
This skill is something that is developed and ingrained in a worker through past lessons and experiences. These lessons have taught them to use a focused and concise effort to complete the task at hand. Workers over the age of 50 tend to have the patience and determination to explore the intricacies of a problem until a suitable solution has been discovered.

**Good listeners**
Older employees have a well-developed sense of learning and information retention. Often workers over 50 know what is required (i.e. taking notes and reviewing advice) to retain what they are being told. They are also frequently good people to use as a sounding board for ideas and concerns since they have likely experienced similar situations in their work histories.

**Pride in a job well done**
Older-generation employees feel a sense of ownership in their work and take pride in the final product. Older employees are also willing to stay later and put in the extra effort when necessary to ensure the final outcome is refined and presentable. People entering a second career often desire a sense of pride in their work and look for meaning and value in their accomplishments.

**Communication skills**
Communication skills can be learned early in a career, but are honed through many years of experience. There are times when situations involve more than just facts and require a level of judgment when communicating about them. These situations often require employees to speak with poise and diplomacy and know what to say and how to say it so that the situation is defused.

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Why do older workers tend to be more dedicated to a job?
Many employers find that young employees have a higher turnover rate than people over 50. Often, the hiring process is unable to sort out which employees will stay with a company for an extended period of time versus those who will work a few months and decide to move on. People over 50 tend to be less mobile in their careers, and they appreciate their jobs more than employees who can often find new work with little effort.

How does pride in one's work translate to a job well done?
Pride in one's work tells a lot about a person's character. Having completed something to the best of one's ability not only shows dedication, but respect for oneself, one's co-workers, and one's organization. Those employees who have pride in their work tend to put in the effort to see a project through to its completion, and to fulfill their role requirements to the fullest.

Discuss the differences between Generation-X and the Baby Boomers and how those differences can impact an organization.
Discuss in your study group the differences between the two generations. Consider professional and personal characteristics and how the traits of each generation can complement each other's strengths and weaknesses.
The following answers are key points in the primary and secondary discussion questions. Use this guide to check the answers on your Participant Worksheet.

The Human Resource department in an organization can help retain older workers by identifying the needs of individual workers and putting together workable solutions that keep people interested in staying with the company in some capacity beyond their planned date of retirement. Making special considerations for the needs of these workers will likely benefit the entire body of employees.

### Advocating for programs
There are many retirement-deferment plans implemented in today’s workforce. HR should work with upper management to put together a few deferment packages that address the needs of the company while respecting the desires of the employees. A phased-retirement plan, which addresses the loss of institutional knowledge by splitting a job into segments and allowing the retiree to work part-time, is a cost-effective way to protect the organization from knowledge loss associated with turnover. A traditional deferred-retirement plan allows people to begin drawing from a pension fund prior to retiring fully. These programs help keep people working longer, which can be beneficial for knowledge transfer and business continuity.

### Identify incentives that work
Begin by surveying aging employees to find out what incentives would keep them employed longer. Many organizations have found that offering extended contributions to retirement-saving plans, additional sick-leave hours, and contributions toward short- and long-term disability insurance has worked to help draw employees into deferred retirement plans. Also, employers have found that creating meaningful work for older workers helps to retain them longer.

### Tailor roles specifically for older workers
Retaining older workers might be as simple as reclassifying their roles in the organization. Look at the productivity demands of the organization and design streamlined roles that allow older workers to stay with the company on a part-time, or as-needed, basis while giving them flexibility to enjoy their later years. The streamlined roles should seek to eliminate sub-peak performance times, thereby maximizing the efficiency of the organization.

### Keep older workers learning
The best way to keep a worker with the organization is to keep him or her from feeling stagnant. Never stop investing in the training and education of workers, particularly among workers over 50. Often older workers see their employment as an outlet for their creativity and mental activity. By keeping these people learning, they are less likely to become bored with their positions and more likely to keep working for their organizations.

### What is a “DROP” plan?
A DROP (Deferred Retirement Option Plan) is a program under which an employee who is eligible to retire and receive benefits under a defined-benefit retirement plan chooses to continue to work. Instead of having the additional years of service taken into account for the defined-benefit plan, the employee has a lump-sum of money put into a separate interest-bearing retirement account. The balance of the account is paid to the employee when he or she retires. Often these programs add as many as five years of work to a person’s career.

### Name some incentives that can keep employees working longer.
There are many opportunities for an employer to keep employees working longer. Flexible work schedules, flexible work hours, flexible work locations, telecommuting, deferred retirement programs, redefined roles and career flexibility, advanced and technical training, disability management, and simple things like ergonomic considerations and workplace comfort all contribute to a person’s decision to keep working into the traditional retirement years.

