

## **ABSTRACT**

VANARSDALL, INEZ FRICK. Accentuate the Positive: An Exploratory Case Study Using the Approach of Positive Psychology to Understand the Contributory Value of Older Workers. (Under the direction of Dr. Julia Storberg-Walker).

This exploratory, qualitative, multiple case study examined three organizations who received AARP's award for "Best Employers for Workers Over 50." The purpose of the study was to understand more about how positive attitudes towards older workers manifests in positive organizational behaviors in terms of employment practices. Beliefs, attitudes and policies for each organization were analyzed using the PIES (psychological, intellectual, emotional, and social) Model to define human capital and is based on a positive psychology perspective. This study sought to provide an understanding of how these positive attitudes may lead to positive outcomes for both employees and the organization. Results indicated that those organizations with favorable policies and practices for recruiting, training and career development, workplace accommodations, flexible work options, health benefits, and retiree options benefited all employees, not just older workers, exhibited and expressed favorable attitudes towards employees and strove to provide a supportive culture. The implication of the study and results demonstrate a link between behaviors and attitudes. While the study contributes to understanding the importance of positive attitudes, further research is needed to more clearly understand the link between behaviors and attitudes towards older workers.

Accentuate the Positive: An Exploratory Case Study Using the Approach of Positive Psychology to Understand the Contributory Value of Older Workers

by  
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## **DEDICATION**

This work is dedicated to Eko, my four footed friend who lay quietly at my feet, offered unreserved support, and provided gentle nudges to move me forward.

## BIOGRAPHY

The author of this study, Inez vanArsdall was born in a rural community in piedmont North Carolina. She lived in California and Louisiana before returning to North Carolina and resides in Chapel Hill, North Carolina.

She earned her B.A. in English and French from the University of North Carolina at Chapel Hill (UNC) and her M.S. from Louisiana State University in horticulture and environmental science. During her career, Inez worked in the environmental field and transitioned into training and development when she received the opportunity to work at North Carolina State University in the Industrial Extension Service. Here she developed and delivered training courses and outreach workshops on environmental issues. This led to an interest in adult education and she enrolled at NCSU to pursue a M.S. in adult education with an emphasis on human resource development. Initially she had hoped to pursue the gerontology curriculum offered within the Department; however, this curriculum has been discontinued. The interest in older adult learners continued and she was able to participate in workshops, conferences and volunteer opportunities to develop a better understanding of older adults, specifically older workers, ageism, and age discrimination. She is part of a workgroup sponsored by UNC's Institute on Aging and presented a paper at the NC Conference on Aging.

## **ACKNOWLEDGEMENTS**

First, I would like to thank Dr. Julia Storberg-Walker for allowing me into the HRD program and making completion of my thesis possible. She provided guidance and encouragement when needed and a nudge when the time called for it.

In my first few years in the Department, Dr. Diane Chapman served as a valuable resource offering answers to my many questions. She also made me realize it is possible to take things too seriously.

Who would have thought that learning about organizations could be interesting as well as fun? I have Dr. Samuel Pond to thank for a new way of looking at the complexity of an organization and understating that more than work goes on there.

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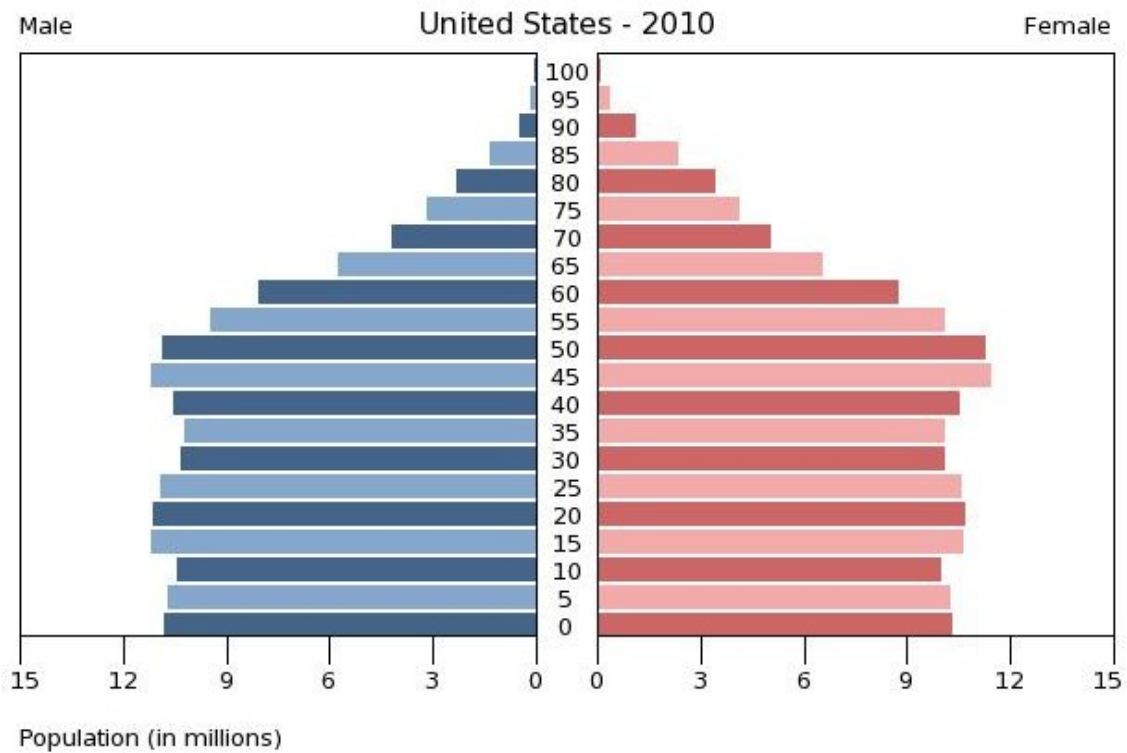
## CHAPTER ONE: INTRODUCTION

