

Organizational Benefits of Retaining
Older Workers

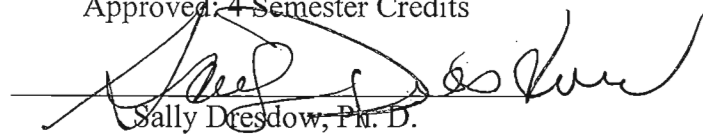
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Abstract

This study analyzes how opportunities for training may influence the retention of older employees beyond traditional retirement age. Baby boomers statistically represent the largest, healthiest, and longest living generation in American to date and their impending retirement is predicted to create the largest labor shortage in economic history. As a result, organizations need to retain the employment of older workers more effectively, which requires retention strategies to accommodate the employment needs of baby boomers. The literature review examined retention strategies best suited for older employees while retaining its focus on how training may influence the retention of older employee. Data was collected with a Qualtrics questionnaire designed by the researcher. The 17-question survey was designed to store and analyze the data collected from a convenience sample of 60 baby boomers currently employed in Wisconsin. The results of the survey were reported. Additional research needs to be conducted by refining the training variables and using a larger and more geographically diverse sample population on which statistical tests can be performed.

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Chapter I: Introduction

Members of the baby boomer generation have already begun to retire. This group includes 75 million people and as the process continues, organizations will eventually experience major labor shortages (Brandel, 2006; Employee Retention Strategies, So What's A Boomer Anyhow, 2010). The drop in birth rates after the baby boomer generation shows there are fewer younger workers (age 20-39) available to backfill positions that will be left vacant by retiring adults. Population statistics show that younger generations significantly lack the necessary numbers of people needed to adequately replace the 40% of the current workforce filled by baby boomers (Stanley, 2006).

A labor shortage makes the retention of baby boomers beyond the traditional retirement age important. Different types of retention strategies have been shown to be effective when targeting older employees versus younger employees (Colelli & Douglas, 2004). Strategies focused on retaining older workers include the areas of recognition, job flexibility, and training (Amble, 2006; Eyster, Johnson, & Toder, 2008; McIntosh, 2001). Successfully retaining current employees will allow organizations to decrease the impact of the impending labor shortage (Eyster, et al., 2008).

Statement of the Problem

The 75 million baby boomers reaching full retirement age will create the largest potential labor shortage in American economic history. To survive, organizations will need to develop successful strategies focused on addressing the needs of older employees (between 45 to 65 years of age) to retain the baby boomers past the traditional retirement age.

Purpose of the Project

This study specifically seeks to determine how the retention strategy of providing training opportunities, affects the intention of older employees to work beyond the normal retirement age.

The purpose is broken down into three research objectives:

1. Acquiring data and analyzing the benefits of training as perceived by older employees.
2. Acquiring data and analyzing the benefits of continuing employment as perceived by older workers.
3. Investigating the extent to which training could potentially affect the retention of workers beyond retirement age.

Assumptions

Assumptions of the proposal are listed below:

1. The baby boomer generation is the largest group of older workers simultaneously approaching retirement age.
2. Baby boomers are defined by age.
3. Medical advancements and healthy life style choices have resulted in people living longer and choosing to work longer.
4. Employment priorities differ among older and younger workers.
5. The people surveyed have provided honest and accurate information.

Definition of Terms

Baby boomer generation. Term used to identify the surge in births after World War II; for this study, it is people born from 1946 through 1964.

Employee retention strategies. This refers to policies and procedures that organizations utilize to delay or prevent employees from leaving their jobs.

Generation X. A term used to identify the people that were born between 1965 through 1980.

Older worker. A term used to label employees between 45 and 65 years of age who also falls within the baby boomer generation definition.

Prolonged employment. A term that represents a period of time when an employee qualifies for retirement yet chooses to continue working.

Retirement age. This study assumes 66 to be the general retirement age. This corresponds to the age when most workers currently qualify for full Social Security retirement benefits.

Training. A word that identifies continuing education used to enhance ones skills and knowledge pertinent to individual job responsibilities.

Young worker. A term used to describe an employee between the age of 20 and 39.

Methodology

This research identifies the benefits of training and its potential effectiveness in retaining older workers. Chapter 2 presents literature that highlights the impending labor shortage, identifies employee retention issues and summarizes the likely benefits of training. Chapter 3 identifies procedures involved in data collection, providing detailed description of the data collection tools, and describes the sample group, and the methods utilized. Chapter 4 outlines results from analyzing the study. Lastly, chapter 5 concludes the study and provides recommendations.

Chapter II: Literature Review

Research cited in this chapter describes how organizations benefit from retaining older workers. The literature review explores the organizational benefits of retaining older workers and literature on identifying skill recognition, job flexibility, and training as pertinent retention strategies for employees of age is included (Boomer Authority, 2009; Yazinski, 2009). Research indicates that the act of accommodating the employment needs of older employees is critical for delaying retirement (Yazinski, 2009). For that reason, the information in this chapter analyzes employer (organizational) benefits in relation to retention strategies. Note the nature of employee “preservation” strategies unintentionally encompasses advantages for both employers and employees.

Organizational Benefits of Retaining Older Workers

Retaining older workers allows organizations to benefit from a lifetime of accumulated skills, experience, loyalty, and training (Boomer Authority, 2009; Performance Agents, 2006). Eisen (2005) emphasizes the need for employers to value baby boomers by designing retention strategies that accommodate the needs of older employees. Older workers exhibit a pattern of highly qualified, efficient, and industrious resources and heightened levels of knowledge, skill, and maturity (Colelli & Douglas, 2004). Consequently, it is cost effective for organizations to capitalize on existing abilities and qualities, perfected over years; representing an advantage to older employees when compared to younger, less experienced employees (Eisen, 2005). Evidence (grouping employees by training experience and skill levels rather than age) supports the conclusion that organizations consistently benefit from retaining personnel possessing the broad skill base and expertise, most often associated with older employees (Colelli & Douglas,

2004). The benefits of retaining baby boomers are expressed below in terms of job skill, loyalty, and training.

Job skills. Organizations that retain older workers benefit from prolonged access to their superior skills and knowledge that has been accumulated over decades of employment. Smith (2008) states the majority of skilled and/or senior organizational positions continue to remain occupied by baby boomers. Furthermore, organizations suffer financial losses when individuals with specialized skill sets and key resources leave (Eyster, et al., 2008). For example, research conducted on the staff at the University of California estimates the cost to replace accumulated knowledge (highly skilled professionals, executives, and technicians) lost to the retirement of 1/3 of its current workforce (10 million positions) over the next 10 years to total \$525 million (Agrela, Carr, Veyra, Dunn, Ellis, Gandolfi, Gresham, King, Sims, & Troutman, 2008). Research from Boomer Authority (2009) reveals that the replacement cost of a full-time employee (private sector), loosely equates to 25% of the current employees salary, which excludes unquantifiable costs (experience, specialized knowledge). In short, employees develop more refined and valued skill sets the longer individuals remains working for the same employer (Eyster, et al., 2008).

The United States Department of Labor (2009) states 50% of all employers rank having knowledge of work ethics as the second most valuable skill necessary to perform a job, with basic job skills ranking number one. Consequently, statistics support that 80% of all unemployment is due to poor work ethics, not skill inadequacy (United States Department of Labor, 2009). A variety of sources support the finding that the baby boomer generation is associated with embodying strong work ethics and company loyalty, resulting in a higher return on investment over time (Colelli & Douglas, 2004; Eisen, 2005; Stanley, 2006).

Experience. A combination of advanced skills and ongoing work experiences of baby boomers increases the organizational benefits associated with retaining older workers. Stanley (2006) reports that surviving the predicted labor shortage depends upon the effectiveness of an organizations retention policy. Additionally, the affects of a massive labor shortage limiting the available number of skilled and experienced resources severely weakens specialized industries/occupations that require advanced capabilities (i.e. computer intelligence, technical expertise, or corporate management knowledge) (Stanley, 2006). Performance Agents (2006) state that five out of the ten fastest growing jobs are in the Information Technology (IT) field with high demand for older employees to fill positions requiring mission critical experience, domain knowledge, and outdated legacy programming abilities. Eisen (2005) states that skill shortages are becoming a national trend, currently affecting 80% of the manufacturing industry. Evidence supports that American industries currently facing labor shortages are encountering gaps in skill levels and suffer reduced productivity because of unqualified workers (Eisen, 2005). This is one factor, which prevents American businesses from competing globally.

Retention. Retention tactics that adjust to accommodate the changing needs of older employees provide greater organizational benefits. Eisen (2005) analyzes non-traditional recruitment strategies that have resulted in increased retention rates of employees with valuable skills/knowledge. As a result, employers that exploit organizational training and development programs, as a marketing tool, is an effective strategy for recruiting and retaining limited resources when used randomly on a small population (Eisen, 2005). However, the misuse of this kind of retention strategy on a large, international scale would deplete the available (global) resource pool of all skill sets associated with a particular profession (Colelli & Douglas, 2004; Eisen, 2005). Thus, organizations have the option of utilizing unconventional retention

strategies to preserve advanced levels of skills and knowledge in older employees (Prenda & Stahl, 2001).

Loyalty. Companies that prolong the employment of older workers unconsciously enhance individual feelings of company loyalty as well as provide organizational benefits (Dwyer, 2008; (Prenda & Stahl, 2001). Colelli & Douglas (2004) characterize the baby boomer generation as being the most loyal and dedicated cohort in America. Additionally, statistics support that older workers remain with the same employer an average of 15 years longer than younger workers (averaging less than 4 years of uninterrupted service) (Colelli & Douglas, 2004). Additionally, McIntosh (2001) statistically identifies the baby boomer generation with a 77% higher “company loyalty” rating when compared against younger generations (based on years of service). Furthermore, evidence supports that by increasing the numbers of baby boomers who intentionally delay retirement is associated with committed employers that support a positive work environment instilling individual respect, commitment, excellence, teamwork, and training (Yazinski, 2009). Studies indicate that the workaholic mentality of baby boomers, which advocates personal qualities of self-sacrifice, diligence, and devotion, is associated with higher job performance levels that sustain company success (Salopek, 2000; Smith, 2008). Additionally, Colelli & Douglas (2004) point out that the innate, emotional need in baby boomers to develop a strong, personal relationship with their work life also unconsciously reinforces company loyalty. Thus, older workers that perceive “work” (individual vocational choices) as a significant part of their personal identity is associated with greater company loyalty enhancing skill levels, job performance, productivity, and retention of baby boomers (Smith, 2008).

Costs. Research shows that the increased loyalty and work ethics of older workers relates to reduced organizational costs related to reductions in absenteeism (66%), turnover (76%) (Colelli & Douglas, 2004; Dwyer, 2008; Gale Group, 2006). Survey results posted by the United States Department of Labor (2009) indicate that employers are more willing to spend additional money to retain and train employees that exhibit qualities of loyalty, honesty, dedication, fortitude, and solidarity. Statistics support that the costs to train older workers being equivalent to those of younger workers is associated with longer employment durations of older employees (averaging 15 years) than younger employees (averaging 6.6 years), which allow individual skills/knowledge to become more refined and specialized over time (Colelli & Douglas, 2004; Eyster, et al., 2008; Workforce Planning, 2000).

Furthermore, evidence indicates that deeper feelings of loyalty linked to older workers compensates for any additional expenses incurred in the retention of baby boomers while limiting costs of recruiting, hiring, and orientating new employees (Colelli & Douglas, 2004). The estimated cost to replace an average employee is equivalent to one-third of the existing salary (ranging between \$3,700 (minimum wage) and \$13,996 (private sector)) while the cost of replacing older employees increases to 50% of the an existing salary due to advanced skill levels acquired with age (Employee Retention Strategies, n.d.). The organizational benefits for training older workers correlate with reduced financial spending on turnover, recruitment, orientation, productivity, training, re-training, and retention costs in older workers (Buckle, 2008). In conclusion, statistics indicate that greater levels of company loyalty are associated with prolonged employment beyond normal retirement age (Agrela, et al., 2008). Thus, retention factors that effectively retain older workers not only encourage company loyalty; but also comes

full circle to allow organizations to capitalize on the loyalty of baby boomers to retain skills/knowledge by extending careers (Boomer Authority, 2009).

