

STAFFING MANAGEMENT
SYLLABUS, VIDEO REFERENCES AND INSTRUCTOR READINGS

Workforce Planning: Aging and Employment

By Barbara McIntosh, Ph.D., SPHR



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Workforce Planning: Aging And Employment

NOTE TO INSTRUCTORS

The following materials include:

- » Prerequisites.
- » Course description.
- » Learning objectives.
- » Required texts.
- » Grading components.
- » Schedule with assigned readings (based on a 13- or 14-week semester).
- » Video and audio list.
- » Additional instructor suggestions and readings.

PREREQUISITES

Basic statistics, introduction to management/organization behavior, human resource management; microeconomics is also useful.

COURSE DESCRIPTION

Shifting demographics, the changing nature of work and the emerging platforms to achieve productivity, including technology and workplace flexibility, are increasing the need for strategic human resource (HR) management and planning. Understanding the issues related to an aging workforce is central in this planning process. Economic conditions, uncertainty in the labor market, and intergenerational dynamics are changing both employer and employee expectations about the role of work, and the impact of these volatile forces on employment remains uncertain. The issues are particularly complex because of the regulatory and legal environment, productivity demands, and established HR policies and practices. This course examines labor market dynamics, labor force participation patterns, evolving employer policies and practices, and changing employee expectations. Particular emphasis is placed on current best practices and emerging trends regarding older workers.

LEARNING OBJECTIVES

At the end of this course students will be able to:

- Appreciate the dynamics and implications of changing workforce demographics.

- Understand the implications of current economic conditions for future HR planning.
- Discuss the employment dynamics facing older workers and employers.
- Identify the HR issues confronting employers regarding the multigenerational workforce, knowledge transfer and emerging career management challenges.
- Identify alternative approaches to traditional work practices, including hours of work, location and technological interfaces.
- Understand the issues above in the context of the broader global environment.

REQUIRED TEXTS

Czaja, S., & Sharit, J. (Eds.) (2009). *Aging and work*. Baltimore, MD: The Johns Hopkins University Press.

Schultz, K., & Adams, G. (2009). *Aging and work in the 21st century*. New York: Psychology Press.

GRADING COMPONENTS

- | | |
|-----------------------------|-----|
| ■ Two essay exams (25% x 2) | 50% |
| ■ Team case I | 15% |
| ■ Team case I presentation | 5% |
| ■ Case II | 20% |
| ■ Participation | 10% |

SCHEDULE

WEEK	MODULE TOPIC	READINGS: AUTHOR/CHAPTER CS: Czaja & Sharit; SA: Schultz & Adams
BACKGROUND		
1	Module 1: Overview <ul style="list-style-type: none"> ▪ What does aging mean in today's society? ▪ Demographics ▪ Productive activity 	CS 1
2	Module 2: Age Stereotyping, Age Discrimination and the Legal Environment <ul style="list-style-type: none"> ▪ Stereotypes ▪ Age discrimination issues ▪ Existing protections and court interpretations 	SA 5 SA 4
3	Module 3: Labor Markets <ul style="list-style-type: none"> ▪ Labor markets: Economic theory and economic reality ▪ Labor force participation rates (LFPR) and age ▪ Labor markets: Race and gender considerations ▪ Changing nature of work ▪ Employment alternatives and productive activity 	SA 2
EMPLOYMENT		
4	Module 4: Employee Perspective: An Overview <ul style="list-style-type: none"> ▪ Changing individual expectations <ul style="list-style-type: none"> » Why work? » Costs and benefits of work » Alternative choices ▪ Changing career patterns and the next stage ▪ Changing work environment 	SA 7 SA 12
5	Module 5: Employer Perspective: An Overview <ul style="list-style-type: none"> ▪ Strategy and sustainability ▪ The business case for older workers ▪ Cost/benefit assessment ▪ Strategy implications for HR 	CS 5 CS 6 CS 10
6	Module 6: Staffing/Job Search Issues <ul style="list-style-type: none"> ▪ Profiling and forecasting ▪ Internal labor supply tactics ▪ Recruitment ▪ Selection <p>EXAM 1 DUE IN CLASS</p>	
Continued on following page		