### Context of the Problem

The workforce in the United States is aging and mature workers ages 55 to 64 constitute the fastest growing sector in the labor pool (AARP, 2000; Albright & Cluff, 2005; Callanan & Greenhaus, 2008; Calo, 2007; Toossi, 2004, Weiss & Maurer, 2004). As older people begin to make up a larger portion of the workforce and the younger generation to replace older workers shrinks, this may result in a growing scarcity of knowledgeable and competent professionals in our global labor pool (Arnone, 2006; Drucker, 1999; Dychtwald & Baxter, 2007; Forte & Hansvick, 1999). As early as the 1970's, articles appeared presenting evidence that the population demographics in the United States as well as other industrial countries would impact the source of labor (Toder, Johnson, Mermin & Lei, 2008). Organizations were encouraged to develop strategies that would attract older workers to fill the labor shortage (AARP, 2006; MetLife, 2006; Peeters & Emmerik, 2008).

Current estimates place those workers in the United States aged 55 and over at 18.4 million, representing about 13 percent of the labor force. By 2015, the number will increase to 31.9 million or 20 percent of the labor force (Hedge, Borman & Lammlein, 2006; Noonan, 2005; Rix, 2002; U.S. General Accounting Office, 2001; Weiss & Maurer, 2004). Estimates are similar in the 15 countries of the European Union. Between 1995 and 2030, the average proportion of workers aged 45 to 59 years may rise from 27 to 33 percent (Lahn, 2003). It is important to realize that extended work life has personal, social, and economic implications. Changes in needs and opportunities for older workers result from new forms of work organization, wide spread use of information technology and restructuring of the

organizations (Fuller & Unwin, 2005). The assumption that older workers want to retire is not necessarily true (AARP, 2000; Greller, Stroh, 2004). The issue of retaining the experience and expertise of mature workers also represents a challenge for American businesses from the standpoint of workforce readiness (AARP, 2006; Albright & Cluff, 2005; GAO, 2003; Pitt-Catsouphes, 2007). The U.S. Department of Labor projects that between 2010 and 2025 up to 95 million baby boomers will leave the U.S. workplace but only 40 million members of Gen X and Gen Y will be available to replace retirees (AARP, 2008).



Source: U.S. Census Bureau, International Data Base

Figure 1: *Population Demographics for the United States in 2010*

The above population pyramid provides a graphical representation of the 2010 makeup of the population that triggered the concerns expressed by researchers about the aging of the U.S. population. The baby boom generation is greater than the cohorts before and after it (Cappelli, 2003). There are five generations represented in the population demographics: veterans/traditionalists born before 1946; baby boomers born between 1946 and 1964; Generation X born between 1965 and 1980; and Generation Y or Echo Boomers, born after 1980. The generation after Generation Y has been called Generation Z or the “Net Generation. In the year 2000, veterans were 55+, baby boomers, 36 – 54, Generation X, 20 – 35, and Generation Y 19 and below (Dychtwald, & Baxter, 2007; Mermin, Johnson, & Toder, 2008; O’Neill, 2009). For the year 2010, ten years would be added to the above categories. The pyramid shows the balloon in population for the baby boomers and the tapering off of the population growth after the baby boom generation. The share of the U.S. population ages 65 and older is projected to increase from 12.4 percent in 2000 to 19.6 percent in 2030 and continue to grow through 2050 (GAO, 2003). The oldest of the baby boom generation are eligible to retire in 2009. By the end of the decade (2010) lower birth rates and the aging of the baby boom generation could result in that nearly 40% of the workforce will be older than 45 (Albright & Cluff, 2005; O’Neill, 2009).

### *The Aging Workforce*

While there is evidence that the aging workforce may have significant impact on the labor resources available, employers have not felt the push to hire older workers (Eschtruth, Sass, & Aubry, 2007; GAO, 2003; Grossman, 2003; Mermin, 2007; Piktialis, 2007; Pitt-Catsouphes, 2007; Towers, 2005). To date, the present labor supply has been able to meet

employer needs. Although the economic environment may change, the predicted labor shortage has not become a reality (Cappelli, 2003; Judy, 2006; Lockwood, 2003; McEvoy & Blahna, 2001; Mermin, Johnson & Toder, 2008; MetLife, 2006). Older workers, especially those in the baby boom generation indicate either financial or personal desires to continue work after the traditional retirement age (AARP, 2000; Dychtwald & Baxter, 2007; Towers, 2005). Older workers may want to continue employment; however hiring and retaining of employees is dependent on the employer and employers do not feel the incentive to take advantage of this available labor resource (Loretto & White, 2006; Mermin, 2007; Munnell & Sass, 2000; Rix, 2002).

