

# Preparing the 21<sup>st</sup> Century Organization for the Aging Workforce

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## Abstract

Organizational effectiveness includes investing in training and development of human capital. Preparing the 21<sup>st</sup> century organization for the diverse future workforce demands that organizational leaders address the amassing older population remaining in employment. Despite extensive literature on aging employees, organizations are not prepared to meet the needs of this population. The authors discuss the problem and propose using a framework of learning theories. The future of organizational effectiveness necessitates plans for the aging workforce.

**Keywords:** *Aging, Development Learning, Organizational, Theories, Workforce*

## Introduction

“Silver Tsunami” has become a known term in the healthcare industry to identify the onslaught of aging employees in the workforce [1, 2]. For over a decade, healthcare administrators and scientists have been working to address implications of extended lifespan and the growing aging population [1, 2]. The field of organizational management is deficient and facing a possible workplace crisis in meeting the needs of aging employees [3, 4, 5, 6, 7]. Although behavioral science disciplines and social justice organizations have identified the crucial importance of making necessary changes, the gap in the literature indicates, organizational management lacks empirically based approaches for training and development of older employees [3, 4, 5, 6, 7]. Organizational management needs empirical approaches to training and development that are relevant to the aging workforce population [8].

Inspired by the theoretical development of organizational learning, adult learning theory, and additional theories, insights are offered to the uniqueness of the aging workforce and possibilities for expanding existing management theories with emerging concepts. Within are discussed the contributions of existing learning theories and proposed concepts for new theories to support organizational management. Also discussed is how to expand appropriate training and development to the older workforce, which is empirical and theory-based. Highlights include why it is crucial to fill the research gap and make recommendations for future explorations about new theories and paradigms.

## **The Problem**

Sustainability and viability of an organization is dependent on a performance management plan that aligns with the organizational strategic planning [9, 10, 11, 12]. The technological industry acknowledges that meeting consumer demands necessitates rapid innovations and shorter product cycles [13]. Globalization, rapid technological advancements, and extended life expectancy make it crucial for organizational management to align training and development appropriate to the aging workforce population. Extended lifespan changes the landscape of the workforce and extends the traditional retirement age [14, 4].

Employees are retiring later in life and seeking additional employment after retirement [3, 15, 4, 5, 6, 7]. Older employees report reasons such as, financial needs that necessitate delaying retirement [16, 15]. The literature indicates organizations are not prepared to manage the growing aging population in the workplace [3, 4, 5, 6, 7]

## **Literature Review and Background of the Problem**

According to the U. S Census Bureau [19], individuals 65 years or older in the United States of America are projected to represent 20% or 72 million adults by 2030 [17, 18, 6]. The increase in the qualifying age for social security benefits demands for extended insurance coverage through employers' present challenges for retirees [19, 17, 18]. An increase in the number of older employees seeking full-time employment is evident [15]. A reported 56% of older adults are employed in part-time positions and 44% holding full-time positions [17]. Results from a 2002 *Life Planning Survey* indicated two-thirds of respondents identified as older workers indicated wanting training and leadership development [15]. Professional training and development is a proactive method for combating the challenges of the aging workforce [14, 15].

## **Contending Views**

The literature review for contending views indicates limited literature that directly contrasts the primary argument. Therefore, information regarding contending views is adapted from the literature on succession planning and workforce planning. Although the information on succession planning and workforce planning refers to training and development for aging employees, the aging workforce is only spoken of as a general reference in the literature [20, 21, 22, 23, 24, 25, 26]. The literature on succession planning and workforce planning loosely states that the aging population needs to transfer knowledge before leaving the workforce [21, 27, 25]. Jacobson [23] indicates there is a workforce-planning crisis involving inadequate training and development at the local, state, and federal levels. This crisis about adequately equipping and training the older employees exists, yet has little priority in the literature [23]. Information within this document serves to address the gap in the literature.