WEEK	MODULE TOPIC	READINGS: AUTHOR/CHAPTER CS: Czaja & Sharit; SA: Schultz & Adams
7	Module 7: Motivation and Performance <ul style="list-style-type: none"> ▪ Performance assessment ▪ Multigenerational issues ▪ Productivity: Training and development 	SA 6 p. 150-155 SA 8-9 CS 8 CS 11-14
8	Module 8: Productivity: Health, Ability and Employee Relations <ul style="list-style-type: none"> ▪ Productivity: Ability and health ▪ Ergonomics and accommodations ▪ Safety and health issues 	SA 10 CS 15-18
9	<i>No Class (Case preparation with team)</i> <i>Case Discussion</i>	
10	Module 9: Managing Careers and Workplace Flexibility <ul style="list-style-type: none"> ▪ Managing organization commitment and career engagement ▪ Managing knowledge transfer ▪ Retention and transitions ▪ Recapturing retirees ▪ Managing hours of work ▪ Flexibility options ▪ Virtual work 	SA 11 CS 7
FINANCIAL ENVIRONMENT		
11	Module 10: Economic Considerations: Incentives and Disincentives to Work <ul style="list-style-type: none"> ▪ Pensions ▪ Savings ▪ Social Security ▪ Health insurance (Medicare/Medicaid) EXAM II DUE IN CLASS	CS 4
12	Module 11: Unemployment and Public Transition Assistance <ul style="list-style-type: none"> ▪ Involuntary unemployment and consequences ▪ Laws providing for older worker training and labor market assistance ▪ Voluntary unemployment: Encore career transitions 	SA 3
GLOBAL ENVIRONMENT		
13	Module 12: International Examples: Pressures and Lessons	CS 3
14	<i>Future Trends</i> FINAL CASE DUE IN CLASS	

VIDEO AND AUDIO LIST

Module 1: Overview

1. Video: *The future of aging: 2014 aging in America. General session of the American Society on Aging (March 14, 2014, San Diego)*

Presenters: Joseph Coughlin, Ph.D., director, AgeLab, Massachusetts Institute of Technology; Ken Dychtwald, Ph.D., president and CEO, Age Wave; Jo Ann Jenkins, vice president and chief operating officer, AARP; Fernando Torres-Gil, Ph.D., professor, UCLA School of Public Affairs

URL: <http://vimeo.com/90718741>

Summary: This video is about an hour long (the speakers talk about 45 minutes) and provides an overview of aging issues.

Module 2: Age Stereotyping, Age Discrimination and the Legal Environment

1. Audio: *Prime Time Radio: Burden of proof in age discrimination cases*

URL: http://www.aarp.org/politics-society/rights/info-05-2010/jack_gross.html

Summary: Jack Gross talks about his age discrimination case that went to the U.S. Supreme Court. This is a long discussion, but it highlights the complexity of legal decisions. The importance of timely filing and the emotional toll on the defendant in an aging discrimination lawsuit are discussed.

2. Video: *Ageism*

URL: <http://www.youtube.com/watch?v=c7iFd93grk8>

Summary: This 8-minute video highlights the stereotypes we have about aging and societal pressures to look young. Ageism in the media is discussed by Doris Roberts and Barbara Walters, and ageism in politics by Ronald Reagan.

Module 4: Employee Perspective

1. Video: *Use it or lose it (from Checkup with Dr. Stork)*

URL: <https://screen.yahoo.com/checkup-with-dr-stork/lose-040000186.html>

Summary: Dr. T Stork talks about body parts and aging. Brains, bones and muscle are “use it or lose it” body parts. Dr. Stork covers what can be done to prevent this loss, including mental activity and exercise.