An important question arises when addressing how to understand the issue of employer attitudes about hiring older workers. What is old or when is someone considered old? There is no agreement by researchers, policy makers, employers or individuals on how to define old. The Age Discrimination in Employment Act (ADEA) of 1967 and amended in 1986 and 1991 prohibits age discrimination against persons 40 years of age or older in the U.S. (Macnicol, 2006; Macnicol, 2007). AARP, formerly known as the American Association of Retired Persons and founded in 1958 is a nonprofit, nonpartisan organization for people age 50 and over (AARP, 2000). For Social Security, there has been a gradual rise in age eligibility for full benefits. The “normal retirement age,” is now age 65 and will rise to 67 (AARP, 2008; Macnicol, 2006). Much of the research and surveys focused on issues of older workers tend to use 55 to define old (Rix, 2002). It may be reasonable to acknowledge that there is no one accepted definition of old since older adults are not homogeneous and represent a highly diverse group (Albright & Cluff, 2005; Macnicol, 2006; Posthuma &

Campion, 2009). It is difficult if not impossible to assign a specific chronological age at which an individual becomes old.

The workforce and population as a whole in the U.S. are aging. Although there is a labor shortage in a growing number of sectors of the economy, the massive labor shortage predicted has not materialized (Cappelli, 2003). Many workers intend to work beyond the traditional retirement age (Towers, 2005). Few employers admit to having a negative view; however studies, surveys and literature reveal that employers are reluctant to hire older workers (Gringart, Helmes & Speelman, 2005; Johnson, 2007; Mermin, Johnson & Toder, 2008; Peterson & Spiker, 2005). What seemed to be an obvious win-win solution to the problem of reduced labor force and older workers who want to continue in the workforce is a more complex issue.

### The Problem

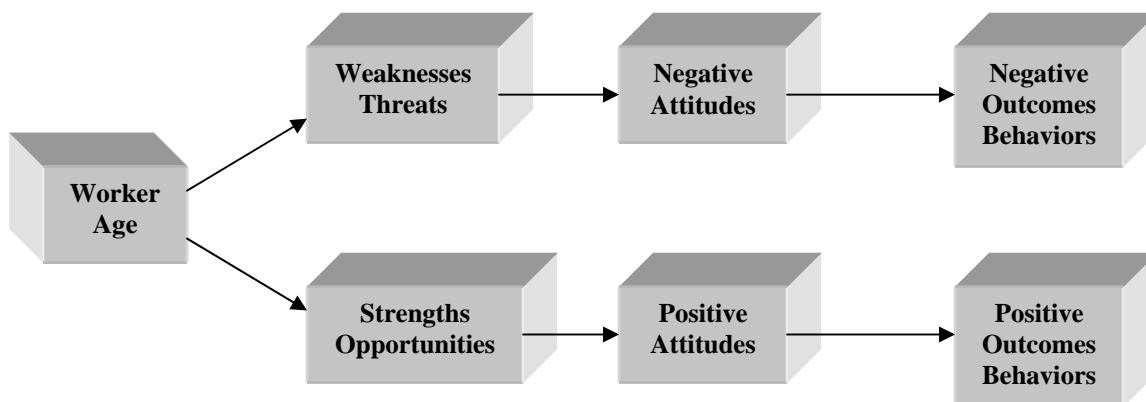
Despite availability, capability, and inclination of older workers to remain part of the workforce, research reveals that older workers continue to be perceived and evaluated less favorably than younger workers (Kite, Stockdale, Whitley, & Johnson, 2005). Applicants fifty years or older are much less likely to be hired than younger applicants (Lahey, 2005). Negative stereotyping becomes the foundation for developing negative attitudes that affect work opportunities for older workers (Gringart, Helmes & Speelman, 2005; Weiss & Maurer, 2004). If these negative attitudes persist, older workers will continue to face barriers to employment (Rix, 2002) and initiatives to recruit older workers will not be effective (Piktialis, 2007). Employers must first overcome these biases before they are willing to enact programs to support older workers (Peterson & Spiker, 2005).

Past and present research suggests that there has been no real change in attitudes about older workers which in turn impacts decisions to hire older workers (Taylor & Walker, 1998). Weiss & Maurer (2004) state that research over the last 30 years indicates there continues to be a negative bias towards older workers. There is consistency in these studies pointing out the attitudes concerning older workers are widespread and entrenched (Rix, 2002).

Figure 2 provides a graphical illustration of how the age of a worker results in different outcomes. If the applicant for a position is young, the candidate is viewed more favorably. Studies have shown that during interviews or when reviewing resumes, the younger individual is reviewed more positively and is more likely to be hired than the older candidate with the same qualifications (Avolio & Barrett, 1987; Finkelstein, Burke & Ragu, 1995). The path for the younger worker follows the lower route in which positive value is placed on his/her capabilities resulting in positive attitudes towards the younger individual. The consequences of these positive employer attitudes are favorable employment practices and behaviors. The younger person is more likely to have a more positive evaluation and be hired, be selected more often for promotion, have more opportunities for training, and receive a higher performance evaluation (Forte & Hansvick, 1999; Gregory, 2001).

