

**Author:** Javor, Tanya L.

**Title:** *Training and Development of the Mature Worker*

The accompanying research report is submitted to the **University of Wisconsin-Stout, Graduate School** in partial completion of the requirements for the

**Graduate Degree/ Major:** MS Degree Training and Human Resource Development

**Research Advisor:** Sally Dresdow, DBA

**Submission Term/Year:** Spring 2018

**Number of Pages:** 41

**Style Manual Used:** American Psychological Association, 6<sup>th</sup> edition

- I have adhered to the Graduate School Research Guide and have proofread my work.
- I understand that this research report must be officially approved by the Graduate School. Additionally, by signing and submitting this form, I (the author(s) or copyright owner) grant the University of Wisconsin-Stout the non-exclusive right to reproduce, translate, and/or distribute this submission (including abstract) worldwide in print and electronic format and in any medium, including but not limited to audio or video. If my research includes proprietary information, an agreement has been made between myself, the company, and the University to submit a thesis that meets course-specific learning outcomes and CAN be published. There will be no exceptions to this permission.
- I attest that the research report is my original work (that any copyrightable materials have been used with the permission of the original authors), and as such, it is automatically protected by the laws, rules, and regulations of the U.S. Copyright Office.
- My research advisor has approved the content and quality of this paper.

**STUDENT:**

**NAME:** Tanya Javor **DATE:** 05-07-2018

**ADVISOR:** (Committee Chair if MS Plan A or EdS Thesis or Field Project/Problem):

**NAME:** Dr. Sally Dresdow **DATE:** 5/10/2018

**This section for MS Plan A Thesis or EdS Thesis/Field Project papers only**

**Committee members (other than your advisor who is listed in the section above)**

- |                        |       |
|------------------------|-------|
| 1. CMTE MEMBER'S NAME: | DATE: |
| 2. CMTE MEMBER'S NAME: | DATE: |
| 3. CMTE MEMBER'S NAME: | DATE: |

**This section to be completed by the Graduate School**

This final research report has been approved by the Graduate School.

Director, Office of Graduate Studies: **DATE:**

**Javor, Tanya L. *Training and Development of the Mature Worker***

**Abstract**

Company XYZ is an industrial supply company located in a suburb of large Midwestern city and employs approximately 100 employees who are approaching retirement. The organization has structured its benefits to encourage long-term employment. However, when employees are over 55 Company XYZ does not currently offer ongoing training opportunities for the mature worker.

This study was conducted to determine if Company XYZ's mature workers, age 55 and older who are currently employed or retired, are satisfied with the existing training as well as determine their level of engagement as they near retirement. Based on the results, recommendations were made to help the organization provide the training necessary to keep the mature worker engaged with their job until they retire.

### **Acknowledgments**

I would like to start by thanking my family for supporting me through this process. I am sure that I spoke to everyone in my immediate family at some point to get their perspective or just to talk through some aspect of my project. I would especially like to thank my newborn daughter, Katelyn, for napping on me for hours at a time, allowing me to complete my paper. A big thank you to my son, Graham, for going to sleep at a reasonable hour so I could spend nights working on my project. I would also like to thank my husband, Michael, for understanding my long nights at the library and helping me decompress.

Finally, thank you to Dr. Sally Dresdow for her continued support. When I was worried about finishing, she was there to motivate me and offer guidance.

**Table of Contents**

Abstract .....2

List of Tables .....6

Chapter I: Introduction.....7

    Statement of the Problem.....8

    Purpose of the Study .....8

    Assumptions of the Study .....9

    Limitations of the Study.....9

Chapter II: Literature Review .....10

    Reasons Mature Workers Remain in the Workforce .....10

    The Stereotypes of the Mature Worker.....12

    Engagement of the Mature Worker.....14

    Training for the Mature Worker .....17

    Figure 1: Kolb's Experiential Learning Cycle .....18

    Figure 2: Kolb Learning Style and Cycle .....20

    Conclusion .....22

Chapter III: Methodology .....23

    Subject Selection and Description .....23

    Instrumentation .....23

    Data Collection Procedures.....24

    Data Analysis .....24

    Limitations .....24

    Summary.....24

Chapter IV: Results.....	25
Demographics .....	25
Item Analysis .....	25
Summary.....	30
Chapter V: Discussion, Conclusion and Recommendation .....	31
Discussion.....	31
Conclusions.....	32
Recommendations.....	32
References.....	35
Appendix A: Currently Employed Survey.....	37
Appendix B: Retired Employee Survey.....	39
Appendix C: Individual Development Plan.....	41

**List of Tables**

Table 1: Labor Force Predictions.....	11
Table 2: Kolb's Learning Styles.....	19
Table 3: Survey Questions.....	27
Table 4: Within the Organization, there is a Perception that Workers My Age Do Not Learn to Use Technology at the Same Rate as Younger Workers .....	28
Table 5: Company Benefits .....	29
Table 6: Which of the Following Training Would be Beneficial to You? .....	30

## Chapter I: Introduction

As life spans increase and baby boomers choose to stay in the workforce longer, the need for continuing education and training for this demographic of workers increases. The Bureau of Labor Statistics (BLS) (2015) projected that between 2014 and 2024, the percentage of workers participating in the workforce over the age of 55 will increase by 19.8%. This comes after a 47.1% increase in the participation of this age group from 2004 to 2014. Whether it be for financial reasons or a motivation for continuing purpose in life, employees are putting off retirement more than in the past.

Company XYZ has been in business for over 100 years and is an industrial supplier with five locations across the United States. One of its locations is in the Midwest in a suburb of a large city. This location employs approximately 1,000 people in an office and warehouse setting. The organization has approximately 100 employees nearing retirement, with approximately 25% who have been employed at Company XYZ for at least 25 years.

Company XYZ encourages long term employment and focuses on developing employees to promote long term retention. One of the benefits offered to encourage long term employment is lifetime health insurance. After 35 years of employment or when their time employed plus their age equals 90 years or more, employees are eligible for this benefit. While the company offers this to encourage long term employment, they do not provide continuing training and development for its mature workers. As an employee approaches the traditional retirement age, the company will either move the person to a less intensive department or stop evaluating their performance and no longer invest in their development.

