

INNOVATIVE PRACTICES

EXECUTIVE CASE REPORT NO. 5

**FLEX STRATEGIES TO ATTRACT,
ENGAGE & RETAIN OLDER WORKERS**

CENTRAL **BAPTIST** HOSPITAL


Marriott

MITRE

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Acknowledgements:

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

Each year, we collaborate with our employer partners to select one strategic area of focus for case studies, conduct in-depth interviews, and publish a report on innovative practices.

We would like to thank the following organizations for their sponsorship of our 2011 case study project, “*Flex Strategies to Attract, Engage & Retain Older Workers*”: Abbott, AstraZeneca, Central Baptist Hospital, CVS Caremark, Marriott International, MITRE Corporation, and Wells Fargo.

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EXECUTIVE SUMMARY

As a nation, we have been concerned for more than half a century about issues related to our aging workforce. In August 1950, the first national Conference on Aging was held in Washington, D.C. to fulfill President Truman's request for a report on "the problems incident to our increasingly older population." The conference planners believed the event should have a wide scope, because studies had shown that the period of "retirement or old age" was lengthening and that problems adjusting to aging were as "broad as life itself."

Today, life expectancy continues to rise and the country's age distribution is shifting upward. According to 2010 US Census data, our population's median age is 37.2, up from 32.6 in 1990; 39% of us are older than 45, up from 31% in 1990; and, for the first time, people who are 45 and older represent a majority (53%) of the voting-age population.¹

At the Sloan Center on Aging & Work, we were interested in continuing our research on innovative practices that address the needs of older workers and business. In 2011, we launched a project titled "*Flex Strategies to Attract, Engage & Retain Older Workers*" to answer the following questions:

1. Do organizations have workplace flexibility strategies?
2. How do employers incorporate age into their flexibility strategies?
3. How are organizations making decisions about flexibility issues related to older workers?
4. What business drivers are influencing employers' decisions about flexibility and older workers?
5. What innovative practices are employers developing in such areas of workplace flexibility as scheduling, hours worked, place of work, career flow, and job design?
6. What challenges have employers faced in launching innovative practices?
7. How are employers measuring success?

This paper explores each of these questions through case studies of three Sloan Center employer partners: Central Baptist Hospital, Marriott International, and MITRE Corporation.

Organization	Innovative Practice	Description
Central Baptist Hospital	Career coaching	Career flexibility addressed by a leadership succession and competency program to identify and retain organizational talent.
Marriott International	Hourly flexibility	Innovative options for scheduling, career, and work design flexibility.
MITRE Corporation	Phased retirement	Flexible options to transition into retirement.
	Part-time on-call	
Also briefly highlighted in the report are the following innovative practices of other Sloan Center on Aging & Work employer partners:		
CVS Caremark	Snowbird Program	Program that enables older workers to transfer to stores in other regions on a seasonal basis.
Cornell University	Encore Cornell	Program for retirees focusing on project work, consulting, volunteerism, and Web site resources.

Key Discoveries

From the research and interviews we conducted for this project, four discoveries emerged:

1. **Workplace flexibility strategy, in general, is not formally defined.**

Each employer has in place a variety of informal flexibility strategies enabling employees of all ages to accomplish work in the most efficient and collaborative manner. Among these strategies are practices that specifically meet the needs of older workers. However, in their communications with employees, the employers describe flexibility strategies as offering something for employees at every stage of life.

2. **Issues that formed the business case for flexibility are broad.**

The following drivers motivated employers to initiate flexibility strategies:

- recruit, retain, and engage older workers
- retain experienced staff and circumvent massive retirements
- “re-career” older workers instead of losing them to external opportunities
- help older workers continue to be effective on the job
- engage retirees and tap into their knowledge and skills

3. **Organizations should take the dimensions that influence perceptions of age—a concept that the Sloan Center has deemed the “Prism of Age”—into account in their efforts to develop promising flexibility practices.**

Each of the employers was familiar with the Sloan Center’s Prism of Age framework (described in detail on page 15) and how the dimensions it captures influence the design of solutions to meet the needs of the aging workforce. Having a clear understanding of the dimensions that shape employees’ perceptions of age and related life and career stages is important when launching innovative practices.

4. **Innovative practices address the concerns of managers.**

For each employer, it was important for the flexibility solutions they developed to address managers’ concerns about trust, losing control, coaching older workers, and to help managers understand how to implement some of the more innovative approaches to job design, scheduling, and career flexibility.

PROJECT BACKGROUND AND METHODOLOGY

“Flex Strategies to Attract, Engage & Retain Older Workers”—a project launched in 2011 by the Sloan Center on Aging & Work at Boston College—consisted of three primary components:

- a literature review of workplace flexibility as it relates to the older worker
- telephone interviews with human resources managers at leading organizations that are the center’s employer partners
- case histories of three organizations, with examples of their strategies and initiatives to support older workers

The literature review revealed trends in the following domains:

- the participation of older workers in the labor force
- how workers are rethinking retirement
- employer strategies to recruit and retain older workers
- how flexibility contributes to positive outcomes in the work and lives of older workers
- approaches to workplace flexibility that meet the needs of older workers

Interviews with employers revealed strategic approaches to workplace flexibility and their innovative practices. Basic questions were answered about their organizations’ flexibility strategies, in general, and as they relate to older workers; business drivers influencing decisions about flexibility; challenges they faced developing a flexibility strategy and initiatives; and promising practices they have launched.

The center conducted telephone interviews with four senior managers in the human resources departments of the three organizations. The interviews were one and a half hours to two hours long and covered the following topics:

- the organization’s flexibility strategies overall and those that seem to be of special interest to older workers
- business drivers influencing decisions about flexible work options
- challenges the organization confronted in developing a flexibility strategy and initiatives
- innovative practices the organization has launched

Researchers recorded the interviews for reference when they developed the case histories. Employers provided data to supplement the interviews and responded to follow-up questions.

INTRODUCTION

The median age of the US population and workforce continues to increase as the oldest baby boomers turned 65 in 2011. At the same time, the country's economic challenges are pushing older workers to adjust their expected retirement dates and stay in the workforce longer. Employers are paying attention to these trends.

For some employers, the greatest concern is the increasing age of their current workforce and the ability of workers to remain productive in their 60s, 70s, and even 80s. For others, the pressing issue is how to replace highly skilled workers when they retire. Still others focus on recruiting older workers or engaging retirees who can mentor new employees, fill part-time or seasonal positions, or provide specialized expertise. By considering the broad definition of workplace flexibility, including the many ways we design, structure, and accomplish work throughout life, employers are finding successful solutions to meet these business needs.

This report examines successful workplace flexibility strategies and reports on their impact on older workers and employers. The report presents findings from in-depth interviews with three organizations: Central Baptist Hospital, Marriott International, and MITRE Corporation. For each of these employers, the report describes the workplace flexibility strategy and a innovative practice along with the business case, implementation steps, metrics of success, and future outlook.