Training. Retaining older employees preserves valuable training knowledge that benefits organizations. Marmer (1995) states that maintaining a longer duration of employment is critical for enhancing individual job performance (skill and knowledge). Further studies indicate that lengthier employment durations provide older workers the advantage of having accumulated more years of training knowledge and experience (skill and knowledge) thus, surpassing skill levels of younger, less experienced workers (Segrist, 2007; Colelli & Douglas, 2004). Additionally, delaying retirement in older workers sustains valuable training experience (skill and knowledge) that reduces organizational errors, accidents, turnover, and inefficiency (Buckle, 2008; U.S. Accountability Office, 2008).

Skills and knowledge. Segrist (2007) reveals the relationship between organizational success (increased financial profits and demands for product/service) and the retention of highly skilled employees sustaining organizational growth. Furthermore, employees possessing advanced skills and company-wide knowledge are better positioned to foresee and avert potential business crises due to possessing greater corporate management knowledge that increases over time (U.S. Accountability Office, 2008).

Productivity. McIntosh indicates that enhancing job productivity in older employees is related directly to stimulated mental training capabilities and not to age, which is known to limit physical abilities over time (McIntosh, 2001). Further data indicates that regular training enhances job confidence and commitment levels related to decreased numbers in reported absenteeism, sick time and injuries (Prenda & Stahl, 2001). Further evidence supports routine

job training sustains productivity in older workers (Berryman & Vaughan, 1989; Prenda & Stahl, 2001).

Turnover. Colelli & Douglas (2004) state that regular job training is proven to effectively reduce turnover rates in older employees. Marmer (1995) reports that attending a minimum of one training session per year can reduce turnover in older workers by 30%, which is estimated to average \$15,000 per employee, which includes separation costs, paperwork, unemployment, and replacement costs. Furthermore, Colelli & Douglas (2004) verify that the average turnover rate of workers between age 50 and 59 is 33% less than that of employees under the age of 36; and employees over the age of 60 represent 16.6% of all company turnover. One study described how a hospital maintaining 3,000 workers with an average salary of \$45,000 could save over \$1.3 million annually with only a 1% reduction in turnover (Employee Retention Strategies, n.d.). Additionally, companies unmotivated or unable to retain older workers overlook the unquantifiable affects of lost skills, expertise, and corporate knowledge to retirement of baby boomers (Colelli & Douglas, 2004). Evidence supports that costs related to replacing older workers lost to turnover (averaging 14.4% annually) requires a significant portion of an organizations annual operational budget (Employee Retention Strategies, n.d.).

Colelli & Douglas (2004) state that organizations successfully retaining baby boomers can capitalize years of individually accumulated work ethics, training, skills, and expertise. Retaining older employees allows companies to utilize extensive skills and knowledge to quickly adapt to changing conditions, technologies, and resource demands (i.e. labor shortage) (Brandel, 2006).

Retention Factors for all Employees

Evidence indicates that organizations benefit from the retention of existing employees (Eyster, et al., 2008). Agrela, et al (2008) state the need for effective retention factors to focus on organizational growth and success. Statistics support retention strategies that effectively satisfy the needs of all employees consequently enhance the ability for companies to adapt more effectively to ongoing organizational change (related to restructuring, industry standards, product demand, resource allocation, and technologies) (Dwyer, 2008; Gale Group, 2006). Research shows that trends redefining modern retention strategies go beyond the traditional salary and benefits package to embrace the diversity of the 21st century work force (Gale Group, 2006). Retention factors incorporating the needs and desires of employees at any age enhance levels of individual job satisfaction, loyalty, and commitment (Boomer Authority, 2009; Scheef & Thielfodt, 2004). Cunningham (2002) states that employees rank employee recognition, flexibility and training as top priorities for prolonging individual employment. The following section explores how retention factors of job recognition, flexibility and training effectively benefit workers of all ages.

Skill recognition. Providing skill recognition of personal job accomplishments is an effective retention strategy for employees at any age (Yazinski, 2009). Studies indicate fulfilling peoples need for acceptance by acknowledging individual work accomplishments prolongs employment of employees of all age groups (Redington, 2007; Yazinski, 2009). Studies by Cunningham (2002) and Yazinski (2009) show trends of an increased number of job applicants seeking out companies that encourage employee input, growth, education, and teamwork, beyond the traditional compensation/benefit packages offered by employers. One recent study also supports that “recognition” out-ranks “money” (by 55%) as being the primary motivation of

employment across all age groups (Redington, 2007). The Gale Group (2006) states organizational benefits of personal recognition are priceless, yet statistics support that the impact of verbal praise has the ability to enhance company loyalty, motivation, and perseverance at no extra charge. Individual skill recognition is unrestricted by age, and motivates positive behavior, ethics, teamwork, confidence, and growth in all employees (Cunningham, 2002; Redington, 2007). Thus, both skill recognition (ranging from verbal praise to incentives/rewards) and learning opportunities (growth/development) enhance individual performance, effectiveness, and retention (Agrela, et al., 2008; Yazinski, 2009).

Studies indicate that “free” verbal recognition may be the only reward companies can afford during economic downturns, yet simple sincerity and validation not only inspire, but more importantly sustain prolonged loyalty, efficiency, productivity, teamwork, and employee retention (Redington, 2007; United States Department of Labor, 2009). Research shows a variety of job recognition techniques that greatly range in costs, formality, and creativeness (Agrela, et al., 2008; Redington, 2007). Note however that the focus of employee recognition is not always on the tangible aspects it provides (i.e. awards, certificates, trinkets, prosperity), but rather the vital nature of its presence (Cunningham, 2002; Leanard, 2001).

Job flexibility. Job flexibility is vital for retaining employees of any age (Boomer Authority, 2009). Researchers describe the importance of employment flexibility such as scheduling variations that better accommodate individual work times, workloads, responsibilities, and locations around family responsibilities (Cunningham, 2002; Pleffer, 2007). Studies show that “flexibility” empowers individuals to facilitate a healthier balance between work and personal obligations, something that appeals to all ages of employees (Eyster, et al., 2008; Scheef & Thielfodt, 2004). Prenda & Stahl (2001) say that employees having job

flexibility options report having higher levels of individual commitment, concentration, satisfaction, productivity, loyalty, and mental capacity at any age.

Career and life options. Eyster, et al. (2008) state that job flexibility along with embracing career and life options, is a critical incentive for all employees, regardless of age disparity. Research shows growing trends of employers providing greater job flexibility that includes flexible career options (i.e. training, mentoring, workstation accommodations, job mobility, and reduced work hours) and life options (i.e. counseling services, health and wellness programs) (Boomer Authority, 2009; Eyster, et al., 2008).

Cost effectiveness. Studies support the conclusion that organizations providing cost-effective job flexibility options benefit from satisfying the needs of all employees, independent of age, which allows for the reallocation of expenses related to recruitment, work space changes, sick time, absenteeism, and commuting costs (Agrela, et al., 2008; Boomer Authority, 2009; Cunningham, 2002). Consequently, studies indicate that there is a link between cost-effective “flexibility” choices and advanced levels of job satisfaction, accuracy, productivity, recruitment, and employee retention (Boomer Authority, 2009; Cunningham, 2002; (Prenda & Stahl, 2001). Eyster, et al (2008) state organizations can cost-effectively fulfill the needs for job flexibility options to promote employee retention. Thus, the provision of cost-effective “flexibility” options is critical in the retention of all employees despite disparity in age, position, skill/knowledge level, and duration of employment (Eyster, et al., 2008; McIntosh, 2001).

Training. Training is a key retention factor for employees at any age. Statistical evidence indicates job training is a critical factor for personal (behavioral) and professional (technical) development; regardless of profession, rank, or age (United States Department of Labor, 2009). The availability for all employees having access to training and development

programs is critical in facilitating organizational growth, particularly with performance and technological improvements (Boomer Authority, 2009). Research supports that both the organizational benefits and cost savings associated with training programs outweigh the initial cost it incurs (Prenda & Stahl, 2001).

Eisen (2005) states that training programs available to all employees correlate with a 70% increase in employee retention rates. Furthermore, employees remaining current on new technologies and best practices provide organizational benefits beyond employee retention shown to optimize individual levels of efficiency/productivity up to 230% (Eisen, 2005).

Benefits. Evidence supports the conclusion that access to regular training programs enhances growth, prosperity, and retention for both employees and employers (Amble, 2006). Research provided by Berryman & Vaughan (1989) and McIntosh (2001) indicate a relationship between enhanced training foundations (competencies, efficiencies, and intelligence) and advanced development of best practices, cross training, mentoring, and technology changes for all employees. Training benefits (tangible or intangible) correlate with higher levels of consistency, competency, productivity, adaptability, independence, and loyalty in employees at any age (Agrela, et al., 2008; Boomer Authority, 2009; Yazinski, 2009).

Methods. Research indicates training methods that engage workers with career challenges, advancement opportunities, work incentives, competitive wages/benefits, and supportive work environments are effective retention strategies for employees of any age (Eisen, 2005). Additionally, evidence supports that teaching methods accommodating the educational needs of students relates to advanced levels of knowledge and information retention (Eisen, 2005). Berryman & Vaughan (1989) state that training techniques facilitating various learning

needs associates with enhanced levels of morale, job satisfaction, motivation, innovation, skill, productivity, and employee retention.

In conclusion, retention strategies accommodating the needs of employees at any age prove highly effective in prolonging employment. Consequently, job recognition, flexibility, and training are key factors in the preservation of an organizations most valuable asset - employees (Yazinski, 2009).

How Retention Factors Apply to Older Workers

Research indicates retention strategies satisfying the primary emotional, physical, and educational needs of 45 to 65 year old employees correlate with the retention of older workers beyond normal retirement age (Gale Group, 2006; Yazinski, 2009). Yazinski (2009) states highly effective retention strategies satisfying the educational needs of older employees associate to increased durations and quality of employment of older workers. Further statistics show additional opportunities engaging participation of older workers in social, reward and recognition, and training/development events associate to reduced sick time, absenteeism, and turnover of older employees (Eisen, 2005). Thus, evidence supports a growing demand for organizations to develop a new paradigm that sustains employment beyond normal retirement age by utilizing retention strategies focused on skill recognition, job flexibility, and training in older employees (Amble, 2006; McIntosh, 2001).

Skill recognition for older workers. Statistics support highly effective skill recognition strategies accommodating employment needs of older staff members relates to validating the need for frequent and constructive affirmations in older workers (Eisen, 2005; Yazinski, 2009). Colelli & Douglas (2004) state the workaholic mentality baby boomers enhance individual feelings of great pride associated to the skills and knowledge acquired throughout ones lifetime.

Further studies show lengthening ones employment career enhances skill (ability, agility, magnitude, expertise, and adaptability) relates to greater numbers of older workers acquiring key management positions, extensive corporate management knowledge (Boomer Authority, 2009; Dwyer, 2008). Eyster, et al (2008) discuss extensive organizational losses (financial, resources, skill) associated with companies that overlook the potential of retaining employment of older workers. Thus, research supports that individual recognition and acknowledgement of achievements in baby boomers relate to sustained employment beyond retirement age (Redington, 2007).

Retention. Scheef & Thielodt (2004) state baby boomers find great purpose, desire, and fulfillment in self-sacrificing contributions that result in overall organizational success. Further research indicates that older workers thrive on verbal praise, especially from an authority figure (Scheef & Thielodt, 2004). Evidence supports the idea that sincere and timely praise (whether public or private) results in increased loyalty, dedication, and resilience in older workers (Gale Group, 2006). Consequently, evidence indicates that receiving regular, constructive feedback (on job-performance) reduces ones self-doubt and stress, particularly effective for assisting organizational change, process improvements, technology advancements, and retaining employment (Boomer Authority, 2009; McIntosh, 2001).

Forms of recognition. Cunningham (2002) states that baby boomers value recognition in the form of personal praise (verbal and written), monetary compensation, growth opportunities, and conveniences (physical and scheduling). Evidence shows constructive praise that reinforces positive work behaviors in older workers correlates with enhanced feelings of personal value, worth, and respect for efficiently achieving assigned tasks and goals in older workers (United States Department of Labor, 2009). Thus, statistics support the conclusion that respectful forms

of appreciation expressed frequently to older employees correlate with reduced rates of absenteeism and turnover in older workers (Workforce Planning, 2000). Evidence supports that baby boomers seek out job challenges that encourage individual recognition or learning (Dwyer, 2008). Additional statistics support that advanced skill levels in baby boomers are linked to training methods that facilitate learning in older students by utilizing computer technologies, hands-on workshops, cross training, and mentoring techniques (McIntosh, 2001; Yazinski, 2009). McIntosh (2001) states that baby boomers lacking regular, constructive feedback on individual job performance associates with increased feelings of negativity reducing training attendance rates in older employees. Further evidence indicates that the “unwillingness” to learn associated to older adults is due to a lack of organizational support (financial, emotional, opportunity) (McIntosh, 2001). Thus, organizations play a critical role in sustaining motivation, productivity, and employee retention of older workers.