The path for the older worker is shown in the upper route and the focus on weaknesses leads towards negative employer attitudes. For the older worker, the outcomes are quite different and the older individual is more likely to have a lower evaluation in an interview, is less likely to be hired, will receive fewer promotions, have less opportunity for

training, be given a lower performance evaluation, and will be more likely to be laid off (Gordon & Avery, 2004; Finkelstein, Burke & Ragu, 1995).



Based on “Establishing the positive contributory value of older workers: A positive psychology perspective,” by S. Peterson and B. Spiker, *Organizational Dynamics* 34(2), p. 153-167.

Figure 2: *Difference in Outcomes Based on Attitudes*

Studies confront these myths and stereotypes and find no relation between age and job performance (McEvoy & Blahna, 2001; Sterns & Miklos, 1995; Stoney & Roberts, 2002). Chronological age is not a valid predictor of job performance because individuals, young or old, can differ a great deal from one another in terms of ability and performance (Hedge, Borman & Lammlein, 2006). Negative employer attitudes towards older workers must be addressed if age barriers in employment are to be removed (Taylor & Walker, 1998) and traditional research has done little to dispel or change the stereotypes that result in attitudes that undervalue older workers (Forte & Hansvick, 1999).

Further support for examining negative stereotypes is provided by Duncan’s (2001) article stating that discrimination against older employees is not only socially unjust but

irrational and damaging in commercial terms to an organization. In this context, there are business costs associated with negative or positive decisions about hiring and retaining older workers. The most frequent decision made by employers Duncan (2001) terms as negative/irrational and is based on negative stereotypes underlying employer attitudes and practices towards older workers.

Despite these calls, the relationship between employers' attitudes about older workers and their practices has not been studied in great detail. Research has shown the relationship between attitudes and behaviors suggesting that attitudes are able to predict behavioral intentions and overt behavior (Ajzen, 2001). Will new habits and behaviors towards older workers in turn change the negative attitudes or can attitudes help change behaviors? Peterson & Spiker (2005) suggest that understanding the contributory value of the older worker will lead to more positive attitudes which in turn should favor practices and behaviors supportive of the older worker.

While research has shown that age is a significant factor in attitudes towards workers and that older workers continue to be perceived less favorably than younger workers (Finkelstein, Burke & Ragu, 1995; Hassell & Perrew, 1995; Kite, Stockdale, Whitley & Johnson, 2005; Rosen & Jerdee, 1976a), much is still unknown about the role that age plays in the formation of employer attitudes towards older workers. Understanding attitudes and beliefs about the aging work population is important and research is needed to examine the issues of age stereotyping and age discrimination in the workplace (Finkelstein, Burke & Ragu, 1995). In order to gain insight to these stereotypes and attitudes that continue to persist, it will be useful to investigate the relationship of employer attitudes and behaviors

towards older workers as they relate to employment decisions suggesting that a positive approach may help to confront and dispel age myths enabling younger and older workers to follow the same path.

### Purpose and Research Questions for the Study

The purpose of this exploratory qualitative case study is to gain a better understanding of positive employer attitudes concerning older workers and the connections to behaviors and practices supportive of older workers. Data from semi-structured interviews was collected from key human resource managers in three organizations, selected by AARP as best employers for workers over 50. This purposive sample captured organizations that exhibit forward-thinking approaches to recruiting and supporting older workers. These companies implement recruiting efforts, management styles, training policies, work arrangements, benefits, and other company policies to attract and keep valuable employees of all ages. This study contributes to filling a gap in the literature, as few studies focus directly on the employer perceptions of the older workers and the outcome of employer behaviors and practices (Forte & Hansvick, 1999).

Specifically, this study answered the following three questions:

1. What are the attitudes towards older workers expressed by those employers who exhibit behaviors and practices favorable to older workers?
2. Are these attitudes from a negative or positive perspective, overcoming negative stereotypes or appreciating the contributory value of older workers?
3. Has the employer benefited in terms of creation and retention of institutional memory, increased productivity, decreased turnover, and increased loyalty?

### Theoretical & Conceptual Foundations

As will be described more in chapter 2, research on attitudes towards older workers has spanned five decades and the results remain fairly consistent (Gordon & Avery, 2004). If age barriers in employment are to be confronted and removed, it is necessary to target stereotypical attitudes towards older workers (Taylor & Walker, 1998). This study utilizes the perspective positive psychology and suggests that examining the attitudes of organizations who have already overcome stereotypical biases against older workers will provide guidance for policy makers and advocates of older workers (Peterson & Spiker, 2005). The study assumes that the purposive sample – AARP award winning employers – will likely have positive attitudes towards older workers, and understanding these attitudes will not only contribute to filling the gap in the literature (employer's attitudes of older workers) but also have practical implications (improved organizational attitudes and policies).