2. Video about people greeters (July 15, 2013)

URL: <http://jobs.aol.com/articles/2013/07/15/nordstroms-99-year-old-greeter/>

Summary: Store “people greeters” are an endangered species in American retail. Walmart scrapped theirs recently, and the upscale department store Nordstrom has

only one left in the entire country. His name is Ted DiNunzio, and in December he's turning 100. The video is at the bottom of the web page.

3. Video on why older workers choose to work

URL: <http://hosted.ap.org/interactives/2013/aging-america/>

Summary: Three videos highlight perspectives of three individuals. Tom Sadowski, a 65-year-old graphic designer, discusses how his retirement plans changed with the last recession; Oscar Martinez, a 77-year-old chef at Disneyland, talks about loving his work; and Robert Schuffler, a 96-year-old family business owner, talks about keeping busy. Videos can be found on the bottom of the web page.

Module 5: Employer Perspective

1. Video: *Investment in older workers turns a big profit*

URL: <http://www.youtube.com/watch?v=NujnDltykkY>

Summary: The average age of Vita Needle's workers is 74 years old, and that's no accident. The manufacturing company has intentionally hired seniors—a decision that has increased profits and benefited older workers who often have a harder time finding a job. Paul Solman reports on the company's unique model for doing business.

Module 7: Motivation and Performance

1. Video: *Call center training program for 50+*

URL: <http://www.aarp.org/aarp-foundation/our-work/income/back-to-work-50-plus/video-lane-workforce-partnership/>

Summary: This report from KMTR News in Eugene, Ore., profiles a job training program coordinated by the Lane Workforce Partnership for people age 50 and older. The program provides eight weeks of training and is supported by a grant from AARP Foundation.

Module 10: Managing Careers and Workplace Flexibility

1. Video: *Meet the #1 winner of the 2013 AARP Best Employers for Workers Over 50 Award*

URL: http://www.aarp.org/work/employee-benefits/best_employers/

Summary: Find out why NIH tops the winners' list of the 2013 AARP Best Employers for Workers Over 50 Award, co-sponsored by SHRM.

2. Video: *How to find a part-time job*

URL: <http://www.forbes.com/sites/kerryhannon/2013/01/25/why-older-workers-cant-be-ignored/>

Summary: In this brief video, *Forbes* columnist Kerry Hannon discusses part-time work for older workers.

Module 12: Unemployment and Public Transition Assistance

1. Video: *GAO: Excerpts from focus groups and interviews with unemployed older workers, June and July 2011*

URL: <http://www.youtube.com/watch?v=HdZbVKcloYI>

Summary: Many unemployed older workers experience challenges regaining employment and face reduced retirement security. Examples of financial and re-employment challenges that long-term unemployed older workers face include struggling with depression and discouragement, difficulty paying critical living expenses, the perception that employers are reluctant to hire them, and more.

2. Video: *New age discrimination: Unemployed older workers (April 30, 2013)*

URL: <http://www.youtube.com/watch?v=290508q-00U>

Summary: A look at what some believe to be a new form of job discrimination—not hiring long-term unemployed older workers.

3. Video: *Brutal job search reality for older Americans out of work*

URL: http://www.youtube.com/watch?v=MWMzgU_QfHU

Summary: Despite a rosier jobs picture, for Americans ages 55 or older who have been unemployed long term, the prospect of finding work is greatly limited. Economic correspondent Paul Solman explores why older workers face joblessness and considerable financial strain.

Module 13: International Examples: Pressures and Lessons

1. Article: *The aging world (Slate, April 24, 2014)*

URL: http://www.slate.com/articles/news_and_politics/politics/2014/04/aging_populations_where_people_are_getting_older_mapped.html

Summary: This article and the accompanying infographic map out the world's oldest populations based on data from the UN Department of Economic and Social Affairs. The instructor can click on the date and see how the world changes in terms of the percentage of the population over the age of 65. It is also possible to drag the map around to see parts that are not included in the immediate picture. This resource is a great addition to the lecture.