## **Significance to I/O Psychology**

Aging employees make up the largest group in the workforce [28]. Employers need to address the challenges of older employees in the workplace [29]. Appropriate training and development of older employees is a necessity and provides employers with an advantage by having experienced workers in the workplace [15, 18, 7]. An estimated 25 million Baby

Boomers are expected to leave the workforce by 2020, resulting in a loss of decades of expert organizational knowledge [30].

Filling the gap will help retain aging employees in the workforce, resulting in a knowledge transfer to younger employees [31, 30, 7]. Organizational loss of expertise from Baby Boomers exiting the workforce will result in increased turnover and significant financial loss to organizations [6]. Baby Boomers will only change jobs four to six times in a lifetime while those of Generation X may change jobs 10 to 12 times, and those in Generation Y change jobs every one to two years [32, 6]. Allen [33] reported the expense of turnover costing organizations 25% to 250% of the yearly salary.

Studies on aging employees reported older employees identified training as a top priority for adults 55 years and older [6]. Additionally, employers identified the expense in training older workers to meet technological demands as a barrier in retaining older employees in the workforce [6]. Research about the implications of aging employees in the workforce is extensive. However, human resource management surveys indicate many employers do not have appropriate resources and are not prepared to meet the critical needs of a growing, aging population in the workforce [3, 5, 34, 6, 7].

Bridging the gap in the research will help to retain expert knowledge in the workforce for knowledge transfer and decreased turnover rate [3, 31, 30, 7]. New research will also improve attitudes and beliefs about aging employees, improve employee engagement with older employees, and guard organizations against lawsuits based on the Age Discrimination in Employment Act of 1967 (ADEA) [3, 31, 30, 6].

Research in I/O psychology and organizational management that focuses on the effective training and development necessary to aid aging employees in aligning their skills and competencies with modern organizational demands will drive organizations to sustainable success [15, 35, 36]. By implementing effective training and developing provisions for aging employees in the workplace, organizations will also change and enhance their organizational culture. Building a culture accepting of the capabilities and strengths of the older worker will strengthen the organization and its teams [37]. Organizational culture is what inhibits organizations from implementing change [37]. Therefore, when addressing the aging population in the workplace and working to gain acceptance and buy-in from employees of all ages, the organization needs to look at the overall culture, to address training and change from that aspect as well.

Research shows that appropriate methods of training and development are crucial in retaining older employees in the workplace [38, 15, 39]. Training fills the gap between job skills and organizational and employee needs [39]. Training for older employees is identified as a priority for organizations to meet the needs of aging employees in the workplace [3, 31, 30]. A myth about older employees is that they are technologically challenged and a cause of additional expenses in organizations, which has some organizational leaders questioning the return on investment for training older employees [15]. According to Lockwood [15], advantages of having older employees in the workplace outweigh the disadvantages. To bridge the gap,

prevent ageism lawsuits, increase productivity, and prepare for future aging employees, approaches to training must increase skills for employability of the older worker [40].

### **Theoretical Framework and Learning Theories**

Empirically based training is desired as the methods have been researched and are effective when applied to the designated population [41]. Linking theory and practice helps support the training initiative and the suggested interventions [41]. Organizations spend billions of dollars on training every year; organizational leaders want quality and results [41]. Theories such as adult learning theory, applied learning theory, humanism, social cognitive theory, and constructivism are highlighted here to support the need for appropriate training and development for the aging workforce.

#### **Adult Learning Theory**

Adult learning theory states that adults are problem-based as opposed to content-based [42]. Therefore, adults need to learn the material in a manner that is applicable and important to current employment situations [42]. As well, adults are motivated internally, so if the information is relevant to current employment situation, then adults will perform better, gaining more benefits: this is the concept of *andragogy* [42, 43]. Andragogy, first presented by Knowles [44], is different from pedagogy, which is the practice of teaching children.