There were four literature streams guiding this inquiry. First, a positive psychology framework was used to make sense of interview data. Second, research on employer attitudes towards older workers was used to understand current scholarship and practice. Third, research on ageism and discrimination is presented as a way to justify the problem currently facing older workers. Fourth and finally, The PIES model suggests that human capital is comprised of four subsets of capital: psychological capital, intellectual capital, emotional capital and social capital. This approach lays the foundation for the study to understand how focusing on positive contributory value results in positive organizational outcomes. Each stream is introduced here briefly, and described in detail in chapter 2.

### *Developing Positive Attitudes*

The study of what is positive within organizations began long before the 21<sup>st</sup> century. Abraham Maslow, one of the founders of humanistic psychology, introduced the concept and the term in a chapter of his book, *Motivation and Personality*, entitled *Toward a Positive Psychology* (Maslow, 1954). In this chapter it notes, “It is as if psychology had voluntarily restricted itself to only half its rightful jurisdiction, and that is the darker, meaner half (Maslow, 1954, P. 354). Almost 50 years later, there is renewed interest in a perspective that seeks to shift the focus of psychology from the preoccupation of the worst in life towards an appreciation of positive qualities (Seligman & Csikszentmihalyi, 2000; Sheldon & King, 2001; Wright, 2003). Seligman is generally recognized as heading up today’s positive psychology movements and observes that great strides have been made in understanding human pathology, dysfunction, and illness but less is known about the nature of positive states (Seligman & Csikszentmihalyi, 2000)

Traditional psychology presents a more negative bias and tends to be more problem-focused (Sheldon & King, 2001; Wright, 2003). Positive psychology offers a different approach to mainstream psychology (Christopher, Richardson, Slife, 2008)) and seeks to research human strengths and virtues with the primary objective of study and intervention to make the individual flourish (Becker & Marecek, 2008; Christopher, Richardson & Slife, 2008; Preskill & Donaldson, 2008; Seligman & Csikszentmihalyi, 2000). Positive psychology emerged at the start of the new millennium as a movement within psychology emphasizing how human strengths can enhance optimal performance and achievement (Seligman & Csikszentmihalyi, 2000). Proponents of positive psychology urge researchers to

adopt a more appreciative perspective regarding human potentials, motives, and capacities (Sheldon & King, 2001). Initially, positive psychology attracted a great deal of interest in the more popular literature; however, it is becoming of interest to those in scholarly psychological research (Becker & Marecek, 2008; Christopher, Richardson & Slife, 2008). This research-based literature is examined in chapter 2.

### *Employer Attitudes*

Older workers are generally perceived less favorably than younger workers and age continues to be a significant factor in employer attitudes towards workers (Hassell & Perrewe, 1995; Finkelstein, Burke & Ragu, 1995; James, Swanberg & McKechnie, 2007; Kite, Stockdale, Whitley & Johnson, 2005; Rosen & Jerdee, 1976b). Shea (1991) asserts that stereotypes, misinformation and biases about older workers permeate and persist in the business world. Despite the lack of research to support a negative age-job relationship (McEvoy & Blahna, 2001; Warr, 1999; Wilkinson & Ferraro, 2004; Wrenn & Maurer, 2004), older job candidates are less preferred and viewed as less suitable (Wilson, Parker & Kan, 2007). These attitudes and biases affect employer selection decisions and older workers continue to be undervalued (Macnicol, 2006; McGoldrick & Arrowsmith, 2001).

### *Ageism and Discrimination*

Research indicates that age is a significant factor in attitudes towards workers and attitudes towards older workers generally tend to be less favorable than for younger workers (Avolio & Barrett, 1987; Duncan, 2001; Finkelstein, Burke & Ragu, 1995; Gringart, Helmes, & Speelman, 2005; Hassell & Perrewe, 1995; Kite, Stockdale, Whitley, & Johnson, 2005; McCann & Giles, 2004; Rosen & Jerdee, 1976a). Studies also show that older applicants are

evaluated less favorably than a younger applicant even though both have the same qualifications ( Avolio & Barrett, 1987; Bird & Fisher, 1986; Finkelstein, Burke, & Ragu, 1995; Gringart, Helmes, & Speelman, 2005; Lahey, 2005; Rosen & Jerdee, 1976a). To understand the impact of age on an employer's decision to hire an older worker, it is necessary to understand what is meant by ageism and age discrimination.

#### *PIES Model*

Human capital, comprised of both explicit and tacit knowledge, is the collective sum of personal attributes, life experiences, knowledge inventiveness, energy, and enthusiasm that employees choose to invest in their work (Luthans & Youssef, 2007). The four subsets in the PIES model (See Figure #4, p. 27), psychological, intellectual, emotional, and social reflect the sum of personal attributes (Peterson & Spiker, 2005). While PIES relates to workers of any age, Peterson and Spiker (2005) argue that older workers are valued less in these categories. The model serves to focus on leveraging the strengths and talents of older workers for organizational success (Peterson & Spiker, 2005). This model aids in the interpretation of the data from the research to link attitudes about older workers and organizational decisions and outcomes.