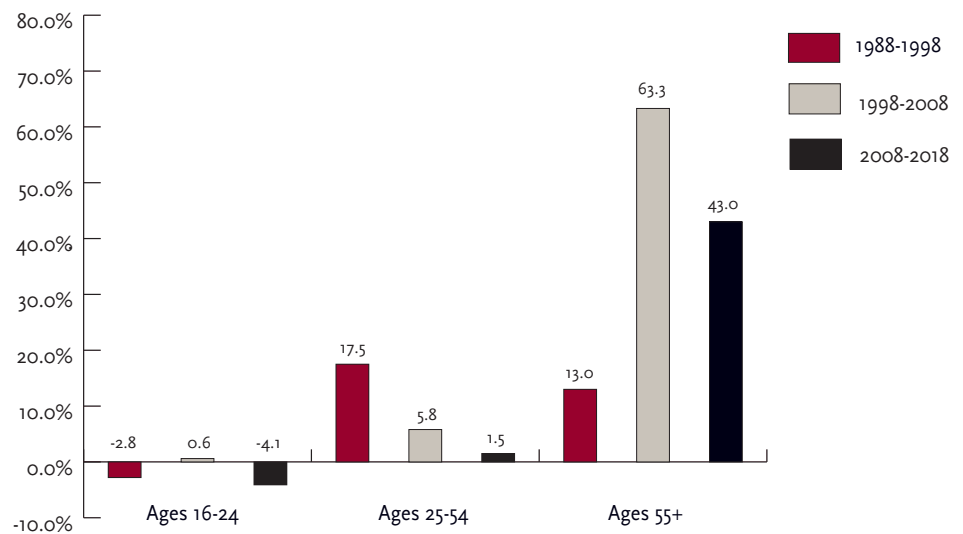
UNDERSTANDING THE GENERATIONAL LANDSCAPE

The oldest baby boomers (born 1946 to 1964) have already turned 65. Every day through 2029, another 10,000 boomers will join them. By 2030, all boomers will have reached this milestone and 18% of the population will be 65 and older.²

More older workers on the job

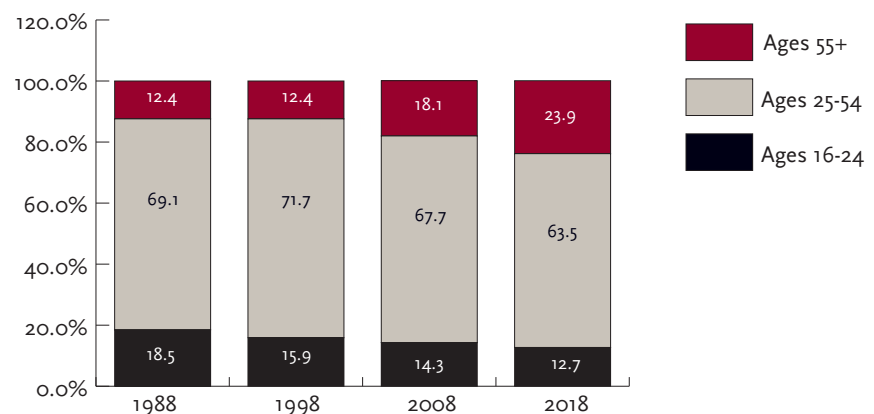
The American workforce is also aging—a trend that is projected to continue for decades. An analysis of 2010 US Census data revealed that over the past decade the percentage of all people age 55 and older who are in the labor force increased from 32.4% to 40.2%.³ The Bureau of Labor Statistics estimates that over the ten-year period from 2008 to 2018, the population will grow at a slower rate than in the previous decade and that the labor force participation rate will decrease, indicating a slowdown in labor force growth. During this period, the labor force participation by workers who are 55 and older is expected to increase by 43.0%, while participation by the youngest workers (age 16 to 24) will decrease. (See Figure 1.)⁴

Figure 1: Labor Force Trends, Percent Change: 1988-2018



By 2018, people who are 55 and older are projected to occupy 23.9% of the workforce, nearly double the percentage in 1998. (See Figure 2.)⁵

Figure 2: Labor Force Trends, Percent Distribution: 1988-2018



Older workers rethink retirement age

According to a study that the AARP conducted in early 2011, 36% of American baby boomers who are in the workforce feel they may not be able to retire; only 15% expect not to work at all during their retirement years.⁶ The 2011 Retirement Confidence Survey, conducted by the Employee Benefit Research Institute (EBRI), found that workers of all ages are planning to retire later and most (74%) expect to work for pay after “retirement.” In the past decade, the percentage of workers expecting to retire after age 65 has increased significantly in every age group. (See Table 1.)⁷

Table 1: Expected Age At Retirement

	All workers		Ages 25-34		Ages 35-44		Ages 45-54		Ages 55+	
	2001	2011	2001	2011	2001	2011	2001	2011	2001	2011
Younger than 60	18%	7%	26%	12%	16%	7%	16%	6%	7%	3%
Ages 60 to 64	22	16	18	14	20	16	23	13	37	22
Age 65	30	26	32	26	31	32	28	24	25	19
Age 66 or older	16	36	11	30	21	35	14	39	18	41
Never retire	7	8	4	9	6	3	10	11	7	9
Don't know/ refused	8	6	8	6	7	7	9	5	6	7

The economic downturn has had an effect on retirement plans. A national survey conducted by the MetLife Mature Market Institute in 2009 found that half of the respondents between the ages of 55 and 70 had in the previous two years changed their minds about how soon they could retire and had put the date off. Of these respondents, 67% said they needed to rebuild financial resources; 41% said they needed to supplement pensions or Social Security; 28% expressed a need for continued access to company-provided benefits. Only 15% cited “enjoy working” as their reason to defer retirement. More than half (55%) said their primary motivation to continue working was to maintain income for basic expenses.⁸

Strategies to recruit, engage, and retain older workers

The increasing rate of participation by older people in the workforce will not compensate for the decreasing rate of participation by younger people. The US Bureau of Labor Statistics has projected an overall decrease of 1.5 % in the labor force participation rate by 2018.⁹

In response, employers are developing strategies to recruit and retain older workers. In 2010 the Society of Human Resource Management (SHRM) collaborated with AARP to conduct a poll of human resources administrators on strategic workforce planning. They found that 60% of the organizations responding had some initiatives in place to attract, engage, and retain older workers. Findings about the use of strategies specifically to recruit and retain workers past retirement age are outlined in Table 2.¹⁰

Table 2: Strategies to Recruit and Retain Workers Past Traditional Retirement Age

Employer strategies	Percentage currently using	Percentage who anticipate using
Offering part-time positions	42%	27%
Hiring retirees as consultants or temporary workers	40%	23%
Offering flexible work arrangements for older workers	36%	27%
Encouraging employees to work past traditional retirement age	22%	19%
Providing training to upgrade skills	21%	20%
Instituting phased retirement	18%	26%
Providing opportunities to transfer to jobs with reduced pay and responsibilities	16%	24%
Establishing alternative career tracks	12%	21%