Physical comfort. Organizations that fulfill the physical needs of older workers are utilizing physical ergonomic comforts as a form of skill recognition (United States Department of Labor, 2009). Sergrist (2007) states older workers require a certain level of physical comfort to achieve greater productivity. Furthermore, research supports greater levels of physical comfort in older workers relates to increased utilization of ergonomic tools, accessibility devices, software features, and special work programs (i.e. fitness/wellness, counseling, and referral programs) (Gale Group, 2006; Hung, 2000). Thus, higher levels of physical comfort in baby boomers correlates to improved job efficiency, productivity, safety, and retention of older employees (Salopek, 2000; Yazinski, 2009).

McIntosh (2001) states the benefits of ergonomic equipment in terms of greater physical comfort and productivity in older workers. Evidence shows ergonomics can be as simple as a

minor software adjustment (as a free software program accessory available to all users) to accommodate vision, mobility, and/or language needs associated with the normal aging process (Yazinski, 2009). Other research indicates recognition strategies that satisfy the physical needs of older employees relate to reductions in absenteeism, turnover, and early retirement rates, when compared to younger workers (Boomer Authority, 2009). Thus, statistics indicate accommodating the standard physical needs of older workers cost-effectively prolongs employment of baby boomers beyond normal retirement age (Yazinski, 2009).

Job flexibility for older workers. Colelli & Douglas (2004) state job flexibility as a critical factor in the retention of older employee beyond normal retirement age. Consequently, Yazinski (2009) explains organizational benefits providing flexible work options to older employees relate to improved stress management and extending the careers of retirement age workers. Research indicates rigid work conditions correlate with added emotional stress (balancing work and personal responsibilities), decreased quality of life, and early retirement in older staff members (Eyster, et al., 2008; McIntosh, 2001). Marmer (1995) states that inflexible work schedules relate to increased absenteeism, sick time, accidents, and turnover in older employees. Thus, studies indicate job flexibility (freedom from standard work schedules) as a powerful retention tool, particularly for accommodating the scheduling demands of older workers (Cunningham, 2002; Pimental, 2001).

Forms of flexibility. Although flexible work options appeal to all employees, Eyster, et al (2008) state statistics support increasing demands for additional job flexibility options satisfying the employment needs in older workers allows a better work-life balance. Recent studies indicate greater job flexibility in terms of scheduling, part-time work, work location,

career paths and retirement options in older workers relates to prolonged employment beyond retirement age (Boomer Authority, 2009; Eyster, et al., 2008).

Flexible scheduling. Agrela, et al (2008) states flexible scheduling options adjusting to the time demands placed upon older employees is a critical factor in extended employment beyond normal retirement age. Studies support a connection between a growing need for organizations to retain older employees and additional job-scheduling flexibility that accommodates retention needs of older workers (Boomer Authority, 2009; McIntosh, 2001). Research indicates that higher levels of job satisfaction and productivity in older workers correlates with more flexible job scheduling choices for a healthier work-life balance (i.e. start/end times, reduced work hours) (Agrela, et al., 2008). Consequently, evidence supports a connection between working beyond normal retirement age and the presence of flexible career alternatives that empower older workers the opportunity to negotiate individual working hours; such as working compressed work weeks (working the same amount of hours in fewer days), seasonal, and to engage in contract work (Boomer Authority, 2009).

Part-time work. The Eyster, et al (2008) study indicates increased demand for part-time work relates to older adults unable/unwilling to work 40+ hours per week, yet desiring to receive medical and vacation benefits. Consequently, the nature of part-time employment allows staff more input and flexibility in determining working/non-working hours, which correlates with a achieving a perfect balance between work and personal obligations in older employees (Eyster, et al., 2008).

Flexible work location. Evidence indicates enhanced feelings of appreciation, self-worth, and confidence in older employees with access to various work locations (work from home, travel), hence flexible work locations is a powerful retention tool (Eyster, et al., 2008; Pimental,

2001). Stanley (2006) states working from home one day per week increases positive behavior traits (i.e. job satisfaction, motivation, dependability, and productivity) in older employees. Eyster, et al (2008) points to “snowbird” programs as an example of extreme work location flexibility, which allows staff members to travel between two different seasonal (geographical) locations. Studies indicate a growing demand for snowbird program options that allow for physical and medical needs of older employees seeking warmer climates during winter months and cooler climates during summer (Eyster, et al., 2008; Stillman, 2007).

Flexible career path. Eisen (2005) states increasing demands for flexible career path opportunities that extend careers of older workers. Studies support that there appears to be an association between older workers delaying individual retirement and additional career choices relevant to training, mentoring, and phased retirement options (McIntosh, 2001; Yazinski, 2009). Evidence indicates that organizations providing older employees regular access to cross training and mentoring programs prolong working careers of baby boomers by satisfying ones internal need for ongoing learning and self-improvement (McIntosh, 2001). Consequently, Colelli & Douglas (2004) point out that organizations utilizing cross-generational mentoring as a flexible career option allows older employees to securely transfer critical job knowledge to less experienced, younger employees that could otherwise be lost to retirement.

Flexible retirement options. Evidence indicates retention strategies that postpone retirement in older employees relates to providing relevant retirement options (Eyster, et al., 2008). McIntosh (2001) states that effective retirement programs need to provide options (i.e. reduce work hours, work from home, scheduling options) allowing older workers to facilitate a healthier work-life balance. Research supports the idea that there is a connection between continuing employment beyond retirement age and the need/desire to improve health and

retirement benefits (Boomer Authority, 2009; Performance Agents, 2006). Statistics support that alternative retirement options correlates with a greater number of baby boomers delaying full retirement (Stillman, 2007).

In conclusion, job flexibility options that effectively accommodate the changing employment needs of older workers comprise of an assortment of scheduling, work hour, location, career, and retirement options (Boomer Authority, 2009; Eyster, et al., 2008). Thus, statistics indicate job flexibility as a critical factor for retaining older workers beyond normal retirement age (Segrist, 2007).

Training for older workers. Evidence indicates training is a vital factor in the retention of older employees (DDI, 2009). Consequently, studies indicate training accommodating the educational needs of baby boomers is associated with enhanced skill levels, motivation, productivity, and job satisfaction of older employees (Eyster, et al., 2008; McIntosh, 2001). The United States Department of Labor (2009) states job training that effectively satisfies the learning needs of older employees relates to enhanced employment durations in older employees. Research indicates that training modifications that support the educational needs of workers over 45 years of age enhance information processing (speed and accuracy) and retention in older employees (Cunningham, 2002). Colelli & Douglas (2004) state that training programs structured around adult learning principles result in greater job success and completion rates (training classes) in older workers. The same researchers report that training sessions that adapt the educational needs of 45 to 65 year old workers contributes to more instances of prolonged employment in workers eligible for full retirement (Colelli & Douglas, 2004). The information below explores how training accommodations relate to older employees in relation to educational availability, capabilities, environment, and programs.

Retention. Evidence indicates that longer employment durations in older employees tend to occur when baby boomers acquire advanced skills and expertise over years of continuous employment with the same employer (DDI, 2009; Segrist, 2007). According to Cunningham (2002) continuing training of training older workers correlate with higher retention rates in baby boomers, which demonstrate advanced skills, knowledge, and proficiency (job speed and accuracy). Thus, research shows modified training programs that fulfill the educational needs of older students contribute to prolonging employment of retirement eligible workers (Colelli & Douglas, 2004).

Training availability. Colelli & Douglas (2004) state that unprejudiced access (quantity and frequency) to training initiatives relates to increased levels of skill/knowledge, teamwork, and motivation in older workers. There is also evidence that prejudice against aging workers is related to lack of financial backing for training opportunities of older employees (Colelli & Douglas, 2004). Outdated misconceptions of decreasing abilities in older workers appear to be associated with present day bias of training “inabilities” that limit training opportunities for older employees (United States Department of Labor, 2009). Note, the Federal Age Discrimination in Employment Act of 1967 declares it illegal for organizations to discriminate (exclude) older employees from training opportunities accessible to younger employees (Workforce Planning, 2000). Colelli & Douglas (2004) state that equal access to training opportunities for older workers (age 45 to 65 years of age) is not a corporate privilege, but a legal right.

Training competency. Eisen (2005) states that high competency levels sustained in older workers enhance job satisfaction and performance in baby boomers to prolong careers. Colelli & Douglas (2004) reiterate that the learning levels of older employees relate to individual mental capacity (ability to learn) and not physical age alone. Consequently, statistics support

that accommodating the educational needs of older adults (i.e. accessibility, subject matter, method, and location) associate with a higher mental capacity in older students for the comprehension and retention of new information. Evidence indicate that older workers achieve greater success in customer service positions and that there may be advanced aptitudes in baby boomers for hospitality and customer relations positions (Dwyer, 2008). Colelli & Douglas (2004) state that the idea that labor-intensive positions are associated with decreasing job productivity and accuracy in older workers because the natural aging process reduces physical strength in older adults. Additionally, research indicates a correlation between highly trained competency levels in older workers and advanced proficiency for effectively adapting to new technologies, process improvements, and prolonged employment in older employees (Colelli & Douglas, 2004).

Although research shows both older and younger workers to be competent, capable, and willing to learn, evidence supports that older workers learn “differently” than younger workers (Colelli & Douglas, 2004; McIntosh, 2001). The normal progression of aging corresponds with delayed reactions requiring additional time for older adults to learn new concepts (Prenda & Stahl, 2001; United States Department of Labor, 2009). There is some diminished capacity in memory, accuracy, efficiency, and productivity of older workers that associate rote training techniques (memorization) as being more arduous for people over 45 years of (U.S. Accountability Office, 2008). Further research supports that successful working careers of older adults relate to higher levels of “crystallized intelligence” (Colelli & Douglas, 2004, p 21); which allows brain functioning in older adults to retain new information more effectively by linking it to data previously stored (memory). Evidence supports a connection between job training designed to facilitate the educational needs of older employees and increased job

competencies and information retention (including rote memory) (McIntosh, 2001).

Furthermore, Colelli & Douglas (2004) state that accommodating educational needs of older workers corresponds to optimizing individual learning potential of older employees without adding additional training costs.

Training factors. Evidence indicates that employers' failures to accommodate the training needs of older employees are associated with negative impacts upon efficiency, productivity, and retention (Colelli & Douglas, 2004). McIntosh (2001) states that providing realistic job goals and motivating achievement in older workers meets an emotional need in baby boomers to actively contribute to organizational success. Research supports that providing regular job challenges and making educational opportunities available to older employees correlate with optimizing individual potential and prolonging employment beyond normal retirement age (McIntosh, 2001). Literature from The United States Department of Labor (2009) identifies a connection between the benefits older employees gain from academic challenges, and greater levels of motivation, satisfaction, and dedication they exhibit. Furthermore, the availability of training opportunities for older employees relates to greater accuracy, skills, and teamwork (United States Department of Labor, 2009).

The information below describes the critical training accommodations for optimizing learning potential in older workers. Advanced learning in older employees involves modifying communications, training programs, training environments, acoustics, vision, and physical comfort.

Communication. McIntosh (2001) states effective communication supporting the training needs of older workers is associated with enhanced retention of job knowledge, satisfaction, productivity, and employment in older employees. Furthermore, evidence supports the idea that

communicating relevant job training benefits to older workers functions to enhance individual feelings of optimism, motivation, accuracy, and achievement (McIntosh, 2001). Studies indicate a connection between the effective delivery of well-structured training material and higher levels of class attendance, participation, and self-confidence among older employees (Eisen, 2005; Yazinski, 2009). Evidence supports that well structured training information clearly communicating educational objectives, methods, and expectations to older students correlates with enhanced levels of data retention, concept development, job performance, and employee retention in older workers (Yazinski, 2009).