If an employee has determined a retirement age and is performing at a less than optimal level, but not causing harm to the business or employees, management will consider them to be

acceptable. This means that their work is not expected to be at performance levels of a typical employee and they are accepted at their current level of performance until they retire. The company will provide them with necessary training to keep them at an acceptable performance level but will not spend the time to engage and develop them as they would a non-tenured employee. When employees are not provided with continued training and development, they may be unable to perform at optimal levels within an organization, which could decrease their motivation and be detrimental to their overall performance. Then, the company will either suggest early retirement or will sever the person's employment. It would seem that Company XYZ considers mature workers, those ages 55 and up, to be less productive, more resistant to change, and less valuable than other workers in the workforce (Cregan, Kulik, & Perera, 2016).

### **Statement of the Problem**

Company XYZ does not provide ongoing training and development specifically directed at engaging mature workers. They are missing an opportunity to take advantage of the mature workers' valuable knowledge and skills that would otherwise require costly training for inexperienced employee prospects. The lack of opportunities are putting the mature workers at Company XYZ at a disadvantage by neglecting their ongoing training and development.

### **Purpose of the Study**

This purpose of this study was to investigate the level of satisfaction with the training and development opportunities for mature workers. In addition, the level of engagement of mature workers was determined. Upon completion of the study, a plan was developed to increase the engagement and performance of mature employees in their work. Training and development guidelines were formulated for mature employees that would involve them in the process. The data and the guidelines were presented to the organization for future implement.

**Assumptions of the Study**

It was assumed that survey respondents provided honest opinions. It is also assumed that employees are interested in ongoing development opportunities.

**Limitations of the Study**

In regard to this study, the following limitations exist:

1. The results of this study are limited employees from one organization in the industrial supply industry.
2. The results of this study are limited to the participants who responded to the survey.

## Chapter II: Literature Review

Company XYZ encourages long term employment by offering benefits that encourage mature workers to remain loyal to the organization. Although they encourage this long-term employment, the company does not offer training and development specific to the mature worker. Once an employee passes what the organization feels is a tenured time, they will put them into an accepted mode. This means that while the employee may not be meeting expectations, it is accepted that the employee will remain at this level until they retire, as long as they are not harming customer interactions. The organization needs to implement training and development practices specific to the mature workers in order to take advantage of the knowledge and skills that mature workers bring with them and as a way to fill the gap that will be left by the decrease of available workers in the younger age groups. The literature review includes reasons mature workers remain in the workforce, stereotypes, engagement, and training for the mature worker.

### **Reasons Mature Workers Remain in the Workforce**

The mature worker consists of those who are age 55 or older. Baby boomers are people who were born between 1946 and 1964. They make up the largest portion of the mature worker section of the workforce. According to Rothwell (2008), Baby Boomers are generally thought to have a demanding work ethic. While the mature worker demographic has increased so does the percentage of those who are nearing retirement age, yet they intend to continue to work (AARP, 2015). Since this age group is choosing to stay in the workforce longer, organizations need to change their views of the mature worker to ensure their optimal performance (Paullin, 2014).

**Demographics.** Over the next 10 years, the percentage of mature workers remaining in the workforce, is predicted to increase more than any other age group (AARP, 2015; Paullin,

2014). Of the group of mature workers seeing the largest increase will be those workers who are aged 65 and up with an estimated increase of 74% remaining in the workforce (Paullin, 2014).

Table 1 illustrates the labor force predictions. While the mature worker age group increases, the other age groups will decrease or grow slowly in comparison. This means that companies will need to work to take advantage of this growing mature population to fill the void that will be left by the decreases in the other age groups.

Table 1

*Labor Force Predictions*

Age	Growth 2002-2012 (Actual)	Growth 2012-2022 (Projected)	Total Labor Force in 2012 (mill)
16-39	-3%	4%	70.4
40-49	-6%	-6%	34.5
50-59	28%	-2%	32.5
60-69	72%	40%	14.2
70+	65%	89%	3.3

Note: Adapted from AARP, 2015

**Reasons for staying.** There are a variety of reasons why mature employees stay in the workforce beyond what has been a typical retirement age. AARP (2015) commissioned AON Hewitt to report on the cost and benefit of employing workers age 50 and older. In addition to this report, 18 large employers, with 500 or more employees, were interviewed to gain additional insight, specific scenarios, and case studies (AARP, 2015). According to the report from AARP (2015) the most prominent reason for people stay in the workforce longer is finances. It may be an immediate financial need or a future need such as a larger retirement fund. The financial need

may stem from the recession which caused many people nearing retirement age to lose a significant percentage of their retirement funds (AARP, 2015). In addition, increased life expectancies mean that individuals must plan, on average, for an additional three years of financial support after retirement. Employees also find self-fulfillment in working to maintain social relationships and ensure they are psychologically well (AARP, 2015).

According to the AARP report (2015), mature workers considered enjoying the job or enjoying working as the second most important factor as to why they continues to work. In addition, the rate at which mature employees cited non-financial reasons for remaining in the workforce actually increases with age (AARP, 2015). Considering this, it can be assumed that employees continue to take pride in their work as they age and can continue to be valuable employees when provided with the appropriate training and development. Companies that choose to retain and develop this section of the employment population can take advantage of a committed group of workers.

### **The Stereotypes of the Mature Worker**

There are a variety of stereotypes applied to the mature worker. These can include being grumpy, bitter, inflexible, costlier to train, less engaged, unwilling to learn new skills, unable to change, etc. (Cregan et al., 2016; Dijkers, Kooij, Jansen, & Lange, 2008). Stereotypes of mature workers threaten employees' ability to achieve high levels of performance because they are often treated differently due to the stereotypes. A stereotype threat is when someone, to whom a stereotype applies, is concerned about confirming the stereotype and therefore experiences increased stress (Woolfolk, 2013.) According to the study by Cregan et al., (2016) stereotyping threatens the level of engagement in the mature worker. The study included a survey of 2,664 workers in Australia aged 45 to 75 across a variety of industries. Participants completed a

survey that consisted of 16 questions using a Likert scale response. When the organization's leadership uses a stereotype threat framework, the study confirmed the hypothesis that when mature workers were stereotyped their job engagement was lower within 11 to 12 months. Furthermore, the study found that those mature workers who exhibited the lowest level of engagement had two things in common: a young manager and a lack of support geared toward the mature worker (Cregan et al., 2016). Based on these factors, it is important to provide training for management to prevent stereotyping and provide support to the mature worker.