2. Video: *Japan's new way to keep its aging society in work*

URL: <http://www.businessweek.com/videos/2012-08-05/japans-new-way-to-keep-its-aging-society-in-work>

Summary: This video discussed employment of workers over the age of 60 in Japan.

Module 14: Future Trends

1. Video: *The big idea in 4 minutes: Coming of age in aging America*

URL: <http://www.youtube.com/watch?v=ZOA1v4-2Fos>

Summary: What will it mean for us all to grow up, live and age in a society where half the citizens are over the age of 50? Never in human history has this been our reality. And it's not just Americans. Europe, China, Japan—we are an aging globe. It's new and it's not temporary. This is a permanent historic transformation.

INSTRUCTOR SUGGESTIONS

Research Component

Time is taken throughout the 14 modules to discuss research results. The purpose is to expose students to this process so they have a better appreciation of the role research plays in general. Discussing the results of regression analysis should also show students what to look for in empirical studies—e.g., sample size, data collection method, size of the Beta coefficients, R square (explained variance). This material is usually not essential to the lecture, however, and can be eliminated if it is not appropriate for the students in the class.

Case Studies

Rather than administering traditional exams, the cases that accompany the modules can be used to test students' understanding of the material. As shown in the schedule above, they can also be used to direct class discussion.

SUGGESTED INSTRUCTOR READINGS

AARP. (2007). *Leading a multigenerational workforce*. Washington, D.C.: AARP.

Benz, J., Sedensky, M., Tompson, T., & Agiesta, J. (2013). *Working longer: Older Americans' attitudes on work and retirement*. The Associated Press and NORC. Retrieved from [http://www.apnorc.org/PDFs/Working%20Longer/AP-NORC%20Center Working%20Longer%20Report-FINAL.pdf](http://www.apnorc.org/PDFs/Working%20Longer/AP-NORC%20Center%20Working%20Longer%20Report-FINAL.pdf).

Delong, D. (2004). *Lost knowledge*. London: Oxford.

Dychtwald, K., Erickson T.J., & Morison, R. (2006). *Workforce crisis: How to beat the coming shortage of skills and talent*. Boston: Harvard Business School Press.

Hedge, J., & Borman, W. (2012). *The Oxford handbook of work and aging*. New York: Oxford University Press.

MetLife. (2009). *Generations in the workplace: A workbook for engaging the best talent of all ages*. Westport, CT: MetLife Mature Market Institute.

Perron, R. (2011). *Employer experiences and expectations: Finding, training and keeping qualified workers*. Washington, D.C.: AARP Foundation.

Society for Human Resource Management. (2009). The multigenerational workforce: Opportunity for competitive success. *SHRM Research Quarterly*, 1. Retrieved from http://www.shrm.org/research/articles/articles/documents/09-0027_rq_march_2009_final_no%20ad.pdf.

Twenge, J., Campbell, S., Hoffman, B., & Lance, C. (2010). Generational difference in work values: Leisure and extrinsic values increasing, social and intrinsic values decreasing. *Journal of Management*, 36: 1117. DOI: 10.1177/0149206309352246.

An excellent overview of the aging issues covered in this course is provided in the following source:

AARP. (2014, January). *Staying ahead of the curve 2013: The AARP work and career study*. Washington DC: AARP.

The best way to prepare for this course is to keep up with news:

■ *The Current Awareness in Aging Research E-Clippings*

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■ Reports published by the federal government, particularly the Bureau of Labor Statistics and the Department of Labor (*Monthly Labor Review*).

■ Relevant state-level reports.

■ Materials published by the Sloan Center for Aging and Work at Boston College.

■ AARP, SHRM and related organizations.

Some of these documents are listed in the “Notes” section on the first slide in each module.

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<http://shrm.org/about/membership/pages/default.aspx>.



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