Evidence indicates that communication (verbal or nonverbal) effectively relaying relevant job training information reduces training related stress and validates emotional needs for acceptance, respect, and inspiration in older employees (McIntosh, 2001). Yazinski (2009) states that training programs that function with a professional atmosphere of equality, respect, and purpose increase the learning potential in older employees.

Training programs. Evidence indicates that training programs structured to satisfy the learning needs of older students relate to increased employee retention rates in older employees (Gale Group, 2006). Colelli & Douglas (2004) state that educational programs enhancing job-training attributes in older employees associates with additional time needed to process, practice, and retain new information in older students. Consequently, research indicates that training methods involving hands-on or self-paced learning techniques provides older employees additional practice time needed to acquire advanced training precision, aptitude, and efficiency (Colelli & Douglas, 2004; United States Department of Labor, 2009). McIntoch (2001) states that enhanced training knowledge in older workers relates to repetitive, practical application of newly acquired job skills. Furthermore, evidence indicates a connection between training

initiatives that accommodate diverse educational demands in students and the need for utilizing multiple training techniques concurrently to reinforce learning in older workers (Yazinski, 2009). Eyster, et al (2008) explain that various training techniques reiterating information to reinforce learning in older students contributes to accommodating the needs of older employees to obtain, comprehend, develop, and preserve newly acquired job skills. Statistics show preferred training methods for older students involve smaller sized classrooms (< 16 people), hands-on learning, acoustical/visionary aids, and providing practical application of new information (Colelli & Douglas, 2004; Segrist, 2007).

Training environment. Research indicates that modifying training environments to accommodate the physical (comfort) and sensory (sound and sight) learning needs of older employees contribute to greater skill levels and loyalty in older workers (United States Department of Labor, 2009). Colelli & Douglas (2004) state that enhanced optical (vision) and acoustical (hearing) requirements of older employees relates to cost-effective training environments that increase rote memory, recall, and concept development. Additional evidence supports that enhanced ergonomic comfort in older workers correlates with heightened levels of confidence, commitment, participation, and performance in older employees (Colelli & Douglas, 2004). Information below explores common ergonomic adjustments that optimize learning potential in older students: acoustics, vision, and physical comfort.

Acoustics. It is widely known that the natural aging process diminishes the quality of hearing in older adults. Pimental (2001) states that the ability to decipher and locate high frequency tones (over 4,000 hertz) decreases gradually after turning age 40. Properly adjusting sound levels to amplify hearing in older people is associated with enhanced ability to distinguish similar sounds (Brandel, 2006). Consequently, government statistics show that background

noise and rapid speech greatly decrease the ability of older workers to remain focused while accurately interpreting and retaining information (United States Department of Labor, 2009).

Research by Colelli & Douglas (2004) explains how techniques for optimizing sound clarity and eliminating unwanted sound can contribute to acoustic clarity in older adults (Colelli & Douglas, 2004). The same authors explain that providing training environments free of echoes, vibrations (fan), and high frequency tones effectively enhance learning in older workers by eliminating distractions. Thus, optimizing audible clarity enhances learning in older workers (Colelli & Douglas, 2004).

Vision. The United States Department of Labor (2009) states that training environments adjusting lighting to accommodate the visual needs of older students enhances optical performance and increases learning potential in older employees. Proper lighting that enhances processing in older employees contributes to higher levels of mental concentration, physical comfort, personal enjoyment, and commitment (United States Department of Labor, 2009). Furthermore, lighting that enhances the usefulness of visual aids, teamwork participation, hands-on activities, and the reduction of glare in older students relates to advanced skill levels and information retention (United States Department of Labor, 2009). Statistics support a linkage between the clarity of visual aids utilizing more lighting, larger font sizes, and contrasting colors (excluding blue and green hues) and enhanced levels of learning, recall, and concept design in older employees (Colelli & Douglas, 2004). Further evidence indicates that adults over the age of 45 will eventually require the use of bifocal glasses to read items within arms length (DDI, 2009). Consequently, teaching methods that provide additional processing time for older eyes to focus and refocus on various visual aids, routinely utilized within a classroom, enhance learning levels in older employees (DDI, 2009; United States Department of Labor, 2009). Thus,

research shows that enhanced visibility accommodating optical limitations support advanced understanding in older employees.

Physical comfort. Evidence supports that physical comfort is a priority for accommodating training needs of older employees (United States Department of Labor, 2009). The United States Department of Labor (2009) states that decreased job performance in older workers is associated with greater physical discomfort (i.e. mobility, sight, sound, body temperature) that limits job abilities (i.e. accuracy, efficiency, and skill level). For example, it is common knowledge that warmer temperatures alleviate common arthritic discomfort in older adults, but once elevated temperatures get too high, alertness decreases. Research shows that requiring older workers to remain seated for longer long periods of time (over 30 minutes) reduces physical comfort, mobility, and mental concentration (DDI, 2009). Statistics indicate a connection between training environments that comfortably satisfy the physical needs of older students and increased interest, learning potential, and memory in older employees (United States Department of Labor, 2009). Smith (2008) states training sessions that last multiple days are more effective to older students when conducted in small, informal groups (< 16 people). Research by Colelli & Douglas (2004) indicate training classes consisting of ten to fifteen students seated around small tables (not traditional classroom rows) produce higher levels of active participation in older employees due to the smaller, less threatening classroom size. Thus, satisfying the physical training needs of older employees correlates with optimal learning, skill development, and information retention.

Summary

In conclusion, organizations are unprepared to handle the fallout from the mass retirement of baby boomers, which will dramatically reduce the available labor force and result

in dwindling numbers of skilled, experienced, and willing resources (Brandel, 2006; Stanley, 2006). Research indicates an increased need for organizations to prolong employment of baby boomers beyond normal retirement age preserving valuable skills, expertise, and corporate knowledge (Prenda & Stahl, 2001; Stanley, 2006). Eisen (2005) states a connection between documented work initiatives that proactively accommodate the employment needs of older workers with reductions in absenteeism, turnover, and retirement rates. Statistical evidences indicates that validating the needs for skill recognition, job flexibility, and training in older employees correlates with extended employment of workers beyond normal retirement age (Agrela, et al., 2008; Amble, 2006). Research shows that the use of effective retention strategies will be critical for growth and prosperity in both employers and employees (Colelli & Douglas, 2004). Thus, organizational survival is statistically linked to the retention of an unlimited supply of older adults, proven to be willing, able, and qualified (Redington, 2007; Valeo, 2005). Next, chapter three will describe the data collection procedures used in this study. Chapter four outlines results from the survey and chapter five summarizes the study.

Chapter III: Methodology

This study was conducted to determine the intention of employees to work past the traditional retirement age of 66. The evidence from prior studies supported the conclusion that retention strategies designed to accommodate the needs of older people effectively prolongs employment of older workers beyond normal retirement age. Researchers indicated recognition, job flexibility, and training as significant retention strategies that correlate with extended employment of individuals that are eligible for retirement. The methods used in this current study focused only on the “training” component in the retention of older employees, thus further investigation is required on other retention components that were not included in this study. The information covered in this chapter addresses subject selection and description, instrumentation, data collection procedures, data analysis, and limitations.

Subject Selection and Description

A convenience sample group (non-probability sampling) was utilized for this study. The sample population consisted of acquaintances and/or individuals recommended to the researcher. All participants in this study met the pre-qualification requirements of being employed and between 45 and 65 years of age (either male or female). A total number of 60 subjects participated in the study, consisting of 21 males and 39 females. The convenience sample group was obtained from a geographically dispersed area within Monroe and La Crosse counties in Wisconsin (USA). A total of 82 potential survey participants were solicited via electronic messaging (e-mail) invitation (44 acquaintances, 28 referrals). The researcher initiated personal contact with Wal-Mart managers and received approval to lobby for individual referrals to participate in the survey. Managers of Wal-Mart hand delivered informational flyers (Appendix A) to potential participants that met the age requirement. The paper flyers provided an

explanation for the study, an approval (signature of a Wal-Mart manager), contact information, and instructions for completing the study. All subjects were informed that participation was voluntary prior to dissemination of the survey, both verbally and in written form. The “Informed Consent Form” (Appendix B) was part of the e-mail communication sent to the participants. Having Wal-Mart managers (Mr. Gary Atkins or Mr. Ken Gunter (Wal-Mart managers of Wal-Mart) sign the informational flyer assured employees (in writing) that participation in the survey, during non-working hours, would not affect job status.

Instrumentation

An electronic survey was used in this study. The goal of the survey was to acquire reliable data to analyze the perceived benefits of training and if training prolongs the employment of older workers. Eisen (2005) supported that development of an online survey proved to be an excellent research tool, which successfully reached a significant amount of people with minimal cost, effort, and time. Safeguards within the Qualtrics survey tool were activated that guaranteed individual consent and anonymity of all participants. Additionally, the survey allowed time for respondents to deliberate, review and change responses as needed enhancing the validity of the data gathered. Survey participants were required to provide a personal e-mail address to the researcher to gain access to the survey via e-mail. An Internet communication instructed participants to initiate the survey automatically by clicking on an embedded link provided. The e-mail communication first requested voluntary participation by introducing the study, its goals, deadline, contact information, and finally the survey itself.

Survey design. Survey questions were developed exclusively to gather practical information for analyzing the relationship between training and delayed retirement. Analyzing specific training needs of older workers provided information to the researcher for development

of the original 20-question survey. The recruitment of two Subject Matter Experts (SMEs), both having experience in the field of professional training, assessing the survey provided feedback that enhanced the design, wording, and clarity of the measurement tool. Subject Matter Experts provided additional advice on the contents of the introductory e-mail (Appendix C) to assure that the tone of it was respectful and encouraged participation.

The original survey only contained multiple-choice questions (five demographic, fifteen training). Recommendations from the SMEs led to revisions reducing the original list of questions down to 10, which allowed seven new questions to be added (two demographic, five work-related, and 10 training-related). See Appendix D for the final version of the survey.

Question format. Access to the electronic survey was distributed to the sample population via e-mail. The layout of the final survey displayed the first 10 questions in a closed-ended format, which forced the respondent to select from multiple answers provided below each question. The next four questions asked participants to rank individual responses in order of importance, of which two questions allowed open-ended responses. Of the remaining three questions, two were designed as multiple-choice (one allowed an open-ended remark). The last question allowed participants the option to provide any additional information not already addressed in the survey via open-ended format.

Electronic survey. The survey was put into an electronic survey format using the Qualtrics web-based, survey tool approved by the UW-Stout Institutional Review Board (Appendix E). The participants were given survey access via e-mail communication with instructions for initiating the automated link provided. The link provided individual access to the Qualtrics survey, which automatically initiated and displayed the computerized survey for each participant in one easy click of a button. The entire survey consisted of four different computer

screens (entry, question, error, and exit). The entry (screen one) screen acknowledged that participation was voluntary and confidential and then prompted subjects to click on a button before proceeding to the first question. The question screen (screen two) allowed participants to scroll up and down to view all 17 survey questions. Participants were required to answer the first sixteen survey questions before the survey tool would allow “final submission” of the survey results (answering question seventeen was optional). The computer screen displayed an error message (optional screen three) if participants attempted to submit a survey without answering questions one through sixteen. The error message read, “Sorry, you cannot continue until you correct the following” and the computer listed all the questions that required an answer. After question number seventeen, the optional question, additional text prompted participants to review and/or revise any answers before clicking the submission button. The survey tool then displayed an exit screen (screen four) with a thank you message confirming that the submission of data was successful.

Dissemination. Participants that satisfied the survey requirements (age, employment) voluntarily provided a personal e-mail address (via verbal, e-mail, or telephone communication) to partake in the survey. The researcher, having sole access to individual e-mail addresses, preserved participant anonymity throughout the entire study by concealing personal e-mail addresses within the blind carbon copy field (bcc) of all e-mail communications. The e-mail message contained a link, instructions, contact information, and an informed consent form. On April 1, 2010, (survey deadline was March 30, 2010), the researcher deleted the spreadsheet that contained individual e-mail messages along with corresponding e-mail messages.