While this stereotyping has been detrimental to the job engagement of the mature workers, overall, they are the segment of the workforce that are the most engaged and have the highest level of motivation (AARP, 2015). According to the 2015 AARP report, the average engagement level of workers ages 55 and up was 65% compared to a 60% average in all workers in the US. In addition, the average motivation level of this same group of workers was 81% compared to the average of all workers of 78% (AARP, 2015). Given the increased motivation and engagement levels of mature employees, providing mature workers with continued opportunities to development would be beneficial not only to the organization, but also to the employee.

Another area of interest regarding the stereotype of mature workers is the self-perception from the mature worker themselves. When a mature worker views themselves as being "old," it will negatively impact their motivation to continue working (Dijkers et al., 2008). When this self-perception is combined with the perception of a supervisor that mature workers are less valuable, the motivation levels will almost certainly decrease. The self-perpetuating view of being less valuable than younger counterparts can also prevent mature age employees from participating in training and development (Armstrong-Stassen, 2008). Limited training and

development and a lack of feedback from their immediate supervisor can confirm their self-perception creating a cycle of lower motivation and lower engagement levels (Dikkers et al., 2008). Considering that mature employees have been shown to be the most motivated and have the highest level of engagement, supervisors need to be careful to not stereotype their mature workers so that the high levels of engagement and performance that is typically seen in mature workers will continue.

Although stereotypes of mature workers exist, there are tactics used by this segment of the workforce population to try to combat these preconceived notions. According to Paullin (2014), the four tactics used by mature workers include invigoration, internal attributions, identify bifurcation, and assimilation. These are natural reactions to stereotypes. Invigoration is when an employee overcompensates for a specific stereotype (Paullin, 2014). For example, if the stereotype they see as prevalent is less physically capable, they may work harder to prove this is not the case. Internal attributions refer to when a person blames themselves for the short coming, rather than attributing it to the correct issue of stereotyping (Paullin, 2014). Identify bifurcation and assimilation refer to changing their appearance or falsifying their employment records to give the notion that they do not fall within the mature stereotype (Paullin, 2014).

### **Engagement of the Mature Worker**

Engaging employees in their work not only ensures they are happy and productive but also increases their loyalty and retention with the organization. When employers can provide programs, for training and development, specifically geared toward the mature worker the likelihood that they will retain this valuable segment of the workforce population increases (AARP, 2015). Engagement of the mature worker includes recruiting, retention, and ongoing training and development geared towards this specific demographic.

**Recruitment and retention.** The clear majority of companies do not have a program in place for recruiting and retaining mature workers (Armstrong-Stassen, 2008). In a survey of United States employers, only 3% of companies had a specific program for recruitment and only 4% had a program for the retention of mature workers (Gurchiek, 2015). Historically, companies have been more inclined to research the reasons for mature workers leaving the workforce, than to research methods to retain mature workers (Kulik et al., 2016). In addition to this type of research companies have been more inclined to encourage retirement rather than to encourage continued training and development (Armstrong-Stassen, 2008). Organizations have offered benefits such as early retirement incentives and retirement planning. Due to the projected decrease in the percentage of young people in the workforce, coupled with the projected increase in the percentage of mature workers, the recruitment and retention of mature workers will be pivotal to the ability of companies to fill vacancies.

When a company decides to recruit the mature segment of the workforce, they will need to set goals for doing so. Paullin (2014) suggests tactics for recruiting mature workers. Including mature workers in their hiring media will give mature workers the impression that they are welcome in the organization. Another tactic that can prove useful is identifying specific sources where the mature worker might frequent. In addition to these sources, seeking out recently retired employees can open a pool of talent that may be interested in continuing to work (Paullin, 2014). Once mature employees have been recruited, it is then up to the organization to ensure they are provided with the training and development to retain their employment.

According to Paullin (2014) there are a variety of strategies that can be used to retain mature employees. Flexible schedules including telecommuting can offer employees the ability to attend appointments or other events when necessary. Providing part time positions or reduced

hours is another way to incentivize the mature worker to engage in the workforce (Boockmann, Fries, & Göbel, 2012; Paullin, 2014). As mature workers age, their motivation for more leisure activities increases (Dijkers et al., 2008). In addition to this, often the mature employee becomes a caretaker for other family members (Paullin, 2014). Due to this, offering a flexible schedule or part time position would be advantageous for both the employee and employer hoping to retain this demographic of workers.

Another tactic to encourage the retention of the mature worker that has proved fruitful is using mixed teams. This means combining mature workers with younger age workers. This offers the mature worker the opportunity to share their knowledge and the younger workers to support the skill development of the mature worker. A study performed by Boockmann et al., (2012) explored whether specific measures for mature employees were related to longer lengths of employment in Germany. The researchers used 1,063 German companies that employed at least five employees age 40-65 and a total of 241,042 employees. They estimated job exit rates based on longitudinal employer-employee data combining employee registration data and company survey data. Based on their findings, using a mixed team method, including both mature and younger employees, had lower exit rates than those companies that did not employ this tactic (Boockmann et al., 2012).