Andragogy uses the adult's life experience as a basis for the learning platform [44]. Knowles [44] stated the adult has lived their life up to this point, therefore, they have a substantial amount of experience and knowledge with which to process and apply new information. When educators of adults can create experiential situations for the adult learners, the understanding, and retention of the material taught is more salient and more easily retained [44]. The adult learner best learns, not in situations where they are dictated to, but in situations where they can express the problem in which they find themselves. The adult can then utilize the wisdom and experience of others to solve the problem. Adult learners desire to learn and contribute to their environment, and to the cultures in which they exist [14].

#### **Group Development Theory**

Group development theory can help with rational problem-solving behavior and with relationship building [45]. Bringing together four generations, potentially five, will significantly influence group dynamics. Groups are complex systems, which if not treated as such can become unproductive, dysfunctional, off task, and even contentious. Knowing this about groups and knowing how to address groups as a complex system can prevent these negative behaviors [46]. Organizations need to understand how to engage the different generations to make the most of the training, learning, and results. Emotional interference is common in groups and can hinder the progression of task accomplishment or completion [46]. Understanding that there will likely be emotions brought to the table by each member can help managers neutralize any threat of negative conflict before it becomes prevalent [46].

Recognizing the effect of emotion in groups can assist managers in assessing the personal styles of others, strategizing meetings more effectively, and choosing which combinations of employees and training elements are best for a particular group [47, 48]. When the manager understands the group is a dynamic entity and each member will have and express emotions, they

can address and manage the group in an appropriate, effective way [47, 48]. When the manager addresses the group from a place of understanding and forethought, this approach enables the employees to recognize they can learn from the differing viewpoints in the group, therefore preempting negative emotional resistance [47]. Additionally, respecting and acknowledging that the group is a dynamic entity, encouraging its growth through expression, conversation, and learning, will all assist with employee engagement and further the motivation [49].

In the same manner, understanding group development theory can help with rational problem-solving behavior. The manager can help the participants address challenging behaviors that are interfering with appropriate and necessary problem solving; furthering the group goal of staying on task and developing positive relationships [45]. Addressing the group via group development theory and from the standpoint of experiential learning will help with balancing the task and relationship needs of the group as well as understanding the personal needs and styles of the participants within the group [50]. When managers understand the different dynamics in a group, they can better help the group to achieve its end goals, furthering the purposes of the organization [48].

### **Theory X and Theory Y**

Theory X and Y is another group dynamic theory that addresses how the manager interacts with the employees in a group. Theory of X and Y [51, 52] states the way one views humanity will create a self-fulfilling prophecy. According to Kopelman, Prottas, and Falk [51], Theory X is the negative view of the group and its individuals, with Theory Y being the positive side.

Relating to managers and employees, Theory X states if the manager goes into the department thinking the group members are opposed, non-participatory, and not willing to work toward their goals without being coerced, then the group is likely to behave in that manner [51, 52]. However Theory Y assumes people are energetic, creative, want to participate and work, and do not need to be coerced into working on tasks or interacting [51, 52]. Therefore, if the manager operates under the guidance of Theory Y, their employees are likely to be positive, energetic, and ready to work.

Another caveat of this theory is that the managers make assumptions about groups and employees without realizing what they are doing [51]. As a result, determining the root cause of challenging behavior can be difficult because the manager does not realize they are the one setting the group behavior and culture [51]. Knowing this information and the intricacies of the theory can aid the manager not only in approaching the group with an appropriate attitude, but also in coaching the other managers to do the same.

### **Contingency Theory**

An effective leader can achieve success for their group and within themselves if they are aware of the theories of leadership management. Fiedler's contingency model [52] states leadership style is most effective when it matches the particular situation one is leading and matches the needs of the participants. Encouraging managers to understand this model will assist them in the understanding leadership is a flexible and dynamic position most effective when the leader can best match the needs of the participants. Organizations employing multiple

generations will require managers be able to flex and flow with their employees and the needs of their employees, in order to keep them on task, building relationships, achieving and maintaining productivity, and being effective.