Data Collection Procedures

The Subject Matter Experts pilot tested the final survey, along with its online distribution process, and confirmed its operational functionality (automation) and design consistency (screen layout and syntax). After pilot testing was complete, no additional changes were made to the survey instrument prior to its distribution on March 15, 2010. Once the survey (link) was activated, the Qualtrics software tool provided instructions that prompted participants through each question and then final submission (four screens) without any imposed time restrictions. For questions one through 10, participants were prompted to select (click on) the most appropriate answer (one answer) from options provided below the question. Questions 11 and 12 required subjects to rank answers provided in order of importance, which includes the options to “write in” one additional item. The participants were asked to select all answers that applied to questions 13 and 16. Questions 14 and 15 were ranking questions providing three options to select from (i.e. Most Preferred, Neutral, and Least Preferred). Note participants were required to answer the first 16 questions before the survey tool would allow “final submission” of any of the survey results. Question number 17 was optional and provided an open text box for participants to type in any additional information. After the final question, instructions prompted participants to review/revise all responses prior to final submission, which participants were told would prevent any further changes to individual responses. Additionally, directions were provided to end the survey (click on a designated button), which simultaneously submitted the results, closed the survey, and provided a thank you message on the computer screen.

Data Analysis

For individual responses to be included in the final data analysis, respondents were required to submit answers to the first sixteen questions prior to the March 30, 2010 deadline.

The Qualtrics tool saved survey results immediately after individual surveys were submitted. Only the researcher had access to the anonymous data. Neither the Qualtrics tool nor the survey questions requested or required any private information (i.e. name, address, telephone number) from participants, which could link responses to individuals. Personal e-mail addresses were the only identifying information obtained from participants, which remained confidential. Risk involved in taking the survey was determined to be minimal due to the fact that no risky, explicit, embarrassing, or self-incriminating data requested at any time.

On April 1, 2010, survey results stored within the Qualtrics tool were accessed. Data were analyzed and tabulations identified certain training factors that were perceived as significant in the retention of older workers. The majority of information collected by the survey was ordinal data. Survey results were examined to identify points of central tendency, which were represented by mode, median, and mean values. Rank order techniques and cross tabulations were used for identifying relationships between variables. Additionally, Chi-square tests were used for comparing what significance, if any, existed among certain age levels of older employees.

Limitations

This study focused only on the training component in relation to the retention of older workers. The data was limited to analyzing one retention variable (training) thus, requiring further investigation of other retention components prolonging employment of baby boomers.

A second limitation of this study was the regulation of survey responses. The majority of survey questions (thirteen out of seventeen) were multiple-choice, thus the restriction of any pertinent training information excluded from the survey would limit data results.

A third limitation of this study was the requirement for participants to have basic computer knowledge and Internet skills. Successful completion of the online survey required participants to access to a personal e-mail Internet account and utilize general computer navigation skills. Although utilizing an electronic survey was impersonal and implied basic computer knowledge it provided a substantial sample size within a limited timeframe.

A fourth limitation was the sample population. The use of a local convenience sample group introduced the possibility for data bias due to a misrepresentation of the participants. The nature of convenience sampling (non-probability) prevents a true representative sample for replicating results.

Summary

This chapter described the methodology for a quantitative study examining the perceived relationship between training and the possibility of retaining employees beyond normal retirement age. The methods for this study included sections describing subject selection, instrumentation, data collection, analysis, and a statement of limitations. First, participation requirements (age and employment status) revealed the need to utilize a convenient sample group. Second, the instrumentation detailed the development of the measurement tool. Third, the data collection section detailed the procedures adopted for gathering data while ensuring confidentiality. Fourth, the analysis of the data was outlined and finally four limitations imposed on this study were identified. The remaining chapters were outlined to describe the results of this study (Chapter four) and summarize the study with recommendations for next steps (Chapter five).

Chapter IV: Project Goals and Objectives

This study analyzed how training might affect the retention of employees beyond normal retirement age. The literature review supported that company policies designed to accommodate the employment needs of baby boomers proved to be a highly effective strategy in the retention of older workers. Other researchers collectively recognized skill recognition, job flexibility, and training as the three most significant retention strategies supporting a healthier lifestyle in older employees.

The methodology for this study addressed only on the training component associated with employee retention strategies. This chapter analyzed the survey results in conjunction with the three objectives of this study, listed below.

1. Acquiring data and analyzing the benefits of training as perceived by older employees.
2. Acquiring data and analyzing the benefits of continuing employment as perceived by older workers.
3. Investigating the extent to which training could potentially affect the retention of workers beyond retirement age.

Information presented in this chapter describes the survey results. Approval for administering the survey was granted by the UW-Stout Institutional Review Board. Of the original 72 persons, contacted 60 subjects completed the survey within a specified two-week period. The response rate was 83.3%.

The data was submitted by the 60 participants who completed the entire survey between March 15th and March 30th, 2010. This study used a convenience sample (non-probability sampling), which disallowed the possibility of obtaining a representative sample group. The

Qualtrics online survey tool was used to collect and tally the data. Analysis of the data included frequency counts, percentages, mean scores, standard deviations, and cross tabulations.

The survey (Appendix D) was split into three categories that gathered demographic (2 questions), work-related (4 questions), and training-related (11 questions). Analysis of the data incorporated the use of tables for interpreting the survey results. Participants were required to answer questions 1 through 16 based on their current employment while question 17 was optional. The tables displayed below presents each question in the same format as it was phrased to participants. Recommendations presented in chapter five were based on analysis of the survey results.

Demographics

All participants were required to answer question one (multiple-choice) of the survey, which identified the gender of the sample population. Table 1 reported the ratio of female to male respondents was nearly 2:1. This gender disparity within the sample group limited the number of possible distinctions and conclusions that were made, based on gender.

Table 1

Question 1: "Gender":

Response	Frequency (N=60)	Percentage
Male	21	35.0%
Female	39	65.0%

Survey question two (multiple-choice) identified the approximate age distribution of all the older workers within the sample group. Data in Table 2, indicated that most respondents were in the 45 to 59 age range category.

Table 2

Question 2: "My age is":

Response	Frequency (N=60)	Percentage
45 – 59	40	66.7%
60 - 61	8	13.3%
62 - 65	12	20.0%

The work-related information gathered from question three (multiple-choice) determined the length of employment participants had with their current employer. The information in Table 3, identified the average employment duration as being the 6 to 9 years response, which also represented the largest spread amongst the data with a standard deviation of 1.45. Further analysis showed that the majority of participants (27%) identified working for their existing employer with the 3 to 5 years response. Cumulative totals supported that 28% of the older workers remained with their employer for ten years or more with the remaining 72% changing employers at least every nine years. Thus, the data collected from the sample indicated that the employment durations of older workers were getting shorter, which contradicts the 15-year average stated in the literature. One additional detail not reflected in the table was that the eight respondents denoted as working for the same employer for more than 15 years were all females.

Table 3

Question 3: "I have worked for my employer for":

Response	Frequency (N=60)	Percentage
Less than 1 year	5	8.3%
1 to 2 years	7	11.7%
3 to 5 years	16	26.73%
6 to 9 years	15	25.0%
10 to 15 years	9	15.0%
More than 15 years	8	13.3%

The information summarized in Table 4 presents how many hours participants worked each week from the four choices provided in question four of the survey. The results reflected that half of the respondents identified their weekly work hours as being in the More than 40 hours per week category, representing the majority (50%). A cross tabulation comparing weekly hours worked with current age (question two) showed an overwhelming majority of 92% of older employees (45%+50% = 92%) as working 34 or more hours per week and the remaining 8% representing those working less than 34 hours weekly.

Table 4

Question 4: "I currently work":

Response	Frequency (N=60)	Percentage
20 or less hours per week	2	3.3%
21 to 33 hours per week	3	5.0%
34 to 40 hours per week	25	41.7%
More than 40 hours per week	30	50.0%

Results

Survey question five (multiple-choice) asked participants to specify their retirement age from the five age responses provided in Table 5. The age category that the majority of older workers (both male and female) identified retirement with was 66 to 67 years of age, which also represented the mode with 45% of the responses. Further analysis of data identified the typical retirement age as being represented by the 66 to 67 years of age response (mean = 3.82). The standard deviation of 1.02 represented a rather liberal spread amongst the data points. The results of a cross tabulation between current age (question two) and perceived retirement age

supported that the number of respondents planning to retire by age 62 cumulatively totaled 8% (5% = before 55 years of age + 3% = 55 to 61 years of age = 8%). Additionally, those older workers prepared to retire after turning 66 years of age were represented by 70% of the population (45% = 66 to 67 years of age + 25% = over 68 years of age = 70%). Note that the 25% of the population that identified retirement with the over 68 years of age category was under no obligation for sustaining employment beyond retirement. Note, although 25% of the population indentified themselves as working beyond 68 years of age, nothing in the literature helped determine the overall impact of such a ratio.

Table 5

Question 5: "To me, retirement age is":

Response	Frequency (N=60)	Percentage
Before 55 years of age	3	5.0%
55 to 61 years of age	2	3.3%
62 to 65 years of age	13	21.7%
66 to 67 years of age	27	45.0%
10 to 15 years	15	25.0%

Question six of the survey identified work preferences of the population beyond retirement age. Of the four categories provided in Table 6 to respondents, the most frequent response (45%) was the continue my current job with my current employer. Furthermore a cross tabulation conducted on this question and gender also showed that the continue my current job with my current employer response also dominated in receiving the majority of responses from both genders (male = 12 responses, females =15 responses) in all three age groups (age 45-59 =

17 responses, age 50-61 = 3 responses, and age 62-65 = 7 responses). Cumulatively, 72% of older employees preferred to remain working in some capacity while approaching retirement age (45% = continue my current job with my current employer, + 3% = seek similar work with a different employer + 23% = seek different work with a different employer = 72%). Additional analysis indicated both the mean (2.35), the median were both represented by the seek different work with a different employer category, and data inconsistencies were acknowledged with a standard deviation of 1.31.

Table 6

Question 6: "As I reach retirement age, my work preference is to":

Response	Frequency (N=60)	Percentage
Continue my current job with my current employer	27	45.0%
Seek similar work with a different employer	2	28.3%
Seek different work with a different employer	14	23.3%
No longer work	17	3.3%

Information collected from question seven (multiple-choice) used a rating scale for determining how important it was that older workers receive regular job training as they approach retirement age. As categorized in Table 7, the researcher determined that the majority (40%) of older workers associated ongoing training with the more important category option provided. Both the mean (1.87) and the median classified the importance of ongoing training using the same response of the same importance. A large Chi-square value of 26.87 and a p-value of 0.00 signified that no significant differences were found outside of the expected frequencies.

Table 7

Question 7: "As I reach retirement age, the importance for me to receive regular job training becomes":

Response	Frequency (N=60)	Percentage
More Important	24	40.0%
The Same Importance	21	35.0%
Less Important	14	23.3%
Not Important	1	1.7%

Question eight (multiple-choice) of the survey gathered information used to rate the perceived attitude of employers toward supporting training for employees close to, or at, retirement age. A Likert scale (numbered one through five) was used in calculating the information displayed in Table 8. The majority of participants (40%) identified most with the neither negative nor positive category, which also represented the mean (2.85), median, and mode values. Collectively, 77% of respondents reported feeling that their employer's attitude toward training workers close to retirement age was neutral to very negative. As expected, no significant differences were found between the expected and observed results when comparing employers' attitude to employees age (question two), which was supported with a Chi-square value of 16 and a p-value of 0.00.

Table 8

Question 8: "I feel my current employers' attitude toward supporting training for workers who are at or close to retirement age is":

Response	Frequency (N=60)	Percentage
Very Negative	4	6.7%
Somewhat Negative	18	30.0%
Neither Negative nor Positive	24	40.0%
Somewhat Positive	11	18.3%
Very Positive	3	5.0%

Question nine (multiple-choice) gathered data that represented the length of time since participants last attended training. Statistics in Table 9 showed that the majority of older workers (60%) selected the over 12 months ago category, indicating that job training was not a regular occurrence. Additionally, over 12 months ago was also the category that represented the mean (2.38) and median values. The calculations used for comparing the occurrence of training (question nine) with age (question two) produced a Chi-square value of 2.57 and a p-value of 0.63, which supports the null hypothesis showing no significance among the results.