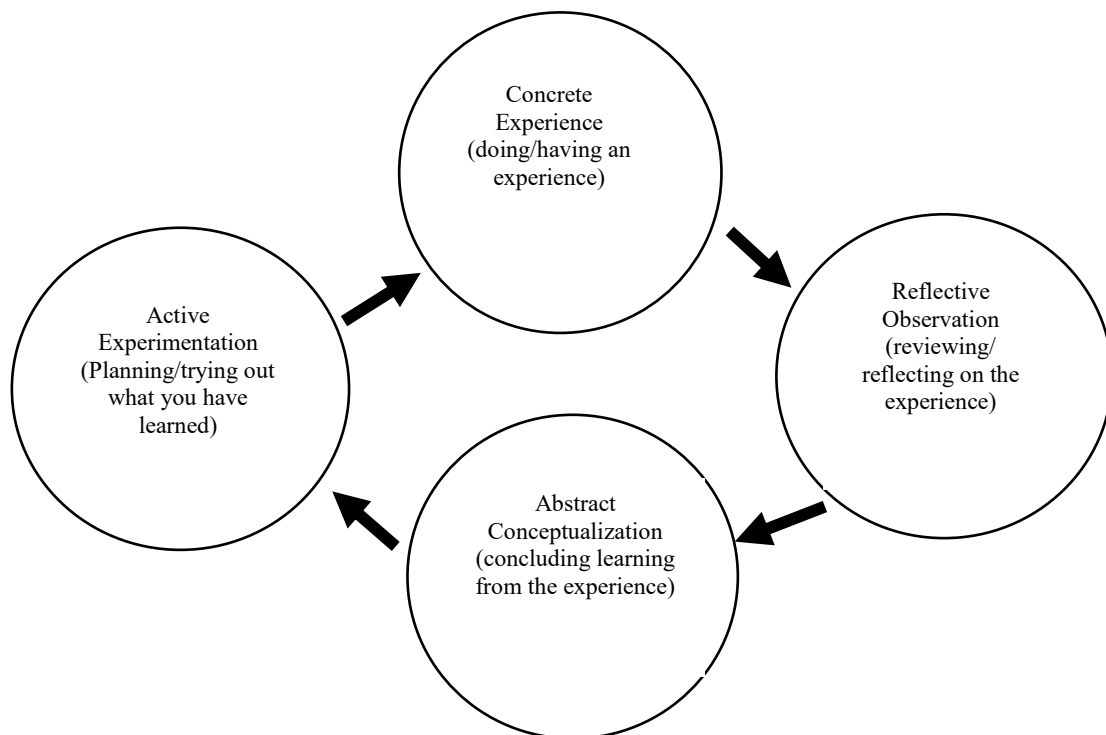
As previously discussed, stereotypes of mature workers can be detrimental to the employee's motivation and engagement. According to Paullin (2014), one way to approach this issue is to provide training for the managers or supervisors of the mature worker. If the supervisor or manager of the mature worker sees the mature worker as less motivated and engaged, they will likely lower their standards and expectations for those employees. This can lead other employees to believe that the mature worker is less valuable (Paullin, 2014). There

are different types of training that companies can provide for their supervisors and managers. The supervisors and managers can be provided with the data that mature workers are not less valuable and that for the most part, age does not affect productivity. The supervisors and managers can also be trained on how to have respectful and meaningful conversations with mature employees (Paullin, 2014). A lack of respect, from coworkers or supervisors, has been a determining factor in employee disengagement (Armstrong-Stassen, 2008). In addition to this, the ability of the supervisor or manager to offer flexible work arrangements is a way to demonstrate their understanding for the unique situations and needs of the mature worker.

### **Training for the Mature Worker**

The ways in which adults learn are often different from the ways that adolescents or children learn (Rothwell, 2008). Adults bring with them a myriad of experiences and knowledge from other sources that affect what they need to know. Adults generally learn best when provided with a variety of teaching methods including experiential learning, practice, and on the job training (Rothwell, 2008). There are a number of factors as to why an adult learner may not transfer what they learn back to their job. Two of those factors include short-term memory loss and supervisors who do not attend the same training (Rothwell, 2008). One way to mitigate the short-term memory loss, is to have the training setting mirror the setting of the job. When the training environment closely resembles the environment of the job, the transference of learning will improve. Supervisors need to be aware of the exact context of the training, so they are able to reinforce the practices that were taught (Rothwell, 2008). Other tactics that can be used to increase the rate of learning transfer include providing memorable training with interesting stories or activities, relating training to what trainees already know and identifying potential on-the-job problems, and appealing to multiple senses or learning styles (Rothwell, 2008).

In 1984, Kolb, (Figure 1) introduced his experiential learning cycle which consists of four stages: concrete experience, reflective observation, abstract conceptualism, and active experimentation. In order to master something new, a person would need to go through all four stages in the cycle. Each stage in the cycle reinforces information learned during training. The cycle begins by having a participant engage in the activity that was trained. The trainees will then reflect on the experience and consider how they performed. After reflecting on their experience, they could participate in a discussion with others who participated or with the instruction, on their performance. Finally, they would use what they discussed and learned to develop a plan for the next time they perform the task. This cycle can repeat itself until a person masters the training task.



*Figure 1.* Kolb's experiential learning cycle. (Kolb, 1984)

In addition to this learning cycle, Kolb presented four learning styles that are common in adults. Knowing what type of learning style someone has is important to provide them with the

most effective training. The learning styles, as shown in Table 2, include diverging, assimilating, converging, and accommodating (Kolb, 1981). Each style has differing variables and methods of preferred learning.

Table 2

*Kolb's Learning Styles (Kolb, 1981)*

Learning Style	Variables	Common Characteristics
Diverging	Watching & Feeling	Prefer to watch rather than do, work in groups, brainstorming
Assimilating	Watching & Thinking	Interested in ideas and concepts, attracted to logically sound theories, prefer readings and lectures
Converging	Doing & Thinking	Prefer technical tasks and problems, like to experiment with new ideas and simulate
Accommodating	Doing & Feeling	Hands on, act on gut instinct, most prevalent learning style

Each of the learning styles (Table 2) pairs with a cycle of the Experiential Learning Cycle (Figure 1). When combined (Figure 2) during a training session, it creates a holistic approach to learning. This ensures that each person's learning style is covered, and the learning is reinforced (Kolb, 1984). Someone who has a diverging learning style benefits from both the concrete experience and reflective observation by feeling during the concrete experience and watching during the reflective observation (Kolb, 1984). While another participant who has an assimilating learning style benefits from reflective observation and abstract conceptualism by

watching during reflective observation and thinking during abstract conceptualism (Kolb, 1984). A participant who has a converging learning style benefits from abstract conceptualization and active experimentation by thinking and doing. An accommodating learning style benefits from feeling during the concrete experience and doing during active experimentation (Kolb, 1984). Using this format for training, multiple environments or activities can be used to keep participants engaged.