More than that, research shows that productivity, learning, and knowledge of those in the group, increases with managers' ability to utilize knowledge from across the workplace, and furthers the strategy of meeting organizational needs [53]. Research also shows there may not be that many differences in the desires of the varying generations as they relate to work [54]. However, without doing some investigation and getting familiar with their groups, managers will not know the needs of the individuals or the group [54].

### **Path-Goal Theory**

The path-goal theory is another theory that is appropriate to mention as a backdrop for training older workers in conjunction with the younger generations. The path-goal theory, proposed by House [55] is an offshoot of Vroom's contingency theory [52], which states that when there are no obstacles in the way of the goal achievement, participants are more likely to achieve satisfaction and therefore motivation [52]. The leader is in a position to guide the employees by removing obstacles from the path that is leading to their goal [52]. When barriers eliminated and goals are attained, both the leader and the employees are motivated by the success [52].

However, the type of guidance the leader provides will also depend on the type of guidance and motivation the employees' needs [52]. Silverthorne [56] stated the path goal theory indicates leaders are at their best when they can adapt their leadership style to fit the situation and the subordinates. Therefore, the leader must assess each person and each generational context to further decide what the obstacles are and how best to remove them. Each generation on a team will have a different way they respond to motivational tactics; knowing that differences exist will assist the leader in deciphering the needs of each of the participants and determining how best to motivate, guide, and lead.

### **Applied Learning Theories**

People learn in different ways, which are captured in a variety of learning theories [57]. The learning theories which pertain to how organizations can better prepare for the aging workforce and which are relevant to training the older workforce include humanism, cognitivism, social cognitive theory, and constructivism [43]. Regarding learning theory and instruction, it necessitates looking at the way the participants learn. Every department in an organization has within it a diverse group of people with a variety of learning styles because each person is a unique individual [58]. Therefore, to maximize any learning experience there should be a variety of teaching tools used, such as visual, auditory, active, and passive tools.

### **Humanism**

The basis of the humanistic theory is the overarching development of a person and the means they can use to achieve their development, as well as the ways they overcome obstacles [59]. Knowing what each employee strives for and what is important to them for their development, as well as how they best respond to different tools and teaching, will help the managers and leadership maximize the learning and teaching of their subordinates [60]. Bryant

and Wolfram Cox [61] emphasize the importance of keeping employees engaged and growing with the organization by ensuring that organizations maintain a humanistic approach.

Using appropriate teaching mechanisms and methods for the aging population and incorporating all of the generations into the learning and training will help to develop all of the employees [58]. Developing the employees will help their performance, and their subsequent accomplishments will encourage their overall sense of personal success, furthering their initiative and drive toward the organizational mission [58, 59]. According to research, sustained personal success will foster more motivation and development, furthering the cycle of learning and collaboration [62].

### **Cognitivism**

Cognitivism shifts away from a behavioral point of view to a mental perspective. This theory delineates the person uses prior experiences to filter and process incoming information to move it from abstract concepts to concrete functions [43]. As well, a person can move beyond just the concrete functioning to perform creative problem solving related to the issue [43]. Managers and leaders who view the diversity and uniqueness in their departments through a cognitivist lens will see strengths in the differences, as diversity can enhance creativity, cohesion, and productivity [63].

A cognitive lens can be used to help structure and develop training for the older workforce, by tying training and coaching in with experiences, the workers have had in their lifetimes. Looking at the situation and workgroups through the lens of cognitivism will assist leaders in helping employees to figure out how best to collaborate within departments that have a variety of age groups and generations. Diversity in the workgroups as well as the life experiences of the employees will provide rich foundations for a variety of training formulas.

### **Social Cognitive Theory**

Social cognitive theory (SCT) states learning occurs most in social contexts [43]. As SCT emphasizes that people can learn from others in their environment through observation and modeling, the theory is well suited to be foundational for managers working with multiple generations. Within the context of multiple generations, the employees will have the opportunity to learn from each other: older generations modeling a variety of disciplined behaviors while the younger generations teach the traditionalists to use technology and the multiple methods of communication and applications.