Table 9

Question 9: "The last training class I attended occurred":

Response	Frequency (N=60)	Percentage
0 - 6 months ago	13	21.7%
7 – 12 months ago	11	18.3%
Over 12 months ago	36	60.0%

To answer question ten (multiple-choice) participants were asked to denote the frequency of their training opportunities from a list of five options provided. The information displayed in Table 10 showed that a majority of responses (58%) were represented by the annually category, which qualified as receiving regular job training for this study. Consequently, the annually response was also represented the mean (4.07) and median values. Additionally, a standard deviation of 1.44 represented a rather large variation in the distribution of data. A cross tabulation that compared training opportunities with age (question two) associated the highest frequency of responses (57%) existing between training annually and the 45 to 59 age group. The second highest frequency (25%) was reflected as quarterly training also for the 45 to 50 age

group. Additional analysis that calculated a Chi-square value of 6.03 and a p-value of 0.64 indicated no significant difference between the expected and observed results.

Table 10

Question 10: “My current employer presents me with training opportunities”:

Response	Frequency (N=60)	Percentage
Never/Rarely	9	15.0%
Weekly	1	1.7%
Monthly	2	3.3%
Quarterly	13	21.7%
Annually	35	58.3%
Never/Rarely	9	15.0%

In question 11 participants were asked to rank the six training goals provided (pre-selected) in order of importance (with one being most important). The option to add a seventh goal was provided using an open-ended format for collecting additional responses. The categories presented in Table 11 were listed in descending order of importance. The category that the majority of older workers ranked as being most important was meet job/boss/performance expectations with 21 responses. Of the original six categories to pick from (excluding the other category) the one that reflected the lowest degree of variability in the data was “Increase my Knowledge” (Sd = 1.16) while meet job/boss/performance expectations was identified as having the largest variation from the mean value. Note, only two participants submitted additional training goals, which specifically recognized technical training and ergonomic devices as being important training goals. The two categories that were ranked as the least important training goals (Take a Break from Daily Responsibilities and Other (please

specify)) indicated a trend in how older workers preferring to remain productive even after reaching retirement age.

Table 11

Question 11: "Rank your training goals if you were to work beyond retirement age":

Response	Ranking							Mean	Standard Deviation
	1	2	3	4	5	6	7		
Meet Job/Boss/Performance Expectations	21	9	7	15	8	0	0	2.67	1.50
Learn New Job Skills/ Improve Performance	18	21	12	6	2	1	0	2.27	1.19
Increase my Knowledge	10	19	18	8	5	0	0	2.65	1.16
Advance my Career/ Promotion/Salary Increase	6	6	15	20	10	2	1	3.53	1.35
Acquire More Responsibilities/ Prove Myself	2	3	6	9	33	7	0	4.48	1.19
Take a Break from Daily Responsibilities	2	1	2	2	2	50	1	5.58	1.20
Other (please specify)	1	1	0	0	0	0	58	6.85	1.00

The data identified in Table 12 showed how participants ranked six training topics (provided in the survey), in descending order of importance. A seventh category that allowed participants to include additional training topics was removed from the findings of question 12 since the option was not utilized. In terms of frequency, the computer skills/new technologies training ranked highest (45%) as being the most important category receiving 25 responses (highest frequency in ranking column under number 1). Older workers indicated that the least important category was safety training with 26 responses (highest frequency in ranking column

under number 6). The categories that represented the greatest variability in the data was safety training (Sd = 1.68) with career development training (Sd = 1.28) representing the lowest.

Table 12

Question 12: "Rank the following training topics in order of importance to you":

Response	Ranking						Mean	Standard Deviation
	1	2	3	4	5	6		
Computer Skills/New Technologies Training	25	17	6	7	3	2	2.20	1.40
Specific Job Skill Training	20	14	13	6	6	1	2.45	1.40
Safety Training	5	6	2	10	11	26	4.57	1.68
Supervisory /Management Skills Training	4	7	7	7	20	15	4.28	1.57
Communication/People Skills Training	3	13	22	7	8	7	3.42	1.41
Career Development Training	3	3	10	23	12	9	4.08	1.57

In question 13, the sample population was asked to indicate their greatest, personal training benefits, which were listed in descending order of greatness in Table 13. Being required to select at least one of the ten response categories provided, participants did not utilize the other category, which accepted additional benefits to be typed into its text field, thus it was removed from the results. A Likert scale, numbered one (least importance) through eight (greatest importance), was used to analyze the results and ratings of each categories greatness level. Based on frequency, the majority of responses from older workers were associated with the immediately applying new knowledge/skills category (51 responses) whereas, the typical response corresponded with the building relationships with others category (mean = 4.7). Cross tabulations comparing personal training benefits with age (question two) produced data that

recognized the immediately applying new knowledge/skills category for receiving the highest frequencies across all three age groups. With just the opposite results, the rewards/recognition/incentives/certification category generated the lowest frequencies in all three-age brackets. Data analysis revealing a p-value of 0.79 and a Chi-square value of 11.29 supported that no significant differences existing between the expected and observed results. However, data from this question showed a trend between how the personal training benefits received by older employees correspond with organizational benefits. However, data from this question showed a trend in how the greatest, personal training benefits that older workers receive also correspond as being organizational benefits. This was supported by identifying what categories represented the lowest frequency values. Thus, using a scale where eight was least important, the three categories only providing individual benefits (not organizational) were rated third (Job Satisfaction), seventh (Building Relationships with Others), and eighth (Rewards/Recognition/Incentives/Certification).

Table 13

Question 13: "The greatest "personal" benefits I receive from training are":

Response	Frequency (N=60)	Percentage
Immediately Applying New Knowledge/Skills	51	85%
Learning New Skills/Technologies	46	77%
Job Satisfaction	41	68%
Interacting/Sharing Knowledge and Experiences	35	58%
Career Development/ Advancement Opportunities	33	55%
Building Relationships with Others	32	53%
Enhancing Productivity	32	53%
Rewards/Recognition/Incentives/Certification	15	25%

Survey question 14 asked respondents to identify their preferred method of training. The categories in Table 14 were identified specifically in the literature as training methods generally used to train older workers. Likert scale items were used to rank the eight categories provided in descending order based on preference (one = most preferred). Note that participants were required to change the order of at least one category before final submission was accepted. The majority of participants identified the one-on-one/hands on category as being the most preferred method of training (46 responses). Calculating the mean values for each category identified one-on-one/hands on as being the typical response (mean = 1.23) of older employees. Assessing the standard deviations of each category denoted the category self-guided study (On-line/CD/E-Learning) as having the highest degree of variability and one-on-one/hands on (Sd = 0.43) the lowest variability. A cross tabulation comparing training methods with age (question two) showed the one-on-one/hands on response as being the most preferred category for both the 45 to 59 and the 62 to 65 age groups. The most preferred training methods that were associated with the 60 to 61 age group showed a three-way tie between the one-on-one/hands on, small sized classroom instruction, and teleconference categories.

Table 14

Question 14: "Rank your preference of the following training methods":

Response	Most Preferred	Neutral	Least Preferred	Mean	Standard Deviation
One-on-One/ Hands-on	46	14	0	1.23	0.43
Small Sized Classroom Instruction (<10 learners)	44	16	0	1.27	0.45
Workshop/Seminar	27	28	5	1.63	0.64
Self-Guided Study (On-line/CD/E-Learning)	22	27	10	1.80	0.71
Mentoring/Reverse Mentoring	22	34	4	1.70	0.35
Average Sized Classroom Instruction (10-15 learners)	13	36	10	1.95	0.63
Teleconference (Separate locations linked together)	4	26	29	2.42	0.62
Large Sized Classroom Instruction (> 20 learners)	0	20	39	2.66	0.48

For question 15, participants were asked to rank their willingness to attend training, given the seven response categories in Table 15. A rating scale numbered one (No Impact), two (Slightly Impact), and three (Greatly Impact) was used for determining willingness levels in older workers for attending training given certain circumstances. Analysis of the data identified frequency, mean, and standard deviation values. Based on the majority of frequency, the category most often recognized by older employees as being greatly important was training topic/content, which was represented by 95% of the population (57 responses). Furthermore, the training topic/content response was also recognized as being the typical response (mean = 1.08)

which was also represented as the category with the least amount of variability ($Sd = 0.38$).

Further calculations revealing a Chi-square value of 8.48 disproving the null hypothesis.

However, a p-value of 0.08 supported an overall the null hypothesis for overall significance.

Table 15

Question 15: "Rank how the following impact your willingness to attend training":

Response	Greatly Impact	Slightly Impact	No Impact	Mean	Standard Deviation
Training Topic/Content	95%	2%	3%	1.08	0.38
Ability to Immediately Apply Training	78%	17%	5%	1.57	0.55
Lack of Management Support	65%	20%	15%	1.50	0.75
Too Costly	38%	40%	22%	1.83	0.76
Travel Distance to Training	32%	52%	17%	1.85	0.67
Facilities/Accessibility/Accommodations	20%	37%	43%	2.23	0.77
Overnight Hotel Stay	12%	48%	40%	2.28	0.67

Question 16 asked participants to indicate potential barriers that may directly prevent their continued employment beyond retirement age. Respondents were required to select a minimum of one of the nine categories provided. Data in Table 16 displayed the categories in descending order of frequency, indicating the inflexible work/retirement option as the category selected most often (42 responses) by respondents. Personal fears/stress related to training was

the category recognized as being the typical response (barrier) of older employees (mean = 4.42 on a 9.0 scale). A cross tabulation comparing employment barriers among the three age ranges (question two) identified the highest response frequency as being associated with the 45 to 59 age group (Inflexible Work/Retirement Options = 30 responses). Further calculations revealing a Chi-square value of 11.29 and a p-value of 0.79, showed significance among the results. The other (please specify) category provided the option for including an additional response (free-form text field). Of which, the four remarks received related to: 1) lack of employment opportunities, 2) lack of respect, 3) salary limits, and 4) limited retirement benefits (with continued full-time employment).

Table 16

Question 16: "In your organization, what do you view as potential barriers that may directly prevent you from working beyond retirement age?"

Response	Frequency (N=60)	Percentage
Inflexible Work/Retirement Options	42	70%
New/Changing Technologies	41	68%
Lack of Management Support (financial/emotional)	34	57%
Inefficient Job Related Training	16	27%
Discrimination/Stereotyping	16	27%
Existing Skills do not Match Job Duties	15	25%
Inadequate Access to Training Opportunities	14	23%
Personal Fears/Stress Related to Training	7	12%
Other (please specify)	4	7%

Being the only optional response in the survey, question 17 requested additional information on how job training needs to be modified to prolong employment of the older employees. The eight open-ended, text responses collected from participants addressed training needs for: 1) more technical skills, 2) greater job enjoyment, 3) greater sophistication to broaden skill levels, 4) more one-on-one training, 5) changing technology training, 6) timely feedback, and 7) more specific job training topics offered was mentioned twice.

Summary

This chapter documented the statistical findings of this study, analyzing how the training of older workers affects prolonged employment beyond normal retirement age. Commentary was provided to further explain the results gathered on each survey question. A full analysis of the survey results was used to summarize the study and present recommendations in chapter five.

Chapter V: Recommendations

The retirement of the baby boomer generation has the potential for creating the largest labor shortage in history. With a limited number of resources available in the workforce, organizational survival may depend upon the effectiveness of retention strategies to prolong the careers of worker eligible for retirement. This research examined how training influenced the retention of older employees beyond the traditional retirement age of 65. The survey tool for this study collected the results for statistical analysis of the data. Chapter five draws conclusions based on information presented in the previous chapters of this study, draw conclusions, and make recommendations on how training can effectively be used to delay retirement. Evidence indicated that although the retirement phase of the baby boomer generation has already begun, the impact of having 40% of the work-force retire over the next ten years leaves many questions unanswered regarding continued employment of older workers and an unprecedented labor shortage (Milkint, 2008). Analysis of the results indicated that job training helps prolong employment in workers approaching retirement. The literature review concluded that retention strategies accommodating educational needs of older workers benefits both employees and employers by extending careers beyond retirement age.

Summary of Study Procedures

The convenience sample group consisted of 60 working adults between the ages of 45 and 65. The measurement tool, designed and administered by the researcher, was an electronic survey used to identify how training influences retirement. Of the 17 questions making up the survey, 12 were multiple-choice, 4 questions were ranked responses, and 1 was an open-ended, optional question. The first two questions gathered demographic information. Questions three thorough six obtained work-related data. The remaining 11 questions collected statistics related

to training. Text boxes were built into the survey that required participants to acknowledge that participation was voluntary and provided instructional prompts for completing, reviewing, and submitting survey responses. The web-based survey tool collected and stored all survey responses collectively while providing the researcher with sole access to analyze the data results.