### What are some ways to keep older workers learning?
Older workers respond well to feeling valuable. Organizations can instill confidence in their older workers by continuing to invest in their education and professional development. Encouraging older workers to attend industry and trade workshops and events helps assure an older worker of his or her value to the company.
PARTICIPANT ANSWER KEY

The following answers are key points in the primary and secondary discussion questions. Use this guide to check the answers on your Participant Worksheet.

How can hiring older workers reduce labor costs?

It is quite common for older workers who are entering their second careers to have health insurance plans from previous employers. Often they may have an additional source of income and be willing to take a smaller wage to obtain a position they want. Workers over 50 understand that working for a company is much more than just collecting a paycheck. The key to hiring and retaining these workers is to provide meaningful work that gives their efforts a sense of purpose. Workers in their second career who feel valued by their employers are far more likely to stay with a job, resulting in a significant reduction in the cost of employee turnover.

Part-time employment
There are many older workers who are interested in working part-time for the purpose of supplemental income and staying active. They often have healthcare benefits from their first career and wish to work for a company they admire for a fair, if not modest, rate of pay. Hiring older workers to cover part-time positions is a great way to attract dedicated and loyal employees without the risk of high turnover and the eventual desire for a promotion. In some organizations a differentiation between part-time and full-time employment is eligibility for benefits, such as paid vacation days, sick leave, 401k matching and health insurance.

Fewer unexpected absences
Several studies of older workers have revealed that one of the leading benefits of hiring them is that they are more typically punctual and have a significantly lower rate of unexpected absences. These qualities reduce labor costs by allowing an organization to hire fewer, more reliable workers. Unexpected absences can reduce an organization’s morale, productivity, and profitability.

Lower turnover ratio
The market for workers over the age of 50 is still very limited. Once an older worker has a job, he or she tends to value it more than his or her more mobile, younger colleagues, and is, therefore, less likely to leave. The cost of turnover can be crippling for an organization. Hiring workers who are interested in staying is a wise financial decision.

Efficiency is key
The myth that older workers operate more slowly than younger counterparts is categorically false. Evidence suggests that properly trained older employees are as productive as younger employees. The key is to utilize the most advanced methods, processes and technologies to accomplish work.

In what ways does part-time labor reduce expenses?
Part-time labor offers many cost-saving advantages for organizations. When employees desire part-time work, it can be a great tool to get work done without the added expenses of full-time employment requirements. Typically, most part-time workers do not receive health insurance, paid time-off, and retirement benefits, thereby saving the organization expenses related to granting these benefits. Part-time work is often on an as-needed basis, meaning when demand is high employees might be able to work more hours than when demand is low.

What are some costs associated with increased levels of employee turnover?
The costs of employee replacement – recruiting, interviewing, hiring, and training – are some of the largest expenses related to employee turnover. Beyond simply replacing workers, turnover creates deficits in production and efficiency. These deficits can result in real costs for the organization when its gross product is less than expected. High turnover rates can negatively impact employee morale, which can lead to a less efficient workforce.

How can workers over 50 increase the efficiency of a workforce?
Workers over 50 often have deep levels of experience and a commitment to doing things right. The more experienced a worker is, the less likely he or she is to make costly and time-consuming mistakes. Experience implies a level of knowledge that is gained by both successes and failures, and those lessons serve to make people more efficient workers. Beyond life experience, with age comes the desire to do things correctly the first time. Many people over 50 are not interested in wasting time with a trial-and-error philosophy, but rather are interested in researching and following well-documented best practices.
Mentorship programs keep learning alive in an organization. By encouraging a learning culture through mentoring, leaders ensure that employees take an active role in spreading best practices throughout an organization. This collaboration develops individuals professionally and interpersonally, thereby increasing employee engagement. Mentoring enables both career and leadership development to help employees sharpen skills and become more valuable to their organizations.

**Teach an old dog new tricks**
Reverse mentoring is essentially a two-way channel for collaboration between younger employees and older employees. Such a partnership provides younger employees a chance to see the larger picture, while giving older workers insight into the perspective of the younger workers. Often younger workers communicate the latest trends in technology, management styles, and modern means of interpersonal communication. When implemented properly, reverse mentoring can help older workers stay relevant and current with the latest advances and trends both professionally and socially.