Each of the generations has something to offer each of the others, but those in management and leadership need to be aware of theory and foundation to appropriately align and encourage the multigenerational groups and their interactions. Knowing the strengths of each generation and group will be instrumental for cohesion as well. For instance, as the younger generations are adept at using technology, they can serve as coaches and mentors to the older generations, and the older generations can model good work ethic. Cekada [64] highlights pairing those of different generations serves a dual function of assisting the older generation with learning the technology, and motivating the younger generation by placing them in leadership roles.

### **Constructivism**

The constructivist theory is more a collection of ideas rather than a theory, which implies learning, evolves out of an experience [43]. In essence, the learning comes when people can derive meaning from their experience [43]. Again, in this case, the older workers have a lifetime of experience they can use when working with the younger generations. The aging population can impart knowledge to the younger generations, such as good work ethic, discipline, respect, and a different way of thinking about the purpose of work. The younger generation can teach those in the older generations about technology, the different uses for it, and the way the younger generation thinks and feels about work as it relates to their world and generation.

Working together will provide all generations with new and different experiences and help with explanations behind the reasons they do things. The grouping of generations and effective facilitation of their training will serve also to help in breaking stereotypes, and enhancing the knowledge and experience gained at work, and in life [65, 66]. When managers and leadership are aware of the generational differences and respect those differences, they can better facilitate the training and instruction of all of the generations, maximizing the group cohesion and outcomes [64].

### **Self-Determination Theory**

Self-determination theory (SDT) is a theory that addresses the motivation of an individual and how to keep the individual sustaining the motivation [67]. Key components of SDT include that the individual's workplace autonomy is encouraged, that the individual is included in decision-making processes, that a person feels a sense of competence at their job, and that they have supportive and satisfying social relationships [68, 67]. These factors foster intrinsic motivation for the work the person is doing, which sustains motivation, as opposed to the person being motivated by short-term rewards [67]. Understanding the different needs of those in the workplace is paramount to assessing and determining what motivates the worker [65, 66].

Managers who are intrinsically motivated because they like what they do, believe they are good at their job, and enjoy the people they work with are more likely able to foster the same motivation in others due to their genuineness, authenticity, and energy, which lead to increased employee trust, job satisfaction, and overall positive results [69]. Managers, therefore, play a large part in the fostering of cohesion of the teams with multiple generations. Managerial responsibilities include encouraging self-determination in their people and teaching their employees how to work together to support each other [68]. Each employee in each generation has something to offer the team; if they can appreciate the new skills they are learning with the other members of their team, the team can be cohesive and utilize each other's strengths to approach work-related challenges and tasks [65].

However, a key factor for managers, according to Benson and Brown [65], is to find a balance between creating multigenerational team cohesion, while still allowing individualism amongst team members. Benson and Brown [65] noted when managers foster team cohesion amongst a team of multi-generational workers more learning takes place. However, at the same time, managers need to encourage individualism so the sharing of knowledge from the different generations can still exist [65].

### **Conclusion**



The literature indicates a growing number of older workers will remain in the workplace beyond the normal retirement age of 65. Developing an empirically and theoretically based training approach designed to meet the unique learning needs of the aging employees is crucial to the future of a successful organizational workforce. Despite extensive research indicating an increase in older employees in the workplace, many organizations are not prepared to meet the challenges of older employees in the workplace. Appropriate, specialized training and development are identified as priorities in meeting the challenges of the changing workforce. Developing empirically valid and reliable training methods for older employees will bridge the identified gap and contribute new knowledge to the field of industrial-organizational psychology regarding the areas of learning and management theories, as well as organizational training and development.

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### Acknowledgement

The authors wish to acknowledge and thank Dr. Kelley Conrad, PhD, and the University of Phoenix, School of Advanced Studies for teaching and guidance. The authors also wish to thank our families for their love, support, understanding, and patience through this process.