Conclusions

The first objective of this study, which was acquiring data and analyzing the benefits of training as perceived by older employees, was addressed by the examination of data presented in the literature review, development of the survey tool, and analysis of the data results. Results of this study indicated that older workers perceived the opportunity for immediately applying new knowledge and skills as being their greatest, personal training benefit. The researcher recommends that companies need to purposely design training programs around:

- Learning New Skills/Technologies
- Specific Job Skill Training
- Immediately Applying New Knowledge/Skills

These mutually provide the greatest benefit to both employees and employers.

The second objective of this investigation, which was acquiring data and analyzing to what extent baby boomers intend to work beyond normal retirement age of 65 – 66, was addressed by examining previous research (Brandel, 2006; Colelli & Douglas, 2004; United States Department of Labor, 2009). As expected, none of the evidence showed significant differences within the data, there was evidence of a growing trend in the number of baby boomers choosing to delay retirement. Findings indicated that once eligible for retirement, 25% of the baby boomers intended to retire, while the remaining 75% anticipated working beyond retirement age in some sort of capacity.

The third objective of this research, which was investigating the extent to which training could potentially affect the retention of workers beyond retirement age, was addressed by reviewing the literature review, conducting a survey, and analyzing the results. Findings from this study showed that training became more important as older workers aged, which aligns with an increased number of older workers prolonging careers and their desire to continually learn and be productive. Note, the biggest barriers opposing employment beyond retirement age were associated with Inflexible Work/Retirement Options and New/Changing Technologies, which may reveal a link if future research is conducted. Thus, survey findings indicating that older workers showed a correlation between job training and delayed retirement were unprecedented.

Recommendations to Improve Research Design

Based on the results of this study, three recommendations were identified for improving the process of this research. First, the scope of this study was quite broad analyzing several training variables (i.e. training needs, opportunities, preferences, goals, benefits, topics, methods, and barriers) in relation to retention. Each survey question addressed a separate aspect of training variable, thus the results reflected training at a universal level. Thus, the first recommendation would be to narrow the initial scope down to focus on only one or two training benefits, which would allow the survey to collect more detailed information for analysis.

The results of this study most likely represented a greater perception of women (larger female population) and Wal-Mart employees (recruited to participate), since those characteristics were identified as being most prominent in the sample used. Thus, the second recommendation acknowledged the need to obtain a larger and/or broader sample population for producing a truer representation of unbiased results.

A third recommendation recognized a need for future research on this topic. As implied in Chapters 1 and 2, only baby boomers, themselves, can collectively counteract the negative impacts associated with their own retirement. Although statistics indicated that many older workers were ready, willing, and able to work beyond retirement age, further investigation would determine what particular factors were most effective for prolonging employment. Thus, additional studies focused on investigating one training component (factor) at a time may uncover significant results overlooked in this study.

In conclusion, the scope of this study focused on evaluating how training influences the retention of older workers beyond normal retirement age. This paper outlined what steps the researcher used to collect and analyze survey results used in determining the significance of the data. Thus, the results of the survey indicated that no correlation linking training with prolonged employment was presented in the data.

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Appendix A: Informational Flyer

Employee Retention Survey

You have been selected to complete a brief computer survey that will gather information used to study the effect training has on employee retention. Participation is voluntary and results will remain confidential. Jacqueline Kroeger is the researcher responsible for administering the survey. The researcher has already gained approval from Wal-Mart store management to solicit Wal-Mart employees as participants. The signature below of your Wal-Mart manager signifies that your entire Wal-Mart management team is aware and has approved employees between 45 and 65 years of age to participate in the survey. Note: Wal-Mart management confirms that your participation will in no way affect your current employment status if you complete the survey on your own personal time, outside of work.

How to Participate:

1. Send your e-mail address to **kroegerj@uwstout.edu** as soon as possible.
2. You will receive an e-mail from the researcher with instructions and an automatic link to the survey along with an informed consent form.
3. Clicking on the automatic link will start the survey and prompt you through each question.
4. A thank you message confirms submission of the survey results for analysis by the researcher.
5. Feel free to contact the researcher at any time with any questions you may have.

Thank you for your participation, Jacqueline Kroeger: kroegerj@uwstout.edu (608-269-7909)

Wal-Mart Manager Name (printed): _____

Signature: _____ Date: _____

Appendix B: Informed Consent Form

Informed Consent

Title: Organizational Benefits of Retaining Older Workers
Investigator: Jacqueline Kroeger, UW-Stout student,
 (kroegerj@uwstout.edu)

Research Sponsor: UW-Stout, Operations and Management
 Dr. Sally Dresdow (dresdows@uwstout.edu)

Description: Your participation is requested to complete an online survey distributed via Internet electronic messaging. The results will be used in a study to gain a better understanding of how training affects the retention of workers beyond normal retirement age.

Risks & Benefits: The major benefit of this research is that the results will analyze how job training affects the retention of retirement age workers. There are no foreseen risks associated with this study.

Time Commitment: Completing the survey is expected to take ten minutes of your time.

Confidentiality: Your name will not be included in any documents or communications. To ensure individual confidentiality, survey results are analyzed as a whole.

Right to Withdraw: You may choose not to participate without any adverse consequences to you. You have the right to stop the survey at any time. Since you are participating in an anonymous online survey, once you submit your response, the data cannot be linked to you and cannot be withdrawn.

IRB Approval: This research has been approved by the University of Wisconsin-Stout's Institutional Review Board (IRB). The IRB has determined that this study meets the ethical obligations required by federal law and University policies. If you have questions or concerns regarding this study please contact the Investigator or Advisor. If you have any questions, concerns, or reports regarding your rights as a research subject, please contact the IRB Administrator.

Investigator: Jacqueline Kroeger
 kroegerj@uwstout.edu
 608-269-7909

Advisor: Sally Dresdow
 dresdows@uwstout.edu
 715-232-3085

IRB Administrator
 Sue Foxwell, Director, Research Services
 152 Vocational Rehabilitation Bldg.
 UW-Stout
 Menomonie, WI 54751
 715-232-2477
 foxwells@uwstout.edu

Statement of Consent:

By completing the following survey you agree to participate in the project entitled "Organizational Benefits of Retaining Older Workers".

Appendix C: Introductory E-mail Message

You have been selected to complete a brief survey on employee retention. Completing the survey will provide data used to study how job training affects employee retention. By clicking on “Take the Survey” link below, you will automatically begin the survey. Please complete the entire survey before March 30, 2010 for your information to qualify for the study.

Note, the attached “Informed Consent Form” guarantees that your participation is voluntary and results will remain confidential. Thank you for sharing your valuable knowledge.

Follow this link to the Survey: [Take the Survey](#)

Or copy and paste the URL below into your internet browser:

http://uwstout.qualtrics.com/WRQualtricsSurveyEngine?Q_SS=eG009wOPEXyNhMo_4TUF5pYvrE1JWRe&SVID=Prod&_1

Follow the link to opt out of future emails:

http://uwstout.qualtrics.com/CP/Register.php?OptOut=true&RID=null&LID=null&_1

Please contact Jacqueline Kroeger with any questions

Telephone: 608-269-7909

E-mail: kroegerj@uwstout.edu

**Appendix D: Electronic Survey
Employee Retention Survey Instrument**

Thank you for taking the time to participate in this survey.

You are reminded that participation is voluntary and results are confidential.

Click on the arrow button [>>] below to begin the survey.

This research has been approved by the University of Wisconsin-Stout Institutional Review Board as required by the Code of Federal Regulations Title 45, Part 46

>>

1. **Gender:**

Male Female

2. **My age is:**

45 - 59

60 - 61

62 - 65

3. **I have worked for my current employer for:**

Less than 1 year

1 to 2 years

3 to 5 years

6 to 9 years

10 to 15 years

More than 15 years

4. **I currently work:**

Less than 20 hours per week

21 to 33 hours per week

34 to 40 hours per week

More than 40 hours per week

5. **To me, retirement age is:**

Before 55 years of age

55 to 61 years of age

62 to 65 years of age

66 to 67 years of age

68 +

6. **As I reach retirement age, my work preference is to:**
 Continue my current job with my current employer
 Seek similar work with a different employer
 Seek different work with a different employer
 No longer work
7. **As I reach retirement age, the importance for me to receive regular job training becomes:**
 More Important
 The Same Importance
 Less Important
 Not Important
8. **I feel my current employers' attitude toward supporting training for workers who are at or close to retirement age is:**
 Very Negative
 Somewhat Negative
 Neither Negative nor Positive
 Somewhat Positive
 Very positive
9. **The last training class I attended occurred:**
 0 - 6 months ago
 7 - 12 months ago
 Over 12 months ago
10. **My current employer presents me with training opportunities:**
 Never/Rarely Weekly Monthly Quarterly Annually
11. **Rank your training goals if you were to work beyond retirement age:**
 (Click and drag items below to rank in order with 1 being most important)
 Increase my knowledge
 Learn new job skills/improve performance
 Advance my career/promotion/salary increase
 Acquire more responsibilities/prove myself
 Meet job/boss/performance expectations
 Take a break from daily responsibilities
 Other (please specify: _____)
12. **Rank the following training topics in order of importance to you:**
 (Click and drag items below to rank in order with 1 being most important)
 Safety Training
 Specific Job skill Training
 Career Development Training
 Supervisory/Management Skills Training

- Communication/People Skills Training
 Computer Skills/New Technologies Training
 Other (please specify: _____)

13. The greatest “personal” benefits I receive from training are:

(Check those that apply)

- Career development/Advancement opportunities
 Interacting/Sharing knowledge and experiences
 Rewards/Recognition/Incentives/Certification
 Immediately applying new knowledge/skills
 Building relationships with others
 Learning new skills/technologies
 Enhancing productivity
 Overall job success
 Job satisfaction
 Other (please specify: _____)

14. Rank your preference of the following training methods:

	Most Preferred	Neutral	Least Preferred
One-on-One/ Hands-on	_____	_____	_____
Workshop/Seminar	_____	_____	_____
Small Sized Classroom Instruction (< 10 learners)	_____	_____	_____
Medium Sized Classroom Instruction (11-19 learners)	_____	_____	_____
Large Sized Classroom Instruction (> 20 learners)	_____	_____	_____
Self-Guided Study (Online/CD/E-Learning)	_____	_____	_____
Teleconference (Separate locations linked together)	_____	_____	_____
Mentoring/Reverse Mentoring	_____	_____	_____

15. Rank how the following impact your willingness to attend training:

	Greatly Impact	Slightly Impact	No Impact
Too Costly	_____	_____	_____
Travel Distance to training	_____	_____	_____
Facilities/Accessibility/Accommodations	_____	_____	_____
Ability to immediately apply training	_____	_____	_____
Lack of management support	_____	_____	_____
Overnight Hotel Stay	_____	_____	_____
Training topic/content	_____	_____	_____

16. In your organization, what do you view as potential barriers that may directly prevent you from working beyond retirement age?

(Check all that apply)

- Discrimination/Stereotyping
- Inflexible work/Retirement options
- Lack of management support (financial and personal)
- Inadequate access to training opportunities
- Personal fears/stress related to training
- Existing skills do not match job duties
- Inefficient job related training
- New/changing technologies
- Other (please specify: _____)

17. Please provide any additional information on how job training needs to be modified to prolong your employment, please be specific.

You can review and change your survey responses by scrolling up/down on this screen BEFORE clicking the button below.

When you are satisfied with your responses, click on the **right** arrow button below [>>] to end the survey. No additional changes are possible once the survey ends.

<<

>>

We thank you for your time spent taking this survey.
Your response has been recorded.

Powered by **Qualtrics.com** Survey Software
for Success

Appendix E: Protection of Human Subjects in Research Form

University of Wisconsin Stout
Protection of Human Subjects in Research Form

Data collection/analysis cannot begin until there has been IRB approval of this project.

Directions:

- Individuals who have completed the UW-Stout Human Subjects Training and can prove certification are eligible to file this form.
- This form must be filed and approved prior to any student (undergraduate or graduate), faculty, or staff conducting research.
- Complete this form on-line and print. Handwritten forms will not be accepted. For your benefit, save your completed form in case it needs to be revised and resubmitted.
- Send or take the completed form, with required signatures and required materials attached, to Research Services, 152 Voc. Rehab. Building.
- This is a professional document; please check spelling, grammar and punctuation.