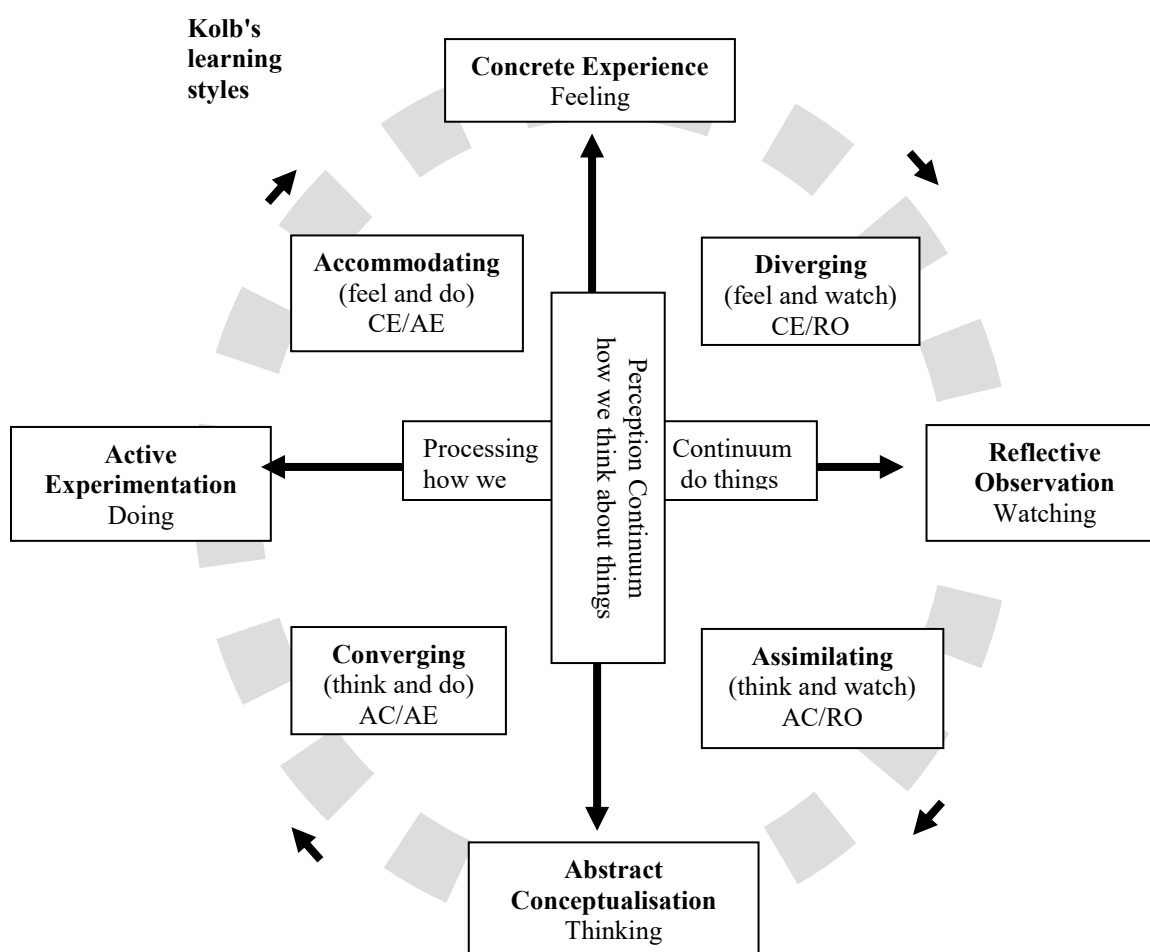


Figure 2. Kolb Learning Style and Cycle. (Kolb, 1984)

There are multiple types of training that organizations use to assist with transferring knowledge to an employee using different learning styles. Depending on the topic being

delivered, E-learning can be utilized to accommodate all of the learning styles (Truong, 2016). It can be used to show how an action is performed, allow participants to practice, and allow them to reflect on their performance. Role playing can also be used to reinforce a diverging learning style by engaging trainees in practicing as well as allowing a trainee to watch others practice what was trained (Kolb, 1984). After a role-playing session, participants can use discussion to reflect on the performance, whether it is their own, or other participants which could be converging or assimilating (Kolb, 1984). Similarly, on-the-job training and shadowing can be used in tandem to allow participants to view how another employee performs a job and reflect on what they have learned which would cover both converging and assimilating learning styles (Kolb, 1984). With on-the-job training, trainees may be able to try to perform the task after watching another employee and can use what they have reflected upon to improve their performance which would appeal to the assimilating learning style (Kolb, 1984). Shadowing generally only allows a trainee to watch and think, rather than actually do the task which would appeal to the converging learning style (Kolb, 1984).

While employers may value training and development for the younger employees, mature employees are often left out of skills training and passed up for promotions or developmental training under the assumption that they are unable or unwilling to learn new skills (Dijkers et al., 2008). This could lead companies to assume that it would be a waste of time and resources to invest in training mature employees, leading to decreased motivation and possibly early retirement or the severing of employment (Desmette & Gaillard, 2008). Providing ongoing job specific training or skills training for mature employees proves to be a good method to ensure engagement in a job. Organizations can offer skills training for technology or other aspects of jobs which may be difficult for mature workers to keep up with. According to Paullin (2014),

companies like Perkins Cole, LLP and the U.S. Fish and Wildlife Service offer online E-learning programs to provide employees with skills related training. Another tactic that can be employed for improving skills in the mature worker is called reverse mentoring. This means that a younger employee with the needed skills mentors the mature worker to assist them in getting up to speed (Paullin, 2014). These types of ongoing, mature worker specific training and development tactics are integral to ensuring workers continue to remain engaged and motivated.

### **Conclusion**

Given the information regarding the motivation and engagement of the mature age workforce as well as the need in the future for this increasing demographic, to be successful, companies must learn to work with this group. The growing need for talent will not be alleviated by the upcoming generation. Organizations will need to put practices in place to support and encourage training and development of the mature workers.

### **Chapter III: Methodology**

Given the increase of mature workers remaining in the workforce and the stagnant growth of younger workers coming into the workforce, Company XYZ should take advantage of the mature workers employed with the organization. They are not taking advantage of the knowledge and skills these mature workers bring to the table and are not providing training and development specific to this demographic.