## CHAPTER TWO: REVIEW OF THE LITERATURE

Due to the demographic breakdown of the workforce, older workers will make up the majority of the workers. This trend will continue for the foreseeable future as the baby boomers age and begin to reach retirement age (AARP, 2000; Albright & Cluff, 2005; Callanan & Greenhaus, 2008; Calo, 2007; Toossi, 2004; Weiss & Maurer, 2004). Attitudes and beliefs impact the behaviors of the employers in making personnel decisions about hiring older workers (Gregory, 2001; Gringart, Helmes, & Speelman, 2005; Weiss & Maurer, 2004). Research is necessary to examine issues of age stereotyping and age discrimination in the workplace. As described in chapter 1, the purpose of this exploratory qualitative case study is to gain a better understanding of employer attitudes concerning older workers and the connections to behaviors and practices supportive of older workers. Ageism and age discrimination continue to be a problem especially for those older workers who are seeking employment and want to reenter the labor force.

### Ageism and Age Discrimination

Research indicates that age is a significant factor in attitudes towards workers and attitudes towards older workers generally tend to be less favorable than for younger workers (Avolio & Barrett, 1987; Duncan, 2001; Finkelstein, Burke & Ragu, 1995; Gringart, Helmes, & Speelman, 2005; Hassell & Perrew, 1995; Kite, Stockdale, Whitley, & Johnson, 2005; McCann & Giles, 2004; Rosen & Jerdee, 1976a). Studies also show that older applicants are evaluated less favorably than a younger applicant even though both have the same qualifications (Avolio & Barrett, 1987; Bird & Fisher, 1986; Finkelstein, Burke, & Ragu, 1995; Gringart, Helmes, & Speelman, 2005; Lahey, 2005; Rosen & Jerdee, 1976a). To

understand the impact of age on an employer's decision to hire an older worker, it is necessary to understand what is meant by ageism and age discrimination.

As defined by Robert Butler in 1968 ageism is the “systematic stereotyping of and discrimination against older people because they are old, just as racism and sexism accomplished this with skin color and gender” (Butler, 1969). Butler (1969) refers to ageism as another form of bigotry which manifests itself in stereotypes, myths, and discriminatory practices. Ageism supports the idea that an individual becomes somehow inferior based on an actual or perceived chronological age. Old age becomes viewed as a kind of disease or affliction (Dennis & Thomas, 2007; Duncan, 2001; Glover & Branine, 2001; Macnicol, 2007). Posthuma & Campion, (2009) further observe that ageism is made up of a set of beliefs, attitudes, norms, and values used to justify prejudice and discrimination based on age. Ageism is believed to contain three components: stereotypes (cognitive aspect), prejudice (affective aspect/feelings) and discrimination (behavioral aspect) (Cuddy & Fiske, 2002; Kite & Wagner, 2002). These set of assumptions about age-based group characteristics are applied to the group and personal attributes are ignored. Individuals are labeled according to negative stereotypes based on group affiliation (Macnicol, 2006; Posthuma & Campion, 2009) and these stereotypes go largely unchallenged or even unnoticed in the U.S. (Cuddy & Fiske, 2002). Ultimately, ageism deprives and older person of status, responsibility, power, and dignity (Duncan, 2001; Glover & Branine, 2001; Nelson, 2005).

Ageism is linked to age discrimination in that these negative prejudices and stereotypes of employers influence decisions towards older workers (Glover & Branine, 2001; Gregory, 2001; Macnicol, 2006; Posthuma & Campion, 2009). Ageism supports

beliefs and expectations that older workers are less mentally and physically able to perform their jobs as compared to younger workers (Callanan & Greenhaus, 2008; Finkelstein, Burke & Ragu, 1995; Gregory, 2001; Hassell & Perrew, 1995; Kite & Wagner, 2002; Posthuma & Campion, 2009; Rosen & Jerdee, 1976a). Employer bias against older workers emerges from ageist concepts (Gregory, 2001) resulting in age discrimination, the behavioral aspect of ageism (Cuddy & Fiske, 2002; Glover & Branine, 2001; Kite & Wagner, 2002). Ageism results in the sub-optimal use of human resources including a poor return on investment in human capital, lack of balance between youth and maturity in the labor force, narrowed talent pool, and knowledge loss (Duncan, 2001).

Macnicol (2007) states that age discrimination in employment refers to the use of 'age proxies' or chronological age in employer decisions to hire, fire, promote, retrain, and implement mandatory retirement and age is a poor proxy for performance (Duncan, 2001). Employers commonly make personnel decisions based on these negative attitudes and assumptions (Gregory, 2001). These actions deny or limit opportunities of the older worker especially in hiring decisions (Gregory, 2001; Posthuma & Campion, 2009). Early research by Rosen & Jerdee (1976b) supports the impact of age discrimination on personnel decisions noting that negative stereotypes led to decisions that adversely affected older workers in terms of employability, promotion, compensation, judgments of performance, and access to training. More recent research confirms rather than dispels the continued stereotyping and discrimination against older workers (Kite, Stockdale, Whitley, Johnson, 2005).

While research has shown that age is a significant factor in attitudes towards workers and that older workers continue to be perceived less favorably than younger workers

(Finkelstein, Burke & Ragu, 1995; Hassell & Perrewe, 1995; Kite, Stockdale, Whitley & Johnson, 2005; Rosen & Jerdee, 1976a), much is still unknown about the role that age plays in the formation of employer attitudes toward older workers. Understanding attitudes and beliefs about the aging work population is important and research is needed to examine the issues of age stereotyping and age discrimination in the workplace (Finkelstein, Burke, Ragu, 1995). In order to gain insight to these stereotypes and attitudes that continue to persist, it is useful to investigate the research that addresses employer attitudes concerning older workers.