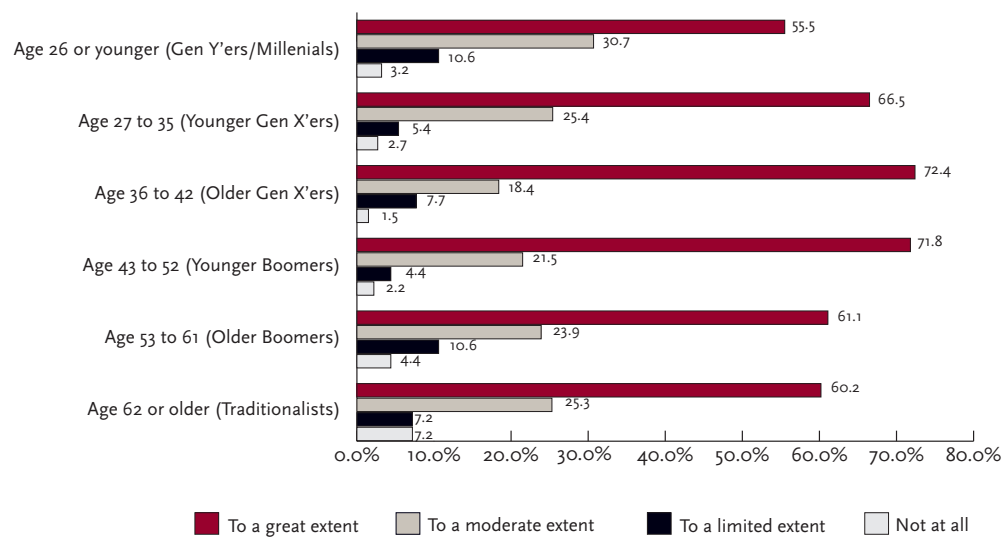
Source: Chart created using findings from SHRM-AARP Strategic Workforce Planning Poll: SHRM, 2010.

Older workers want flexibility

The Age & Generations Study, which we conducted from November 2007 to September 2008, found that flexibility can contribute to building a healthy and effective workplace, offering positive outcomes for employees. Here are four of the study's key findings:

- Access to flexibility predicts greater employee engagement, less stress related to perceptions of work overload, better physical and mental health, and greater satisfaction with the degree of balance achievable between work and family life.
- Access to flexible work options contributes to overall quality of life “to a great extent” for the majority of workers in each age group. (See [Figure 3](#).)
- The odds that a worker will have flexibility fit—the extent to which flexible work options promote employee effectiveness at work and at home—are 74% higher for employees between the ages of 27 and 35 than for those who are 53 and older.
- Flexibility fit may increase with the extent to which employees have:
 - » access to workplace flexibility
 - » supervisor support for workplace flexibility
 - » work team support for workplace flexibility
 - » a positive work-family culture on the job
 - » the ability to actually use workplace flexibility options¹¹

Figure 3: Flexibility Contributing to Overall Quality of Life by Generation*,
% of respondents



* Items developed by the Sloan Center on Aging & Work, 2007

WORKPLACE FLEXIBILITY AND OLDER WORKERS

In workplaces across the United States, many types of flexible work options are in practice. The following chart, though not an exhaustive list of all of the types of workplace flexibility, highlights options likely to be attractive to older workers.^{12,13}

Table 3: Flexibility options useful to older workers*

Flexibility categories	Flexibility options	Examples of flexibility in practice
Scheduling of hours	Flextime: Adjusting workday start and end times while maintaining the same number of hours per day or week	<ul style="list-style-type: none"> • Daily flex: For example, working from 6:00 a.m. to 2:00 p.m. on a daily basis • Day-of-the-week flex: Flexing work hours on a particular day of the week • Flexible breaks: Having control over the schedule of breaks, allowing employees to leave work for a doctor's appointment or to check on an elderly parent (for example) and make up the time later in the day or week • Core hours: Everyone works during specified core hours, but can flex on either end. For example, core hours might be from 9:30 a.m. to 2:00 p.m., but employees may start as early as 7:00 a.m. or leave as late as 6:00 p.m.
	Compressed workweeks: Full-time options that allow employees to work longer days for part of a week or pay period in exchange for shorter days or a day off during that week or pay period	<ul style="list-style-type: none"> • 4-day workweek (also called 4/10): 10-hour days • 3-day workweek (also called 3/12): 12-hour days • 4 1/2-day workweek: Four 9-hour days and one 4-hour day per week • 9-day biweekly (also called 9/80): Working 80 hours in 9 days (typically 8 days at 9 hours and 1 day at 8 hours) and taking the 10th day off (<i>must consider federal/state overtime laws when implementing this option for non-exempt employees</i>)

Flexibility categories	Flexibility options	Examples of flexibility in practice
	Split shifts: Work day is split into two segments	Working from 5:00 a.m. to 9:00 a.m. and returning to work from 1:00 p.m. to 5:00 p.m.
Number of hours	Reduced work schedule: Working 35 or fewer hours a week.	With prorated benefits
	Job sharing: Full-time position shared by two people, each working part-time hours.	With prorated benefits
	Part-year or annualized work: The number of hours worked are calculated on an annual rather than a weekly basis, enabling flexibility in scheduling blocks of time off.	Similar to a teacher's schedule, with the summer months off
	Phased retirement: Gradual reduction of work hours and responsibilities for the purpose of easing into full retirement	
Place of work	Telecommuting: Working from a remote location one or more days a week	<ul style="list-style-type: none"> • Home office: Designated office space at employee's home • Satellite or neighborhood office: Remote office established by one or more employers, typically in a community with a large concentration of employees • Hoteling: Designating shared workspaces at a company location for use by employees who usually work remotely but occasionally work on site
	Job relocation: Periodically or seasonally changing the place of work	Snowbird program (an example is featured later in this report) enabling employees to work in warmer climates during the winter months
Organization of career	Sabbatical: Unpaid or paid time off for the purpose of personal enrichment or volunteerism	
	Secondment programs: temporary loan of an employee to a charitable organization for a specific purpose and timeframe that mutually benefits all parties	

Flexibility categories	Flexibility options	Examples of flexibility in practice
	Retraining for a new position	May involve on-the-job training or returning to school
	Off-ramping	<ul style="list-style-type: none"> • Taking on a job with fewer responsibilities • Transitioning to a job without supervisory responsibilities • Scaling back on travel
	Cross-training	Training for inter- or intra-departmental positions and rotating on a regular or occasional basis to gain additional skills, increase hours worked, or distribute physical tasks
Time away from work	Time-off flexibility: A wide range of flexible time away from work	Caregiving leaves
	Paid time off (PTO) bank enables greater flexibility and privacy in how employees use their paid time off	
Design of job	Work redesign: Evaluating all aspects of a job on an individual or work team basis and adjusting to meet personal needs as well as productivity and efficiency	<ul style="list-style-type: none"> • Permit flexibility within job roles and redesign the job if necessary, including how tasks are accomplished; how the workload is distributed; and how teams collaborate • Assessing workload, inefficiencies, and low-value tasks • Adjusting how teams accomplish and share work
Structure of employment relationship	Contract, temporary, and seasonal work	
	Retiree pool: Available to work on special projects, mentor and coach employees, or provide on-call support	Internal employment center for retirees

Source: Chart adapted from work by Roundtree Consulting, LLC.