#### **Subject Selection and Description**

The participants surveyed in this study were employees, both current and recently retired, from a variety of hourly roles in the sales department of an industrial supply organization located in the Midwest. There was a mix of males and females aged 55 and older.

#### **Instrumentation**

A survey was developed (Appendix A and Appendix B) to collect information on the demographics of the participants including their age range and gender. In addition to this information, the length of time the person was or currently is employed with the company was requested as well as if the person is currently working for the company or is retired. From there, the survey gathered information on the individual motivation for continuing to work as well as how the person felt about the support or any accommodations the company provides for them as they near or neared retirement. Another focus of the survey was to determine whether the employees felt that, as mature employees, they were offered specific training and development opportunities. Finally, the survey sought to understand if the employee recognized a perception within the company that mature workers perform at a lower level than younger employees.

**Data Collection Procedures**

The participants of the survey were provided with an implied consent form via Qualtrics to review along with the surveys that were completed. Within one week of distribution, follow up emails were sent to all participants to encourage participation.

**Data Analysis**

Using the results from the survey, frequencies and themes were identified to determine the level of engagement within the mature employee demographic in the organization. In addition to the level of engagement, the results were used to determine satisfaction as it relates to training and development specific to the mature worker demographic.

**Limitations**

Access to the retired employees was limited to contact through other current or retired employees. Due to this, the number of retired participants was significantly lower than the number of currently employed participants.

**Summary**

With the limitation of the number of responses, some generalizations were made with a less than optimal amount data. Regardless of this, the responses that were provided, gave valuable information to develop recommendations.

## **Chapter IV: Results**

As employees stay in the workforce longer and the population of mature workers increases, companies will benefit from offering training and development specific this population segment. This study was designed determine if mature employees, both retired and currently employed, at Company XYZ were engaged and how satisfied they were with the current training and development opportunities. This chapter reviews the demographic and item analysis relating to the study.

### **Demographics**

The employees surveyed were those aged 55 and older who were either currently employed or had retired within the last two years. The estimated population of eligible participants was 150 employees. There were 14 responses received for an approximate 10% response rate.

Of the responses, 12 were from those currently employed and two were from retirees. The majority, 79%, of the respondents were female. The length of employment varied among the respondents, but nine of the respondents have or had been employed with the organization for more than 20 years. Of the respondents who are currently employed, seven have determined their retirement age with the ages varying between 60 and 70 years.

### **Item Analysis**

The information collected from the surveys, 14 responses, was qualitatively analyzed and was grouped into positive, neutral, and negative responses. Positive responses included strongly agree, agree, extremely strong, strong, describes me extremely well, and describes me well. Neutral responses included neither agree or disagree, average, and describes me moderately well. Negative responses included disagree, strongly disagree, weak, extremely weak, describes me

slightly well, and does not describe me. There were also a number of questions which participants chose not to respond to. Table 3 highlights the majority of the questions from the survey.

Overall, the employees who responded to the survey answered positively regarding the training currently offered for their age as well as their personal motivation as they near or neared retirement. Regarding their engagement, the responses were either positive (7) or neutral (4), with no negative responses. In contrast, the responses regarding feeling valued at work, were more spread out with only four feeling positive. Another interesting contrast is the difference between the response of “the company shows they care about employees my age” and the response to “I feel valued at work.” More than double the people responded that the company shows that they care. The responses for the statement “I feel valued at work” is much more spread out with only four responses in the positive, two neutral, and three negative. Also, while employees continue to be engaged in their work, they are not necessarily motivated to develop in their role as they neared retirement. Table 3 includes these responses from the survey.

Table 3

*Survey Questions*

Question	Positive	Neutral	Negative	No Response
The company provides sufficient training specific to employees my age	9 – 65%	1 – 7%	2 – 14%	2 – 14%
The company shows that they care about employees my age.	9 – 65%	0 – 0%	3 – 21%	2 – 14%
My immediate supervisor takes an interest in my training and development.	8 – 58%	1 – 7%	3 – 21%	2 – 14%
My personal motivation to continue to develop in my role as I near(ed) retirement is(was):	8 – 58%	2 – 14%	2 – 14%	2 – 14%
My current level of engagement is/As I neared retirement, my level of engagement was:	7 – 50%	4 – 29%	0 – 0%	3 – 21%
The statement “I feel valued at work”:	4 – 29%	2 – 14%	3 – 21%	3 – 21%

The question that stands out among all of the others is “within the organization, there is a perception that workers my age do not learn to use technology at the same rate as younger workers” (Table 4). The majority, 71.4% believe that there is a perception that they do not learn to use technology at the same rate. When compared with the response of “I feel valued at work” (28.6% positive) it is apparent that though the employees consider the company to offer training specific to them and that the company cares about them, there is a disparity with their motivation and engagement. They may internally feel positive about their abilities, but do not feel the same regarding others’ perceptions and feelings about them.

Table 4

*Within the Organization, there is a Perception that Workers My Age Do Not Learn to Use Technology at the Same Rate as Younger Workers*

Response	Frequency	Percentage
Disagree	1	7%
Neutral	0	0%
Agree	10	71%
No Response	3	21%

The employees who responded have been offered a variety of benefits as they near retirement. Table 5 shows the responses regarding the benefits. The benefits employees were most offered as they neared retirement were time off for appointments (6) followed by work from home (5). The work from home option has recently been rolled out to the entire company for positions that qualify, which is largely attributed to this number. The positions that qualify are those in the office and not in the warehouse. There are a number of benefits that these respondents would like to see more of. The employees identified flexible hours (6) and part-time (4) as two options they would like to see more of. These two options have been discussed within the organization lately but are not yet available. The company runs a tight operation and has not developed a way to offer this benefit. The ability to transfer to a department of their choice was also frequently identified (5) but is not an option that is currently exercised with regularity within the company.