#### Older Worker – Employer Attitudes

Research on attitudes towards older workers has spanned five decades and the results remain fairly consistent (Gordon & Avery, 2004). If age barriers in employment are to be confronted and removed, it is necessary to target stereotypical attitudes towards older workers (Taylor & Walker, 1998). The following articles examine these attitudes.

Older workers are generally perceived less favorably than younger workers and age continues to be a significant factor in employer attitudes towards workers (Hassell & Perrewe, 1995; Finkelstein, Burke & Ragu, 1995; James, Swanberg & McKechnie, 2007; Kite, Stockdale, Whitley & Johnson, 2005; Rosen & Jerdee, 1976b). Shea (1991) asserts that stereotypes, misinformation and biases about older workers permeate and persist in the business world. Despite the lack of research to support a negative age-job relationship (McEvoy & Blahna, 2001; Warr, 1999; Wilkinson & Ferraro, 2004; Wrenn & Maurer, 2004), older job candidates are less preferred and viewed as less suitable (Wilson, Parker & Kan, 2007). These attitudes and biases affect employer selection decisions and older workers continue to be undervalued (Macnicol, 2006; McGoldrick & Arrowsmith, 2001).

The interest in attitudes towards older workers is not new. Early research by Kirchner & Dunnette (1954) examined attitudes toward the employment of older workers. Their study suggested that one of the most important factors underlying employment of older workers is the attitudes of management, unions and fellow workers toward older worker value. As early as 1954, the authors report the decrease of older persons in the workforce even though the older workers may want to continue work (Kirchner & Dunnette, 1954). Rosen and Jerdee (1976a) also investigated the nature of job-related age stereotypes and found that older workers were perceived as less desirable and that these biases were quite pervasive among employers. Stereotypes regarding physical, cognitive and emotional abilities were used to make decisions about employability and career progression (Rosen & Jerdee, 1976b). Thirty years after the Kirchner and Dunnette study, Bird and Fisher (1986) replicated the earlier study and found few changes had occurred in those 30 years.

Moving into the 21<sup>st</sup> century, research continues to support that negative biases persist and older workers are viewed as having less potential for development and capacity for performance (Weiss & Maurer, 2004). The consistency of results indicates that certain attitudes are wide spread and entrenched (Rix, 2002). Although the Age Discrimination in Employment Act (ADEA) was designed to mitigate or eliminate harm caused by negative stereotypes about older workers, the outcome seems to be that age stereotypes operate at more subtle levels (Dennis & Thomas, 2007, Grossman, 2003; Johnson, 2007; Posthuma & Campion, 2009).

While not an exhaustive list of research articles, the following table provides an overview of the most commonly held perceptions, both positive and negative, that continue

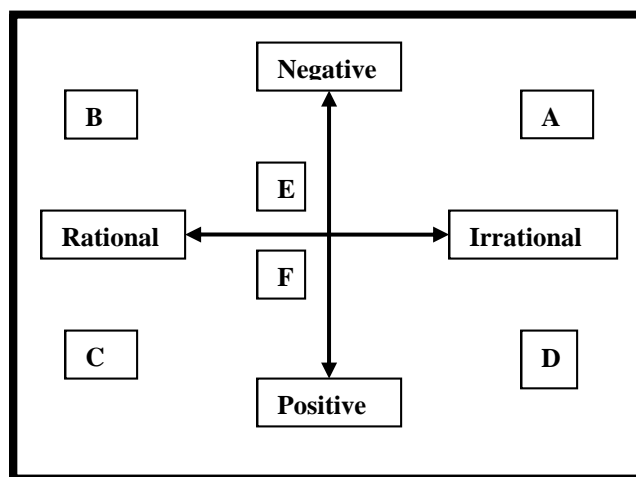
to impact employer decisions about older workers. Most often cited are lack of flexibility, resistance to change, and harder to train (AARP, 2000)