Research is defined as a systematic investigation, including research development, testing and evaluation, designed to develop or contribute to generalizable knowledge.

A human subject is defined as a living individual about whom an investigator obtains either 1) data through intervention or interaction with the individual; or 2) identifiable private information.

Investigator(s):

Name: Jacqueline Kroeger ID: Stout ID# 0134349 (People Soft ID# 00790679) Daytime Phone # 608-269-7909
Program: Training & Development Graduate Student: Undergraduate:
e-mail address: kroegerj@uwstout.edu Signature: _____

Name: ID: Daytime Phone # Program: Graduate Student: Undergraduate:
e-mail address: Signature: _____

Name: ID: Daytime Phone # Program: Graduate Student: Undergraduate:
e-mail address: Signature: _____

For students:

Research Advisor's Name: Sally Dresdow Department: Operations and Management
Signature: _____ Date of Approval: _____
Research Advisor: Have you completed UW-Stout's Human Subjects Training? Yes No
Reminder: You must have completed the new training after January 2, 2007.

Project Title: Organizational Benefits of Retaining Older Workers

Sponsor (Funding agency, if applicable):

Is this project being supported by Federal funding? Yes No

You must answer all of the following questions completely and attach all required forms.

- I. Describe the proposed research/activity stating the objectives, significance, and detailed methodology (approximately 250-500 words; descriptions are to be written in future tense).

Objectives:

This study will seek to determine how training opportunities affect the retention rates of older workers between the age of 45 and 65. The research objectives include :

1. Acquiring data and analyzing the benefits of training older employees.

2. Acquiring data and analyzing the benefits of retaining employment of older employees.
3. Analyzing how training accommodations affect retention rates in older workers.

Significance:

The baby boomer generation has already started to retire. This group will equate to 75 million retired people and as the trend continues, organizations will experience devastating labor shortages. The generations that precede baby boomers will critically lack the necessary number of skilled adults needed to replace 40% of the workforce, currently made up of baby boomers. Organizational survival will depend upon successful retention strategies. Retention strategies that accommodate the needs of 45 to 65 year olds will effectively prolong employment of baby boomers and significantly reduce the impact of a major labor shortage.

Detailed Methodology:

An electronic survey will be created, tested, and administered via the Internet to collect research data. A convenience sample group consisting of 50+ participants of working adults (male and female) between the age of 45 and 65 will be asked to participate. Participants will provide a personal e-mail address and then receive an electronic message which contains a link providing automatic accesses to the online survey. The survey will prompt participants through each question, allow for review options, and confirm final submission. The Qualtrics survey tool will collect data and analysis will be conducted to determine significant trends.

2. **Is this research?**

- (a) Is your activity intended for public dissemination? Yes No
- (b) Can it reasonably be generalized beyond the research sample? Yes No

If you answered “no” to both a and b, do not continue with this form. Stop here and submit form.

3. Does your research involve human subjects or official records about human subjects? Yes No
- If yes, continue with this form. If no, stop here and submit form.**

4. Are you requesting exemption from IRB review in one of the federally approved categories? **If no, skip to Question #5 regarding Human Subjects Training.** If yes, please select the category below that applies and continue with the form. The IRB will assess qualifications for exemption status based on your responses. If you have questions, more information about the exemption categories can be found on the OHRP website: <http://www.hhs.gov/ohrp/humansubjects/guidance/45cfr46.htm#46.101>.

The following categories of research are exempt from this policy:

- (1) Research conducted in *established or commonly accepted educational settings, involving normal educational practices*, such as (i) research on regular and special education instructional strategies, or (ii) research on the effectiveness of or the comparison among instructional techniques, curricula, or classroom management methods.
- (2/3) Research involving the *use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures or observation of public behavior*, unless:
(i) information obtained is recorded in such a manner that human subjects can be identified, directly or through identifiers linked to the subjects; **AND** (ii) any disclosure of the human subjects' responses outside the research could reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, or reputation.
- (4) Research involving the collection or study of *existing* data, documents, records, or pathological or diagnostic specimens, **if these sources are publicly available OR** if the information is recorded by the investigator in such a manner that **subjects cannot be identified**, directly or through identifiers linked to the subjects.
- (5) Research and demonstration *projects which are conducted by or subject to the approval of department or agency heads*, and which are designed to study, evaluate, or otherwise examine:
(i) **Public benefit or service programs**; (ii) procedures for obtaining benefits or services under those programs; (iii) possible changes in or alternatives to those programs or procedures; or (iv) possible changes in methods or levels of payment for benefits or services under those programs.
- (6) Research involving *taste and food quality evaluation* or consumer acceptance studies.

5. Human subjects training must be completed prior to filing this form. Have you completed UW-Stout's Human Subjects Training (<http://www2.uwstout.edu/rs/hstraining/index.htm>)? Yes No

6. Please note that research cannot begin until this project has been approved by the IRB. When is the data collection for the research *intended* to begin and end? **02/2010** to **03/2010** (enter month/year)

7. Can the subjects be identified directly or through any type of identifiers? Yes No If yes, please explain.

8. Special precautions must be included in your research procedures if any of these special populations or research areas are included.

Are any of the subjects:

- | | | | |
|---|---|---|---|
| (a) minors (under 18 years of age)?
(consent from parent & subject required) | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | Does the research deal with questions concerning: | |
| (b) legally incompetent? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | (a) sexual behaviors? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| (c) prisoners? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | (b) drug use? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| (d) pregnant women, if affected
by the research? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | (c) illegal conduct? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| (e) institutionalized? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | (d) use of alcohol? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| (f) mentally incapacitated? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | | |

9. Voluntary participation/consent form:
Expected Number of Participants **50+**

Describe the method:

(a) for selecting subjects.

The researcher will utilize a convenience sample group of males and females for this research study. Participants are required to be employed and between 45 and 65 years of age. A minimum of 50 participants consisting of acquaintances, recommended individuals, and local (Lacrosse, Wisconsin) Wal-Mart employees will be asked to complete a survey.

(b) for assuring that their participation is voluntary. If subjects are children and they are capable of assent, they must give their permission, along with that of their parent, guardian, or authorized representative. NOTE: A school district cannot give permission or consent on behalf of minor children.

All participants are required to be between 45 and 65 years of age. Minor children will not be allowed to partake in this study. All subjects will be informed that participation is voluntary prior to the launching of the survey. The message of "voluntary participation" will be reiterated verbally (by the researcher and Wal-Mart management), in written form (informational flyer), and all electronic messaging communications (e-mail). As an additional precaution, the survey will force all subjects to read a text box explaining that participation is voluntary then click on a button before being able to view the first survey question.

10. Procedures: Describe how subjects will be involved in detail.

Potential participants are asked to complete a brief online survey containing questions about training and employee retention. The researcher will explain that the information gathered from the survey will be used to complete a UW-Stout research project in direct supervision of a faculty advisor. Willing participants will provide a personal e-mail address to the researcher. Subjects will receive an initial e-mail reiterating the survey process along with contact information. A second e-mail instructs subjects to click on an enclosed link to automatically access the online survey. The survey will walk participants through each question, one at a time, and allow for review, changes, and final submission. No additional contact will be made with subjects after the second email is sent.

If the study:

- (a) involves false or misleading information to subjects or

- (b) withholds information such that their informed consent might be questioned, or
- (c) uses procedures designed to modify the thinking, attitudes, feelings, or other aspects of the behavior of the subjects, describe the rationale for that, how the subjects will be protected and what debriefing procedures you will use.

Not applicable.

11. Special precautions must be included in your research procedures if you are doing an online survey.

Are you doing an online survey? Yes No

If yes, please answer the following questions. If no, please skip to the next question.

(a) Will your survey results be posted on a website that could be accessed by individuals other than the investigators? Yes No

(b) Does the URL for the survey include information that could identify individuals, such as a student ID? Yes No

(c) When you send out an email inviting subjects to complete the survey:

Will you place all of the email addresses in the "bcc" line? Yes No

Will you have the "read receipt" function turned off? Yes No

(d) If your survey contains questions where the subjects choose from a drop-down menu, do they have the option to choose "no response" or to leave the question blank?

Yes No No drop-down questions

If, in question #11, you answered "yes" to question (a) or (b), or if you answered "no" to question (c) or (d), please address your reason(s) when completing question #12.

12. Confidentiality: Describe the methods to be used to ensure the confidentiality of data obtained. **Participants will complete an online survey using Qualtrics, which provides confidentiality to all participants and approved by UW-Stout. The survey will be disseminated via electronic mail, using an ambiguous e-mail address provided by participants, which will be concealed in the blind carbon copy (bcc) field. Results from completed surveys will be automatically collected and held by the Qualtrics software tool. Only the researcher will have authority to access the anonymous data. Neither the Qualtrics survey tool or the survey questions request or require any personal or identifying information (such as name, address, telephone number), which could link responses to individual participants.**
13. Risks: Describe the risks to the subjects and the precautions that will be taken to minimize them. (Risk includes any potential or actual physical risk of discomfort, harassment, invasion of privacy, risk of physical activity, risk to dignity and self-respect, and psychological, emotional, or behavioral risk.) Also, address any procedures that might be different from what is commonly established practice for research of this type. **Precautions have been taken to minimize any potential risks associated with this study. The investigator is the only person with access to personal e-mail addresses of the subjects, which will only be utilized for this study. All e-mail addresses will be concealed in communicates by utilizing the blind carbon copy (bcc) field, which keeps participation anonymous. In the event an e-mail address is accidentally publicized and a subject receives unsolicited/unfamiliar e-mails, for their protection they are instructed to delete them immediately.**

The researcher has an ethical obligation to guarantee that Wal-Mart management guarantees employee participation will not affect job status when protocol of completing the survey on personal time, outside of work is followed. If this protocol is abused, the foreseeable risk may include disciplinary action or loss of employment. In the event a subject completes the survey at work, on a work computer, or during an individuals working hours, the employer has the right to take action. The researcher does not see any other possible risks involved when this protocol followed. Data gathered from the survey does not contain any risky, explicit, embarrassing, or self-incriminating information

14. Benefits: Describe the benefits to subjects and/or society. (These will be balanced against risk.)
Participants will benefit from the self-gratification from assisting in a research project. Future benefits may be in the form of improved training accommodations that aid specific needs of older employees which could be linked to data gathered from this study.
15. Attachments to this form: (NO ACTION WILL BE TAKEN WITHOUT THESE FORMS)
- (a) Consent form(s). Form(s) should include explanation of procedures, risk, safeguards, freedom to withdraw, confidentiality, offer to answer inquiries, third party referral for concerns, and signature (only if the subjects can be identified by any means). If the survey is strictly anonymous, then a signature is not required). Sample consent forms can be found at <http://www.uwstout.edu/rs/documents/cform.doc>
- (b) Questionnaire/Survey Instrument. The final version of the Questionnaire/Survey instrument must be attached. Also, if the survey is being conducted verbally, a copy of the introductory comments and survey questions being asked must be attached to this form. If your survey includes focus group questions, a complete list of the questions should be attached. For research using a published/purchased instrument, a photocopy of the complete survey will suffice.
- (c) Printed copy of the UW-Stout Human Subjects Training Certification.

The project or activity described above must adhere to the University's policies and institutional assurance with the U.S. Department of Health and Human Services regarding the use of human subjects. University review and approval is required. **REMINDER: You are in violation of UW-Stout, UW System, and federal government policies if you begin your study before IRB approval is obtained.**

Projects that are not completed within one year of the IRB approval date must be submitted again. Annual review and approval by the IRB is required. Projects that are determined to be exempt from IRB review hold exempt status for a period of 5 years, unless there are significant changes to the project.

Institutional Review Board Action:

- Project is exempt from IRB review under category _____. Exemption holds for 5 years.
- Project is exempt from IRB review under category _____ *provided minor modifications are completed.* Exemption holds for 5 years.
- Project approved through expedited review.
- Project approved through expedited review *provided minor modifications are completed.*
- Project approved through the full board review process; date of meeting: _____
- Additional information is requested. Please see attached instructions and resubmit.
- Project not approved at this time.
- Project does not include human subjects.
- Project is not defined as research.

Signature: _____

Institutional Review Board Chair or Designee

Date