Table 5

*Company Benefits*

Response	Flexible Hours	Part Time	Skills Training	Time off for Appointments	Transfer to Department (No Choice)	Transfer to Department (with Choice)	Work from Home
Offered nearing retirement	2 – 14%	1 – 7%	2 – 14%	6 – 43%	1 – 7%	0 – 0%	5 – 36%
Would like to see more of	6 – 43%	4 – 29%	4 – 29%	1 – 7%	0 – 0%	5 – 36%	1 – 7%

While skills training was not identified by a large number of responses (4) as a benefit they would like to see, a number of technical training options were selected by respondents that they feel would be beneficial. These options are identified in Table 6. All of the options identified have some technology aspect to them. It is no surprise considering that 71.4% believe that there is a perception that they do not learn to use technology at the same rate as younger employees. Learning Microsoft Outlook was identified by the respondents five times as training that would be beneficial to them. This is likely due to the fact that the majority of communication among the departments is sent via email. The second most identified topic is Workstation training. This is the program that is used in every department to process orders, identify customers, and locate information on the items sold by Company XYZ. The company continues to add more functionality to this program, and the changes are becoming more frequent and more technologically advanced. As the changes happen, it becomes more difficult to stay ahead of the changes. More training on this program would help employees to do their jobs more effectively.

Table 6

*Which of the Following Training Would be Beneficial to You?*

Response	Frequency	Percentage
Microsoft Outlook	5	36%
Text Contact Center	2	14%
Intranet	2	14%
Workstation	3	21%
Website Searching	2	14%
Product Information	2	14%
Slack	1	7%
Microsoft Excel	1	7%

### **Summary**

The responses from the surveys provided a range of opinions of the existing training for mature employees and the level of engagement of those employees as they near retirement.

While there were positive responses, there are also areas of training that would be beneficial to those employees.

## **Chapter V: Discussion, Conclusion and Recommendation**

The purpose of this study was to determine if the mature workers, both employed and retired, at Company XYZ are engaged and if the existing training and development is satisfactory to them. This chapter reviews the conclusions and recommendations relating to the study.

### **Discussion**

The quantity of survey responses was lower than expected which was likely due to a number of reasons. The number of employees that fell under the demographic of the study, employees age 55 and older currently employed or retired within the past two years, numbered approximately 150. With a response rate of approximately 10%, further research was done to determine why this rate was lower than expected.

Company XYZ has a history and culture of being exceedingly private about its information. The organization is privately held and is not as transparent in the ways typical of similar organizations. They do not boast about their profit and loss statement and do not post sales figures. In addition, they do not have an organization chart that is published to employees or even offer a standard career path that other organizations might suggest. In recent times, with the advent of social media and the need to recruit a new type of employee, the organization has become more transparent and forthright; however, the culture that the majority of this demographic experienced was that of privacy. Due to this cultural norm, it is likely that the employees who received the survey felt that they would be breaking the unspoken rules of the culture that they had been a part of for the majority of their careers, if they were to participate.

Another factor that may have contributed to the low response rate is that the retired employees have less interest in this topic as it no longer applies to them. The currently employed

response rate was significantly higher than that of the retired employees. The employees who are currently employed would benefit from a change to the existing process while those who are retired would not see any results in their current lives from it.

## **Conclusions**

The literature review demonstrated the importance of the mature worker demographic in the workforce going forward, as well as the importance of their engagement and continued training. The results from the data collected showed a wide range of opinions on the existing training and development as well as the levels of engagement of the mature workers. Based upon this information, the following is recommended for the organization to maximize the mature worker for their future growth.

## **Recommendations**

The mature workers within the Company XYZ have varied backgrounds and opinions on the need for additional training and development when they are nearing retirement. Their personal motivation and engagement was spread across the responses as well. With this information, the recommendation is for the organization to develop individual development plans (IDP) for those employees who are interested. The individual development plan should focus on short and long-term goals as well as development objectives and activities for the individual to focus on. Development of the IDP would be ongoing and continue until the employee retires. There are four steps involved that are recommended to accomplish this successfully.

**Recruit for IDP.** The individual development plans should not be mandatory for workers. The organization should establish a recruiting strategy for encouraging mature employees to prepare an IDP.

**Train supervisors to develop the IDP.** Supervisors need to be well versed in the IDP document (Appendix C) and understand the importance of developing the IDP with the employee. As noted in the literature review, supervisor involvement is crucial to the engagement of employees within an organization, particularly once they reach mature status. Supervisors should guide the employee by ensuring that the goals and activities align with the focus of the company and its goals and strategies.

**Employee and supervisor develop IDP.** The supervisor and employee should work together to develop the IDP for the individual. By encouraging active involvement from the employee, the employee can take ownership of their development, rather than being assigned training and development activities by management. A meeting time should be arranged in advance in order to provide time for the employee and supervisor to prepare for the meeting. Prior to meeting, each should brainstorm strengths and areas for improvement for the employee.

The employee should be the primary contributor to developing the IDP, and the supervisor would be there to facilitate the process as well as answer any questions the employee may have. One way they can do this is to ensure the employee is using SMART goals. The goals should be specific, measurable, attainable, realistic, and time bound. In addition, if the employee needs more assistance, the supervisor should ask open ended questions to help the employee develop their goals. Finally, the supervisor should assist in facilitating any training and development activities that the employee indicates on their IDP. They would be responsible for arranging the training or providing the tools for the employee to complete an activity they have identified on their IDP.

**Continued support.** After the IDP has been written by the employee and supervisor, the next meeting date should be scheduled. This will ensure the IDP goals are follow up on and that the process will continue.

## References

- AARP. (2015). *A business case for workers 50+: A look at the value of experience*. Retrieved from <http://states.aarp.org/wp-content/uploads/2015/08/A-Business-Case-for-Older-Workers-Age-50-A-Look-at-the-Value-of-Experience.pdf>
- Armstrong-Stassen, M. (2008). Human resource practices for mature workers – And why aren't employers using them? *Asia Pacific Journal of Human Resources*, *46*, 334-352. doi: 10.1177/1038411108091755
- Boockmann, B., Fries, J., & Göbel, C. (2012). Specific measures for older employees and late career employment. *IAW Discussion Papers*. Retrieved from <http://ftp.zew.de/pub/zew-docs/dp/dp12059.pdf>
- Bureau of Labor Statistics. (2015). *Employment predictions – 2014-2024*. Retrieved from <https://stats.bls.gov/news.release/pdf/ecopro.pdf>
- Cregan, C., Kulik, T., & Perera, S. (2016). Engage me: The mature-age worker and stereotype threat. *Academy of Management Journal*, *59*, 2132-2156. doi:10.5465/amj.2015.0564
- Desmette, D., & Gaillard, M. (2008) When a “worker” becomes an “older worker”. *Career Development International*, *13*(2), 168-185. doi:10.1108/13620430810860567
- Dijkers, J., Kooij, D., Jansen, P., & Lange, A. (2008). Older workers' motivation to continue to work: Five meanings of age. *Journal of Managerial Psychology*, *23*, 364-394. doi: 10.1108/02683940810869015
- Gurchiek, K. (2015). Survey: Many organizations unprepared for aging workforce. *Society for Human Resource Management*. Retrieved from <https://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/hr-aging-workforce.aspx>