Examples of organizational approaches

In addition to the employers featured in our case studies (beginning on page 16), the following employer partners of the Sloan Center on Aging & Work have implemented career flexibility programs that are yielding positive outcomes for older workers and the employers, as well.

CVS CAREMARK

Headquartered in Woonsocket, Rhode Island, CVS Caremark is the largest pharmacy health care provider in the United States. The company operates more than 7,300 retail stores and employs approximately 200,000 employees (called colleagues by CVS Caremark).¹⁴

Since the early 1990s, CVS Caremark has focused on increasing the number of colleagues who are 50 and older through its Mature Worker Programs and partnerships with groups such as the American Society on Aging, AARP, National Caucus & Center on Black Aged (NCBA), Senior Community Service Employment Program, and others. For CVS/pharmacy, mature workers make good business sense—they understand customers' needs, are loyal and committed to customer service, bring unique skills and experiences to their jobs, and help diversify the workforce.¹⁵

One of the company's highly lauded initiatives offers older workers unique workplace flexibility. The "Snowbird Program," implemented in 2004, enables older workers to transfer to different CVS/pharmacy store regions on a seasonal basis to work as pharmacists, greeting-card specialists, cosmetic consultants, and photo supervisors. This program is popular among those who migrate from the northeast to Florida during the winter. As of 2011, CVS Caremark estimated that about a thousand people had participated.

The Snowbird Program and other initiatives focused on mature workers have resulted in significantly higher retention rates of older workers than the industry average; enabled CVS to manage increased business in warmer-climate stores in the winter; and increased loyalty of older customers, some of whom are snowbirds, too.¹⁶ Over the past two decades, as a result of the mature worker programs, the number of colleagues aged 50 and older has increased from 7% to 22%.¹⁷

CORNELL UNIVERSITY

Cornell University, located in Ithaca, New York, employs 12,520 staff and educators. To tap into the knowledge and skills of its retirees and foster an ongoing relationship with Cornell, the university designed and launched Encore Cornell, in 2009. This suite of programs has the following four components.

- *Encore Hire* provides resources to link retirees to temporary employment opportunities at Cornell that can be accomplished in two months or less, often remotely.
- *Encore On-Call* offers retirees opportunities to volunteer their expertise upon the request of members of the Cornell community.
- *Encore Volunteer* connects retirees to a wide range of local and national volunteer opportunities.
- *Encore @ More* is a robust Web site with information and resources for retirees on upcoming events, Cornell resources, and links to external organizations.¹⁸



PRISM OF AGE

In 2010, the Sloan Center on Aging & Work published the results of research on various dimensions of age. Termed the 'Prism of Age,' this multidimensional framework has expanded workplace conversations about recruiting, engaging, and retaining older workers. The framework's objectives are to encourage employers to challenge generational assumptions and to look beyond chronological age when creating solutions that meet the needs of older workers and businesses. Listed below are the dimensions that influence our perceptions of age—as employees, co-workers, and employers. For a complete list and more information on the Prism of Age, please see: http://www.bc.edu/content/dam/files/research_sites/agingandwork/pdf/publications/case_TM.pdf

Chronological age: the number of years a person has lived.

Generational age: a defined period of time when people were born that impacts the way they see the world and is based on similar experiences, economic circumstances, historical events, and dominant cultural values.

Physical-Cognitive age: the physical and cognitive changes that occur over time and which affect individuals abilities and functioning.

Social age: how other people gauge an individual's age.

Life Events age: important transitional events that shape major life roles.

Tenure/Organizational (age): the number of years an individual works for a particular organization to organizational age.

Career stage/Occupational (age): the development of career competencies and experiences that position an individual along a developmental calibration.

Relative age: a comparison of an individual's chronological age with a relevant referent group.

Subjective age: the overall assessment of an individual's life stage or the feeling of being younger or older than others of the same chronological age.

Normative age: an individual's perception of his/her age in the context of either normative and/or personal expectations.

Socio-emotional age: refers to developmental changes in psychological development and one's place in the social world.

ORGANIZATION INFORMATION

Company description	This 383-bed acute care facility and major medical research and education center serves central and eastern Kentucky. The hospital offers advanced medical facilities, technologies, and capabilities.
Type of organization	Nonprofit hospital with community-based diagnostic centers
Main location	Lexington, Kentucky
Workforce	2,600 employees; 80 physicians 96% female Majority are licensed, professional staff
Average age of workforce	42 years
Web site	www.centralbap.com

INNOVATIVE PRACTICE AT A GLANCE

Name of initiative	Career coaching
Description	Career flexibility focus in a leadership succession and competency program to identify and retain organizational talent
Target population	Mid- to late-career nursing staff
Launch date	Summer 2008

FLEXIBILITY STRATEGY

Our philosophy of flexibility changes as we respond to the changing workforce. We are cautious to balance our response to meeting older workers' needs with what's right for other generations as an employer of choice. We have six generations in our workplace and need to consider employee needs across our work sector—from the 20-year-old to the 75-year-old—as we develop and support programs and services.

~ Karen Hill, Chief Operating Officer/Chief Nursing Officer,
Central Baptist Hospital

For some staff at Central Baptist Hospital (CBH), flexibility is all about scheduling and days off. Others view flexibility as variable hours. Some desire autonomy over their time at work—the ability to come and go. Still others want to follow the ebb and flow of life and “re-career” along the way. The administrators of CBH believe they must focus on listening to employees—especially older employees—before they implement new approaches to work. In fact, assessing employee needs and analyzing engagement survey feedback are formal components of CBH’s multiyear “Workforce Development Strategic Plan.” At the same time, CBH is steadfast about keeping workplace flexibility informal, believing that approach is best for their business and staff and keeps the focus on the patient.

Incorporating age in a flexibility strategy

Administrators of CBH identified three key issues related to older workers and responded to them in the hospital’s flexibility strategy.

- Fact:** Patient outcomes at CBH exceed industry benchmarks, in part because the hospital has experienced staff.

Strategy: To retain experienced workers and circumvent massive retirements and transitions, workplace flexibility became the number one objective of CBH’s retention strategy for older, experienced staff.
- Fact:** Programs ranging from subsidized child care to transitions to retirement are in place at CBH to meet life stage needs. Practices to enhance employee satisfaction and engagement were not as prominent in the organization prior to adoption of the workforce development plan.