**Build on a foundation**
Mentorship encourages older employees to share their career-long findings and discoveries with young employees. These foundations ensure a level of continuity from generation to generation and give older workers a sense of value for their accomplishments. Beyond simply teaching younger employees how things have been in the past, mentorships offer older employees a second perspective that might help them overcome any obstacles or ongoing issues.

**Jumpstart ideas**
Collaborative work between young and older workers can lead to some breakthrough advances in products and services. Organizations that bring together two generations of workers to work on a project will find that ideas percolate faster, obstacles are overcome more easily, and outcomes are achieved in a more expeditious and complete manner. This collaboration can extend beyond a single mentor/mentee relationship to involve several employees throughout an organization.

**The things not documented**
Mentorships are a way of passing information from older workers to younger workers about things that are not easily documented. Institutional knowledge, corporate culture, experiential insight, and other intangible lessons are nearly impossible to quantify into an employee manual and are best passed on by word of mouth and the actions of employees.
Five lessons for recruiting and retaining workers over 50.

1. **The culture and mission of an organization must be consistent with its practices.** Practices that support older workers are unlikely to be successful if the culture does not support them.

2. **Practices that support a particular population should also support other groups of employees.** NIH has learned and published research has shown that even if all employees don’t use a particular benefit, knowing that benefit is available to them is just as important as actually using it.

3. **Don't let myths about older workers drive the assumptions you make or the programs you develop.** For example, NIH learned that assuming you can’t teach an old dog new tricks is absolutely false. Conversely, it found that older workers craved changes and challenges to keep them fresh and motivated.

4. **Although older workers staying longer in jobs might seem to slow down the career progression of younger workers, this does not have to be the case.** NIH found that having older workers mentor younger workers and having younger workers mentor older workers, it experienced a higher level of engagement and scientific discovery that lead to greater opportunities for younger workers.

5. **Don't assume that all employees in any group have identical needs.** NIH used regular surveys to identify employee needs but also tailored programs to meet the needs of highly talented older workers. For example, it created an emeritus program to bring back mature, highly talented workers to meet specific critical needs.
Sally J. Rockey, Ph.D., Deputy Director of Extramural Research

Dr. Rockey is the Deputy Director for Extramural Research, leading extramural research activities at NIH. The Office of Extramural Research (OER), where she also serves as Director, is the focal point for policies and guidelines for extramural research administration within NIH and in partnership with the biomedical research community.

Dr. Rockey began her federal journey at the U.S. Department of Agriculture’s Extramural Research arm, where she quickly rose to the post of Deputy Administrator for the Competitive Research Grants and Award Management Unit of the Cooperative State Research, Education, and Extension Service, overseeing the extramural grants process and portfolio. She became Chief Information Officer, applying her breadth of government knowledge to IT, aligning state-of-the-art information technologies with the department’s goals and objectives. She was appointed to the position of Deputy Director of OER within the Office of the Director at NIH to bring her extensive experience in research administration and federal assistance to the biomedical research community.

Dr. Rockey received her Ph.D. in Entomology from Ohio State University, and has spent the majority of her career in the area of extramural research administration and information technology. She leads or is active on a number of Federal committees related to science, research administration, and electronic government and collaborates closely with academic and scientific communities.

Alfred Johnson, Ph.D., Director, Office of Research Services

Dr. Johnson is the Director of the Office of Research Services, managing and providing technical and administrative services to all components of NIH in support of the research mission, including programs for public safety and security operations, scientific and regulatory support programs and a wide variety of other employee services.

Dr. Johnson has over 20 years of experience as an NIH researcher and administrator. His prior positions include: serving as Assistant Director for the Office of Intramural Research; acting Director of the Office of Loan Repayment and Scholarship; Director of the NIH Undergraduate Scholarship Program; and an Investigator in the Laboratory of Molecular Biology at the National Cancer Institute.

Dr. Johnson completed his Ph.D. in biomedical sciences at the University of Tennessee, and completed his undergraduate degree in chemistry at Albany State University. He performed doctoral research at the biology division of Oak Ridge National Laboratory and began his NIH career as a postdoctoral staff fellow in the NCI Laboratory of Molecular Biology.
Phil Lenowitz, Deputy Director, Office of Human Resources
Philip Lenowitz is the Deputy Director of Human Resources at the National Institutes of Health. In his current role as the NIH Deputy Director of Human Resources, Mr. Lenowitz oversees the delivery of HR services – from recruitment and hiring to education and training – to the NIH workforce of 19,000 employees.
Mr. Lenowitz began his career in human resources with the Veterans Administration. After five years, Phil began a second career as a stock options trader on the floor of the Philadelphia Stock Exchange and later formed his own broker-dealer company. He spent 11 years in this second career before returning to employee and labor relations at VA Medical Center.