- Kolb, D. (1981). Learning styles and disciplinary differences. In A.W. Chickering (Ed.), *The modern American college: Responding to the new realities of diverse students and a changing society* (pp. 232-255). San Francisco, CA: The Modern American College.
- Kolb, D. (1984). *Experiential learning: Experience as the source of learning and development* (Vol. 1). Englewood Cliffs, NJ: Prentice-Hall.
- Paullin, C. (2014). The aging workforce: Leveraging the talents of mature employees. *Society for Human Resource Management*. Retrieved from <https://www.shrm.org/ResourcesAndTools/hr-topics/talent-acquisition/Documents/Aging%20Workforce%20EPG-FINAL.pdf>
- Rothwell, W. (2008). *Adult learning basics*. Danvers, MA: American Society for Training & Development.
- Truong, H.M. (2016). Integrating learning styles and adaptive e-learning system: Current developments, problems and opportunities. *Computers in Human Behavior*. 55(B), 1185-1193. doi:10.1016/j.chb.2015.02.014
- Woolfolk, A. (2013). *Educational psychology* (12<sup>th</sup> ed.). Upper Saddle, NJ: Pearson Education, Inc.

## Appendix A: Currently Employed Survey

Age (Select One)

- 55-59
- 60-64
- 65-69
- 70-74
- 75+

Gender: \_\_\_ Male    \_\_\_ Female    \_\_\_ Other    \_\_\_ Prefer not to answer

Years Employed with Company (Select one)

- 1-9
- 10-14
- 15-19
- 20-24
- 25-29
- 30-34
- 35-39
- 40+

Do you have a planned retirement age? \_\_\_ Yes    \_\_\_ No

If yes, at what age do you plan to retire? \_\_\_\_\_

1. The company provides sufficient training specific to employees my age.  
Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree
2. The company shows that they care about employees my age.  
Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree
3. My immediate supervisor takes an interest in my training and development.  
Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree
4. My personal motivation to continue to develop in my role as I near retirement is:  
  
Extremely Strong    Strong    Average    Weak    Very weak
5. Which of the following has been offered to you as you near retirement? (check all that apply)
  - Flexible Hours                       Part Time                       Work From Home
  - Skills Training                       Time off for appointments
  - Transfer to Department with no choice                       Transfer to Department of Choice
  - Other \_\_\_\_\_

6. Which of the following would you like to see more of?
- Flexible Hours                       Part Time                       Work From Home
- Skills Training                       Time off for appointments
- Transfer to Department with no choice                       Transfer to Department of Choice
- Other \_\_\_\_\_

7. Within the organization, there is a perception that workers my age do not learn and use technology at the same rate as younger workers.

Strongly Agree    Agree                      Neutral                      Disagree                      Strongly Disagree

8. Which of the following training would be beneficial to you?
- Microsoft Outlook                       Website Searching                       Workstation Training
- Text Contact Center                       Product Information                       Intranet
- Other \_\_\_\_\_

9. My current level of engagement is:

Far Above Average    Somewhat Above Average    Average

Somewhat Below Average    Far Below Average

10. The statement "I feel valued at work":

Describes me extremely well                      Describes me very well

Describes me moderately well                      Describes me slightly well    Does not describe me

11. Is there anything you would like to share about continuing developmental opportunities?

## Appendix B: Retired Employee Survey

Age (Select One)

- 55-59
- 60-64
- 65-69
- 70-74
- 75+

Gender: \_\_\_ Male    \_\_\_ Female    \_\_\_ Other    \_\_\_ Prefer not to answer

Years Employed with Company (Select one)

- 1-9
- 10-14
- 15-19
- 20-24
- 25-29
- 30-34
- 35-39
- 40+

At what age did you retire? \_\_\_\_\_

1. The company provided sufficient training specific to employees my age.  
Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree
2. The company showed that they care about employees my age.  
Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree
3. My immediate supervisor took an interest in my training and development.  
Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree
4. My personal motivation to continue to develop in my role as I neared retirement was:  
  
5. Extremely Strong    Strong    Average    Weak    Very weak
6. Which of the following was offered to you as you neared retirement? (check all that apply)
  - Flexible Hours                       Part Time                       Work From Home
  - Skills Training                       Time off for appointments
  - Transfer to Department with no choice                       Transfer to Department of Choice
  - Other \_\_\_\_\_

7. Which of the following would you have liked to see more of?
- Flexible Hours
  - Part Time
  - Work From Home
  - Skills Training
  - Time off for appointments
  - Transfer to Department with no choice
  - Transfer to Department of Choice
  - Other \_\_\_\_\_
8. Within the organization, there was a perception that workers my age do not learn and use new technology at the same rate as younger workers.
- Strongly Agree      Agree      Neutral      Disagree      Strongly Disagree
9. As I neared retirement, my level of engagement was:
- Far Above Average    Somewhat Above Average    Average
- Somewhat Below Average    Far Below Average
10. Is there anything you would like to share about continuing developmental opportunities?

### Appendix C: Individual Development Plan

#### Individual Development Plan

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

<b>Short-Term Career Goal</b> (1 year or less)	<b>Long-Term Career Goal</b> (More than 1 year)

<b>Strengths</b> (What am I good at?)	<b>Opportunities</b> (What could I do better?)

<b>Training and Development Objective</b>	
<b>Follow Up Date:</b>	

<b>Training and Development Activity</b>	
<b>Follow Up Date:</b>	

**Next Meeting Date:** \_\_\_\_\_