Strategy: Focus on initiatives targeted to enhance employee satisfaction and engagement among older, experienced staff. Train department directors to implement flexible approaches to employee issues in each department.
- Fact:** Succession planning was focused on early-career and mid-career staff.

Strategy: Expand the focus of succession planning to include re-careering of mid-career and late-career staff, using such tools as mentoring, training, and tuition reimbursement, thus keeping these experienced employees in the workforce longer.

Central Baptist Hospital's workforce development plan (fiscal year 2011-2012) includes:

Key strategy: Engaged workforce

Create systems and programs that will engage employees as partners in improving quality, patient safety, and organizational development.

- Formalize opportunities for generational and organizational transfer of knowledge.
- Implement formal coaching and mentoring and/or precepting roles for knowledge transfer and for the development of professional staff.
- Investigate strategic opportunities for flexible scheduling, including phased retirement and succession planning.
- Implement two pilot programs that address any of the following: flexible scheduling, phased retirement, and succession planning.

BUSINESS CASE

An approach for flexibility has to be a mindset from the top. It has to be an organizational priority, not just something employees want. We have worked really hard to raise the consciousness of our leaders and were successful in incorporating flexibility into the organization's strategic plan.

~ Karen Hill, Chief Operating Officer/Chief Nursing Officer,
Central Baptist Hospital

As the demand for healthcare increases, the nursing shortage in the United States has intensified. Although many nurses begin to scale back their hours or retire at age 55, the average age of registered nurses (RNs) has steadily increased over the past two decades. In 2008, the average age of RNs was 47.0 years,¹⁹ up from 40.3 years in 1980.²⁰ The share of RNs older than 50 in 2008 was 45% an increase from 33% in 2000.²¹ Today, nearly half of all RNs (49%) are baby boomers—born between 1946 and 1964.²²

These statistics add urgency to the business imperative of implementing strategies to retain older, experienced nurses. Replacing experienced workers is costly and research demonstrates that losing nursing experience can have a negative impact on

patient quality of care, safety, and satisfaction, as well as employee engagement and organizational performance.²³

For CBH, the business drivers for a focus on older, experienced workers included:

- predicted nursing shortage
- retention
- turnover
- succession planning
- employee satisfaction and engagement

In drafting the strategic plan, CBH adopted the definition of older worker used in a research paper on retention of nurses published by the Robert Wood Johnson Foundation: “older/experienced workers” are employees age 45 and older.²⁴ Of the nearly 1,000 RNs on staff at CBH in 2011, 34% fit this demographic—a significant increase from the 20% share in 2002.²⁵

CBH did understand, however, that chronological age by itself does not always signal length of experience. For example, the hospital had recently hired a 51-year-old RN fresh out of nursing school. Merely focusing on age, CBH might have counted this novice applicant in the cohort of experienced nurses. Focusing on chronological age combined with career stage made more sense for the hospital's strategy.

Participating in a study by the Sloan Center on Aging & Work, CBH administrators discovered they needed to broaden their thinking even more. They learned that experienced RNs on their staff between the ages of 29 and 65 identified themselves as being in mid-career. Clearly, in addition to chronological age and career stage, other dimensions of the Prism of Age—for example, socio-emotional age and relative age—were relevant in the CBH workplace. This understanding brought it all into focus for the CBH team. At that point they refined their strategy to take “phases of careers” and the Prism of Age dimensions into account in the retention solutions they were developing.

IMPLEMENTATION

Flexible scheduling

Over the years, in addition to financial and retirement planning and career counseling pitched specifically to employees age 45 and older, CBH has implemented many scheduling and career flexibility options that meet the needs of older nurses. (These options are available to all employees, regardless of age.)

When innovative flexibility is piloted or implemented, participants share outcomes with their colleagues and managers and encourage employees to consider options that might work for them. Naturally, certain types of flexibility do not work in a direct patient care setting. However, CBH is continuously looking for solutions that are feasible for staff members and the hospital. The topic of a flexible workplace culture comes up frequently in meetings at which the strategic plan and the challenges and success stories arising from it are shared.

Here are some examples of workplace flexibility implemented at CBH that are meeting the needs of older nurses:

- **part-time, seasonal positions** with healthcare benefits to match those of full-time employees
- ability to move from **full-time to part-time** while remaining in the same position/level
- ability to transfer to **jobs with reduced patient care** responsibilities, such as a floor nurse position that takes on fewer patients but helps with discharges and quality assurance metrics
- **specific positions with shorter shifts**, such as a float nurse working four-hour shifts to cover lunch breaks
- **job sharing** by sharing a shift or a position/role
- **online self-scheduling** that accepts requests for specific schedules and days off and posts monthly department schedules to facilitate shift changes

Career coaching program

In 2008, CBH launched a career coaching pilot program with mid-career to late-career nurses in mind. The mission was to develop a leadership succession and competency program to identify and retain organizational talent. In the past, career coaching had been delegated to managers, many of whom felt uncomfortable in the role due to lack of coaching skills or concerns that coaching might send a good employee to another department. The coaching program offered RNs support for re-careering: transitioning to different nursing roles or schedules or continuing their education and moving into other health care practice areas.

CBH hired a retired nurse with 40 years of nursing and education experience as the coach. Participation in the program was initially limited to nurses on a single unit and was optional, informal, and confidential. Armed with professional knowledge, expertise, and flexibility, the coach met with nurses at times most convenient for them. The coach had the following objectives:

- Complete a newly developed competency assessment to identify talents, skills, interests, and educational needs.
- Discuss career direction and opportunities.
- Develop an action plan for the nurses to reach specific goals.

The coach assessed the skills and career needs of each participant and aligned them with resources to accomplish their goals, such as tuition reimbursement, mentoring, and precepting opportunities. Originally funded by the American Organization of Nurse Executives Foundation, the one-year pilot was expanded to enable participants to continue coaching beyond the year and to offer coaching to another group of nurses. Of the 36 participants to date, about a third are age 45 and older.

CHALLENGES

The greatest challenge for CBH in implementing flexibility initiatives was moving beyond human resources (HR) policies that were designed to ensure equitable and consistent practices. In reality these are well-intentioned, but they hinder flexible responses to older workers' needs for different schedules, new roles, and innovative career paths.

Additionally, CBH managers and HR professionals lacked the necessary skills to address older workers' issues and provide career coaching effectively. Employees were often hesitant to ask questions, raise issues, or request different schedules or career options. Older workers were not strategic with their own careers, thinking only moment to moment. The career coaching program addressed these issues by helping nurses, HR staff, and managers understand the steps needed to think strategically, develop a plan, and articulate a case for flexibility and re-careering.

OUTCOMES

Administrators at CBH believe the hospital's flexibility strategy and career coaching program have resulted in significant improvements in several areas over the past three years. These are listed below.