Mr. Lenowitz began his NIH career in the Human Resources office at the National Institute of Environmental Health Sciences (NIEHS) in Research Triangle Park, North Carolina. He then moved on to become NIH’s Director of Employee and Labor Relations and later assumed his current role as NIH Deputy Director of Human Resources. Mr. Lenowitz received his Bachelor’s Degree in Industrial and Labor Relations from Cornell University.

Lawrence A. Tabak, D.D.S., Ph.D., Principal Deputy Director
Dr. Tabak is the Principal Deputy Director of the National Institutes of Health (NIH). He previously served as the acting Principal Deputy Director of NIH before assuming his current role, and as director of the National Institute of Dental and Craniofacial Research.

Prior to joining NIH, Dr. Tabak was the senior associate dean for research and professor of dentistry and biochemistry & biophysics in the School of Medicine and Dentistry at the University of Rochester (NY). A former NIH MERIT recipient, Dr. Tabak’s major research focus is the structure, biosynthesis and function of glycoproteins. He continues work in this area, maintaining an active research laboratory within the NIH intramural program in addition to his administrative duties.

Dr. Tabak is an elected member of the Institute of Medicine of the National Academies. He received his undergraduate degree from City College of New York, his D.D.S. from Columbia University, and a Ph.D. from the University of Buffalo.
Valerie Gill, Director, Client Services Division
Valerie Gill joined NIH as the Director of the Client Services Division for the Office of Human Resources. In this role, Ms. Gill has stewardship responsibility for NIH’s recruitment, classification, pay setting, delegated examining, and commissioned corps programs. Her responsibilities include providing leadership and direction to HR professionals that serve as the first and primary point of contact for IC leadership, supervisors, and employees in the delivery of NIH HR operational services.

Prior to joining NIH, Ms. Gill spent 17 years in the Intelligence Community supporting the National Geospatial-Intelligence Agency and the Central Intelligence Agency. She served in a variety of leadership positions and directed a broad range of Human Capital programs such as recruitment, policy development, employee relations, HR consulting, employee development, organizational development, and workforce planning. Valerie holds an undergraduate degree in business from Towson University and a Master’s degree in Human Resource Management from The George Washington University.

Colleen Barros, M.A., Deputy Director of Management
Ms. Barros has served in a variety of Federal administrative positions with special expertise in managing technical and scientific information systems and in R&D management. She began her career with NIH as a Budget Analyst and served as Senior Administrative Officer in the NIH Office of the Director. In that position she was responsible for directing the efforts in establishing several new offices such as the Office of AIDS Research, the Office of Human Genome Research, the Office of Research on Minority Health, and the Office of Alternative Medicine.

Ms. Barros was later selected as the Associate Director for Administration in the National Institute on Aging where she received several awards for her outstanding contributions toward improving the administrative operations of both the NIH and the NIA. In 2004, Ms. Barros joined the Office of the Director again as she took on the role of Acting Deputy Director for Management after which she was appointed to her current role as Deputy Director for Management. She received her M.A. in Public Administration from American University.
Sally Lee, Executive Officer, National Institute of General Medical Sciences

Ms. Lee is the Executive Officer at the National Institute of General Medical Sciences. In this role, she oversees the administrative functions, including financial management, information technology, and management analysis. She also advises senior officials on administrative management issues and their implications for NIGMS scientific programs.

Ms. Lee joined NIGMS at NIH as an administrative technician and later became a management analyst. She served as the institute’s acting Associate Director for administration and operations during her NIGMS career. She rose through the ranks of NIGMS to Deputy Executive Officer, before assuming her role as Executive Office. She earned a B.A. in history from the University of Maryland, College Park.

Julie Berko, Director, Workforce Relations Division

Julie Berko is the Director of the Workforce Relations Division in the National Institutes of Health, Office of Human Resources. She manages numerous NIH-wide programs including employee and labor relations, performance management and incentive awards, employee benefits & retirement, leave administration, workers’ compensation, and personnel action and payroll liaison action functions.

Prior to joining the NIH, Ms. Berko worked at the Federal Aviation Administration where she created their WorkLife program that included the employee assistance program, telework, child care, and wellness. She also implemented a pilot program for geriatric care management and HR concierge services (the first of its kind in an Executive agency) to address the needs of employees with work and family challenges. She holds a Bachelor of Arts in Sociology from Howard University and Master of Public Administration from American University.