- **Retention**
 - » Turnover is well below the national benchmark for health care.
 - » The vacancy rate (the average number of vacant full-time equivalent positions divided by the average number of budgeted full-time equivalent positions) was 1.8% hospital-wide as of 2011 and has been below 3% since 2008.
- **Employee engagement of RNs age 45 and older**
 - » Overall favorable workplace satisfaction ratings increased from 65% in 2006 to 88% in 2010.
 - » Favorable responses to the survey statement "I feel I am a part of a team" increased from 53% in 2006 to 90% in 2010.
- **Succession planning and re-careering**
 - » As a direct result of coaching, nurses have returned to school; one received a prestigious award; another had an article published in a medical journal; several applied for advanced positions; and one joined her local Chamber of Commerce to gain leadership experience in her community.

Armed with feedback from the coach and input from its Senior Nurse Advisory Council, the HR department is focused on offering additional resources to support older and experienced nurses. For example, the hospital recently held an education fair inviting admissions staff from various colleges and universities to share information about degree requirements for roles in the health care industry. The department is also working with managers to develop their coaching skills.

There will be a tipping point where the economy improves and people will decide not to work or will leave to work somewhere else. For now, the shift is from early retirement to phased retirement. Employees aren't talking about full retirement at 62. They want to stay on the job as long as they can contribute and have flexibility in scheduling and position. Our challenge going forward will be how to manage this and at the same time keep employees engaged and working in healthcare.

~ Karen Hill, Chief Operating Officer/Chief Nursing Officer,
Central Baptist Hospital

MOVING FORWARD

With an increased awareness of the value of career coaching, CBH plans to expand the program to involve additional participants from the nursing staff. Following the success of engaging a retired nurse as a coach, CBH has offered a variety of positions to other retired nurses and is considering creating additional temporary positions for those delaying retirement. One retired nurse who spends summers in Kentucky was tapped to perform presurgical physicals during those months. Another retiree fills in for a nurse manager who was deployed to Iraq.

ORGANIZATION INFORMATION

Company description	This leading lodging company has more than 3,700 properties in 73 countries and territories.
Type of organization	For-profit, hospitality
Corporate headquarters	Bethesda, Maryland
US workforce	100,400 associates 84% are hourly workers
Average age of US workforce	41 years
Web site	www.marriott.com

INNOVATIVE PRACTICE AT A GLANCE

Name of initiative	Hourly flexibility
Description	Innovative options for scheduling, career, and work design flexibility
Target population	Hourly workers, including those 50 and older

FLEXIBILITY STRATEGY

At a high level, we make a variety of flexible work options available. We provide the tools and enable managers to determine what works best for their teams, keeping all options open. We encourage associates to ask questions. What is the work you do? What are customers like? Are there certain hours you need to be physically present? What innovative solutions could work? Then we share ideas with teams and pilot creative approaches that focus on results for our customers while supporting associates' personal and professional goals.

~ Betsy Kiss, Senior Director, Workplace Strategies

Marriott says that since its founding in 1927, some fundamental things have never changed. First and foremost, according to the corporate culture, it puts people first. This is clearly expressed in a quote from Marriott's founder, J. Willard Marriott, which employees today (the company refers to them as associates) easily recite: "If you take good care of your employees, they'll take good care of your customers, and the customers will come back."

Marriott is recognized as a national leader in investing in creative approaches to workplace flexibility and other initiatives that support associates in managing work and life responsibilities. These practices have been recognized by *Fortune* magazine each year since the inception in 1998 of its "100 Best Companies to Work For" list and by *Working Mother* magazine since 1991, when Marriott first made the national "Working Mother 100 Best Companies" list. Marriott was also selected for the inaugural "Best Companies for Hourly Workers" list in 2010 and received this honor again in 2011—notably for best practices in the areas of workplace flexibility, training and development, and supportive benefits for all associates.

While Marriott, like many other organizations, doesn't specifically address "age" in its flexibility strategy, the company does take into account the scheme of generations and the types of flexibility needed at various stages in life and career. Additionally, when new workforce policies or initiatives are being considered, the project manager must consult with a global "Workforce Effectiveness" team in HR about the potential impact on long-term employees.

BUSINESS CASE

Overall, Marriott's workforce is younger than the US population but is aging more rapidly. Mature workers at Marriott are staying on the job well into their 60s, 70s, and even 80s. The business case has less to do with traditional retention than with the links between flexibility and engagement and between engagement and business results. Creating innovative and adaptable approaches to getting the work done ties these two management strands together.

Of Marriott's US workforce, 43% are 45 and older; 18% are 55 and older. Additionally, hourly workers account for 84% of that workforce, with the majority in physically demanding jobs in hotels. For this reason, the company focuses its flexibility policies on hourly workers. Most important to these workers is the ability to obtain a schedule that accommodates their personal lives.

The company's pursuit of flexibility has included a focus on mature workers in these types of jobs. Several years ago, Marriott launched a multiphase aging workforce study to identify issues, develop the business case, create a long-term strategic plan, and implement short-term and proactive solutions. From survey and focus groups with hourly associates age 50 and older, Marriott learned that the vast majority of mature workers were interested in continuing to learn and grow with the company while finding new ways to accomplish their work.

In focus groups, managers expressed interest in exploring new options to address aging in physical jobs such as those in the housekeeping, kitchen, and banquet divisions that require constant movements such as bending, stretching, lifting, pushing, and pulling.

IMPLEMENTATION

In 2011, Marriott introduced new messages about workplace flexibility on its intranet and employee assistance program's site. Marriott's Diversity and Inclusion Councils have included flexibility updates in their quarterly newsletters.

The previous year, Marriott renewed its commitment to the Corporate Voices for Working Families workplace flexibility campaign by signing the 2010 Statement of Support for Expanding Workplace Flexibility. Here is an excerpt:

We therefore commit to provide leadership to:

- *Actively communicate the business imperative for workplace flexibility*
- *Expand flexibility within our own organizations as a tool to advance business results*
- *Support managers in developing and strengthening skills for managing flexibility*
- *Build workplaces in which flexibility is broadly and equitably implemented and available to employees at every level as an integral part of the way work is organized and people are managed.²⁶*

For years, Marriott has offered a traditional portfolio of flexible work arrangements, including flextime, core hours, shift trading, compressed work weeks, reduced work schedules, job sharing and teleworking. At the same time, they focused on flexibility innovations in scheduling, careers, and work design for hourly associates. The following are some options that address needs of mature workers.

- **Cross-training** enables associates to pick up shifts in other functional areas. For older workers, cross-training helps them continue to maximize their hours and develop new skills without completely changing jobs. Additionally, associates in physically demanding jobs such as engineering might cross-train in a job that doesn't require as much heavy lifting.

- **Job rotations** often develop out of cross-training when associates move to another position for a period of time, or a specific number of days a week. For example, a housekeeping associate who works in laundry might cross-train as a lobby attendant and then rotate to that job two days a week, working the other three in laundry.
- **Work process redesign** resulted in a team room-cleaning approach employed at some hotels with various adaptations:
 - » pairing a younger associate with an older associate
 - » dividing time and tasks, such as 10% of the time spent on general cleaning, 20% on messenger and other delivery tasks, and 70% on cleaning rooms
 - » teaming up for a specific task (For example, a team of three might handle turndown service: one straightens the bathroom; one straightens the bedroom; and the other obtains ice and water. Team members proceed in this manner for five rooms and then switch roles, repeating the process for a total of 35 to 40 rooms.)
 - » categorizing tasks according to those that require reaching (such as high, deep cleaning) and those that require bending (such as cleaning under beds)
- **At-home agent** positions for sales and customer care attract hourly workers on both ends of the generational spectrum: younger workers in their early 20s with children and retirees older than 50. At-home agents can bid for a variety of shifts with the flexibility to build in one half-hour increment so they can step away from the phone. They can also call in and request a block of one to three hours off, with the option of making up the time later in the week.
- **Flex coupons** available to associates in Marriott's reservations centers enable staff to log into an automated system and sign up for time off, in one- to three-hour increments, a half day, or a full day, either on the "day of" or for a future date.
- **Down time without pay** is offered to staff in reservations centers during slower times in the form of extended breaks, shorter shifts, leaving early, or extra days off. This option is also informally offered to hotel staff during slower periods.



CHALLENGES

Marriott hotels are open for business around the clock, every day of the year. Guest satisfaction is paramount and most of the interactions associates have with guests are face-to-face. Flexibility for mature workers challenges the corporation to find ways to help this segment of the staff be productive and continue to have opportunities for learning and development as they age.

OUTCOMES

In 2011, Marriott added a question about satisfaction with workplace flexibility to its annual associate engagement survey. More than 90% of the US workforce completed the survey, and the majority responded that they have the workplace flexibility they need. Overall responses to the survey, and those from associates aged 55 and older, were above the external vendor's best employer benchmarks.

MOVING FORWARD

Marriott plans to pursue workplace flexibility with the following strategies:

- developing new communications to encourage innovative options for hourly worker scheduling flexibility
- soliciting and communicating flexibility success stories
- providing additional tools to help managers understand, innovate, and implement a broad range of scheduling and career flexibility options
- launching the next phase of their Aging Workforce Project, which focuses on a wide range of initiatives including manager and associate awareness of aging workforce issues, health and wellness programs, and workplace flexibility communications

Case Study: MITRE

ORGANIZATION INFORMATION

Company description	This organization engages in scientific and technical activities and manages federally funded research and development centers for the US Department of Defense, Federal Aviation Administration, Internal Revenue Service, Department of Veterans Affairs, and Department of Homeland Security.
Type of organization	Nonprofit research center
Corporate office locations	Bedford, Massachusetts; McLean, Virginia; 60 international sites
Workforce	7,000 scientists, engineers, and support specialists, 65% of whom have MA or PhD degrees
Average age of workforce	47 years
Web site	www.mitre.org

INNOVATIVE PRACTICE AT A GLANCE

Name of initiatives	<ul style="list-style-type: none">• Phased retirement• Part-time on-call
Description	Flexible options to transition into retirement
Target population	Employees age 50 and older
Launch date	<ul style="list-style-type: none">• Phased retirement: early 1980s• Part-time on-call with a focus on mature workers: 2001

FLEXIBILITY STRATEGY

We view flexibility at MITRE as an enabler of getting work done in the most efficient manner while remaining focused on our collaborative culture. Ten years ago, managers wanted the majority of people working the same schedule from the MITRE location, believing that was the only way to facilitate collaboration and a learning environment. Today, with social media and other collaborative tools, we work a variety of flexible work arrangements and employees determine by project what works best for them and their sponsors.²⁷

~ William Albright, Director,
Quality of Work Life and Diversity, MITRE

One of the MITRE Corporation's core values—"people in partnership"—identifies the "shared responsibility for growth, partnership with the government, collaboration within and without, and the ability to maintain a balanced lifestyle."²⁸ MITRE uses flexible work options to help employees serve customers without sacrificing balance in their lives.

Although the organization does not directly identify age as a component of its flexibility strategy, it uses a life-cycle approach to talent management and benefit design to meet employees' needs throughout all career stages.

BUSINESS CASE

More than 50 years ago, MITRE was founded as a nonprofit organization to create engineering and technical services for federal government agencies, such as the Department of Defense, the Federal Aviation Administration, and the Internal Revenue Service. Employees work in partnership with the government on projects of critical national importance that require a high level of knowledge of systems engineering and information technology.

Government project leaders come and go. The role of MITRE is to provide continuity in technical expertise and institutional knowledge for specialized, complex projects. For example, according to William Albright, from its inception MITRE has collaborated with the US Department of Defense to create joint command, control, and communications systems.²⁹

By the late 1990s, MITRE's annual turnover had grown to 12% due to the lure of the dot-coms, a growing demand for experienced information technology specialists, and a business spin-off at the company that shook employees' trust. Employee satisfaction and engagement levels in response to surveys fell and requests for greater flexibility were frequent. Retention had become a major issue for MITRE.

In response, MITRE aggressively focused on shifting its culture to become more people-focused, breaking down departmental silos and sharing knowledge across the company more readily. A new Quality of Work Life division in HR was created to focus on people initiatives, learning and development, and creative flexibility strategies to retain experienced workers and their valuable knowledge and critical thinking skills.

IMPLEMENTATION

For all employees, MITRE now offers a variety of commonplace flexible work arrangements, such as flextime, reduced hours/part-time schedules, job sharing, compressed workweeks, and telecommuting. Flexibility has become the foundation of the company's work-life initiatives, an integral part of the culture, and the way work gets done.

MITRE has inculcated in its employees and managers the value of workplace flexibility regardless of life stage. For mature workers, unique aspects of flexibility are a phased retirement program and "part-time on-call" (PTOC), formerly known as "Reserves at the Ready." Mature workers with more than 20 years of technical experience represent the majority of MITRE's workforce. The average age of the workforce is 47. MITRE's retirement plan, company match of employee retirement contributions, and other benefits such as the aforementioned phased retirement option were all purposefully designed to retain experience and intellectual capital.

Phased retirement program

Since the early 1980s, MITRE has offered a phased retirement for regular full-time and part-time employees who wish to transition to full retirement slowly. When MITRE launched the program, it was not part of a business strategy; instead, it was a direct response to employee requests. With a defined contribution plan, the company could offer it. Over the past 10 to 15 years as flexible work has become part of the culture, phased retirement has evolved from a "program" to one of many flexibility options for mature workers.

Participation is determined on a case-by-case basis and is dependent on staffing levels. Employees must be at least 59 1/2 years old with a minimum of 10 years of service to be accepted into the program. They may work regular part-time status (20 or more hours per week, but no more than 32) or part-time on-call status (generally fewer than 20 hours per week). Employees may collect partial benefits from the MITRE retirement plan and continue to contribute to the retirement program and receive the organization's matching contributions. They may also participate in other benefits.

The purpose of phased retirement is to enable employees to slowly transition to retirement, while having access to some of the Retirement Program benefits to meet financial needs. Typically, employees stay in phased retirement for three to four years and then make the decision to return to work full-time (if their situation has changed) or to begin full retirement.

Reserves (part-time on-call)

Designed in 2001 and initially branded "Reserves at the Ready," MITRE's part-time on-call (PTOC) option is an innovative way to retain institutional knowledge and enable older workers to stay active in the workforce. Participants in PTOC provide short-term project support for complex and highly specialized projects; administrative positions are also available. Through PTOC, mature workers have an opportunity to mentor younger employees and share technical expertise and in-depth knowledge of government agencies and specific projects.

MITRE now considers all of its PTOC employees as "Reserves," including current employees with specialized expertise and experience who prefer to work part-time providing short-term project support for complex and highly specialized projects. PTOC positions are also available to those with experience in administration. For retirees, PTOC is an option in addition to phased retirement to scale back their careers while continuing to contribute expertise. Reserves who are retirees are compensated at a salary rate equivalent to their former pay and are restricted from working more than 1,000 hours in a calendar year. Participants are not benefits eligible; however, MITRE provides retiree medical, subsidizing 50% of the insurance premiums for reserves who are between the ages of 58 and 65. While participating in PTOC, retirees are eligible to withdraw from their retirement plan accumulations.

Originally, the Reserves at the Ready program was a corporate resource managed centrally by HR. There was one pool of participants and an online searchable database housed their

resumes. Over time, HR realized that retirees in the pool were being used primarily by their previous departments. It made more sense to decentralize, enabling each department to create and maintain its own retiree pool and work with participants independently to determine appropriate assignments and schedules. With complex employee database systems already in place, MITRE managers could still locate any participating retiree to tap into specific expertise. With this administrative change, MITRE began to downplay Reserves at the Ready as a formal program for retirees. The organization now considers all of its PTOC employees as “reserves,” including younger employees who prefer to work part-time on technical projects or in administrative roles. Of the 216 PTOC participants in 2011, 71 are younger than 55, 145 are 55 or older, and 94 are retirees.

CHALLENGES

In 2001, when MITRE launched formal guidelines for flexible work arrangements, HR had buy-in from senior leadership; however, among managers there was some concern about trust and losing control. To address these concerns, HR put in place a variety of supportive resources:

- broad and transparent communication of all flexible options
- online access to employee and manager guides to flexible work arrangements
- training of employees and managers on how to create a more flexible workplace culture
- changes in HR information systems to facilitate flexible scheduling
- consistent messages to reinforce the need to manage people differently and find the best ways to accomplish work

Following the implementation of flexibility in this manner, MITRE's employee survey ratings for engagement and trust rose significantly. While HR administrators couldn't prove that flexibility was the tipping point, they knew anecdotally that employees felt they had more autonomy and trust from the organization, leading to a greater ability to innovate—a win all around.

OUTCOMES

For years, MITRE has been recognized by prestigious publications and organizations as an employer of choice; turnover runs from 3 to 5%. Among *Fortune* magazine's “100 Best Companies to Work For” in 2011, MITRE ranked third in its support of balance between work and life. Using unsolicited input from employees, Glassdoor.com ranked MITRE second for work/life balance.

William Albright believes these outcomes have a lot to do with the organization's flexible workplace culture. *“MITRE is doing the right thing with flexibility for mature workers. They can continue to be productive, supporting the company's mission and managing work and life,”* Mr. Albright said.³⁰

On MITRE's recent employee engagement survey, work/life balance was one of the top three reasons employees gave to explain why they joined the company and why they stay.

Top three reasons employees join MITRE

- Reputation
- Work/life balance
- Technical challenge

Top three reasons employees stay with MITRE

- Work/life balance
- Retirement program
- Technical challenge

Every day, MITRE employees work with the federal government on projects that demand a high level of expertise, knowledge and focus. The organization's supportive workplace culture enables employees to manage work and life and results in lower stress, greater creativity, and better innovation.

MOVING FORWARD

At MITRE, a huge study of flexibility is under way. This time it's not about resources and tools for employees and managers; those are in place. Now the focus is on studying company space. How can space be used more efficiently? How can employees be more agile and mobile? How can MITRE better incorporate social media and collaboration, taking flexibility and the way work gets accomplished many steps further?

CONCLUSION & RECOMMENDATIONS

Employees in all stages of life and career desire workplace flexibility. The Sloan Center's "Age & Generations Study" found that flexibility contributes to the building of a healthy and effective workplace. For older workers—indeed, for employees in all age groups—having access to flexibility is predictive of greater employee engagement, less stress related to perceptions of work overload, better physical and mental health, and greater satisfaction with work/family balance.³¹ However, for maximum impact, flexibility must be the right fit for each employee. To accomplish this for older workers, the employers featured in this report offer a variety of options to customize when and where work is accomplished and how careers are organized.

This exploration suggests the following recommendations for other employers:

- Address the issues that impact flexibility fit:
 - » broad access to a variety of workplace flexibility options
 - » supervisor support for workplace flexibility
 - » work team support for workplace flexibility
 - » positive culture on the job surrounding work life and family/personal life
 - » usability of available workplace flexibility options³²
- Conduct internal research to understand the specific demographics and retirement patterns of the organization's workforce.
- Assess the flexibility and career needs of older workers through surveys, focus groups, and interviews with employees and managers.
- Create a multidisciplinary task force, including older workers, to focus on the needs of an aging workforce in the areas of flexibility.
- Evaluate how the organization might use flexibility to recruit older workers, engage retirees as mentors, fill part-time or seasonal positions, or provide specialized expertise.
- Develop and communicate a broad range of schedule, workplace and career flexibility options for hourly and salaried workers.
- Offer skill development to help managers and HR professionals create a more flexible workplace culture and effectively lead older workers.

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ABOUT THE SLOAN CENTER ON AGING & WORK

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

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

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

Contact us:

The Sloan Center on Aging & Work
140 Commonwealth Avenue
3 Lake Street Building
Chestnut Hill, MA 02467
Phone: 617.552.9195 • Fax: 617.552.9202
agework@bc.edu

Project Team

Author:

Linda Roundtree is founder and president of Roundtree Consulting. She partners with organizations to design, implement, and communicate work-life initiatives and complete applications for “best company” lists. Linda has written numerous toolkits, journal articles, and published papers, including the Sloan Center on Aging & Work’s 2010 practitioner report, *Age: A 21st Century Diversity Imperative*. Linda is a faculty member with WorldatWork. She has served as president of the boards of Alliance for Work-Life Progress (AWLP) and Child Care Resources and continues to be actively involved with both organizations.

Sloan Center on Aging & Work Staff Contributors:

Samantha Greenfield is an Employer Engagement Specialist at the Sloan Center on Aging & Work. In her role, Sam connects employers around the world with the center on research based projects. Her past experience includes managing human resource departments at two large Boston law firms.