**Table 1: Research Articles: Negative and Positive Attitudes about Older Workers**

| <b>Author - Date</b>              | <b>Negative Attitudes</b>   | <b>Positive Attitudes</b>                                  |
|-----------------------------------|---|--|
| AARP (2000)                       | Resistance to trying new approaches, difficulty learning new technologies, outdated job skills, health & benefit costs, legal implications, more difficult to terminate         | Loyal, dependable, experience                              |
| Albright & Cluff (2005)           | Not creative, not innovative, not as productive as younger workers  |  |
| Bird & Fisher (1986)              | Lower performance capacity and potential for development  | Stability  |
| Callanan & Greenhaus (2008)       | Less mentally and physically capable  |  |
| Finkelstein, Burke, & Ragu (1995) | Slower, less creative, less flexible, resistant to change, disinteresting in training, prone to illness and accidents,  |  |
| Gregory (2001)                    | Stubborn, less productive, less adaptable, difficult to retrain, higher costs, older workers want to retire, short tenure   |  |
| Lahey (2005)                      | Shorter career potential, lack of energy, less flexible or adaptable, higher salary expectations, obsolete knowledge and skills, legal issues, retirement and health plan costs |  |
| McEvoy & Blahna (2001)            | Expensive to employ, less flexible, less energetic, less enthusiastic, not interested in learning   |  |
| Mermin, Johnson, & Toder (2008)   | Lack of creativity, lack of flexibility, unwilling to learn new things  | Knowledge, expertise, reliability, work ethic              |
| Munnell, Sass, & Soto (2006)      | Less creative, less willing to take initiative, less willing to learn new things, less able to perform physically demanding jobs, cost  | Loyalty, work ethic, reliability, experience, collegiality |
| Posthuma & Campion (2009)         | Poor performance, resistant to change, lower ability to learn, shorter tenure, more costly  | Dependable   |
| Rix (2002)                        | Lack of flexibility and adaptability, lack technological competence, not able to learn new technology, costly, not as healthy   | Loyal, dependable, experience, people skills, mature       |
| Rosen & Jerdee (1976a)            | Less employable, less creative, less motivated, less interested in change, less capable of coping with future challenges, less able to perform, lack potential for development  | Reliable, high quality of work, high integrity             |

Table 1: *cont'd*

| Author - Date          | Negative Attitudes   | Positive Attitudes   |
|------------------------|--|--|
| Shea & Haasen (2006)   | Unmotivated, less creative, less productive, lack technological competence, can't adapt to change, hesitant to take risks and make decisions, not able to deal with job related stress | More accurate, high quality of work, sound judgment, experience    |
| Sterns & Miklos (1995) | Harder to train, less able to keep up with technological change, more accident prone, less motivated   | Dependable, cooperative, conscientious, consistence, knowledgeable |
| Taylor & Walker (1998) | Less productive, lack relevant skills, resistant to change and new technology, less trainable, leave employment sooner   |  |
| Weiss & Maurer (2004)  | Slower, less creative, less flexible, more resistant to engage, disinterested in training, prone to illness and accidents  |  |



Source: Duncan, C. (2001). Ageism, early exit and the rationality of age-based discrimination. In Glover, I. and Branine, M (Eds.) *Ageism in Work and Employment* p. 36.

Figure 3: *Typology of Age-based Employer Policies Towards Older Workers*

Duncan (2001) classifies age-based discrimination attitudes into the following categories:

- A. negative-irrational: policies which discriminate against older workers and are commercially damaging (discrimination against older workers with respect to recruiting, training, promotion, and other personnel policies)
- B. negative-rational: those which treat older employees unfavorably but make commercial sense (when job reductions are required, terminate older workers who are more expensive)
- C. positive-rational: policies favorable towards older workers and are commercially rational (respond to labor supply difficulties by recruiting from displaced older workers),
- D. positive-irrational: policies that favor older workers but judged irrational from a business perspective (employing too many older workers may result in poor labor mix).

The first category represents the most common attitudes towards older workers and is supported by Table 1. Despite an expanding body of knowledge concerning age and job performance, discrimination with respect to employment continues (Finkelstein, Burke & Ragu, 1995; Sterns & Miklos, 1995). These attitudes and practices endorse a deficit model of aging and are held to have little basis in facts (Duncan, 2001); however they continue.

Past research takes a negative psychological approach focusing on what is wrong and the problems associated with older workers (Peeters & Emmerik, 2008, Peterson & Spiker, 2005). Age stereotypes supporting negative employer attitudes continue to persist; however,

there are recent studies that suggest that a shift in focus from weakness and threats to strengths and opportunities may help to alter these attitudes (Peeters & Emmerik, 2008; Peterson and Spiker, 2005). Can a positive perspective alter attitudes and encourage employers to adopt an inclusionary bias rather than an exclusionary bias? The following studies introduce positive psychology as an approach that redirects the focus from what is negative to what is positive about older workers.

### Positive Psychology

Positive psychology has become an inclusive term for the study of positive emotions, positive characteristic traits, and enabling institutions (Seligman, Steen, Park & Peterson, 2005). According to Seligman positive psychology has three primary goals: 1. delineate and measure positive traits; 2. promote positive experiences and emotions; and 3. create more positive communities and institutions that will promote strengths (Seligman, 1999). Peterson and Park (2006) classify positive traits by first identifying six broad virtue categories and then classifying character strengths within these categories. The first of the six is wisdom and knowledge which includes creativity, curiosity, open mindedness love of learning and perspective. The second is courage and includes bravery, persistence, integrity and vitality. Humanity, the third virtue consists of love, kindness and social intelligence. Fourth is justice and encompasses citizenship, fairness and leadership. The fifth virtue is temperance which embraces forgiveness and mercy, humility and modesty, prudence and self regulation. The final virtue is transcendence focusing on appreciation of beauty and excellence, gratitude, hope, humor and spirituality.

Seligman and colleagues state:

*Research findings from positive psychology are intended to supplement, not remotely to replace, what is known about human suffering, weakness, and disorder. The intent is to have a more complete and balanced scientific understanding of the human experience – the peaks, the valleys, and everything in between. We believe that a complete science and a complete practice of psychology should include an understanding of suffering and happiness as well as their interaction, and validated interventions that both relieve suffering and increase happiness – two separable endeavors (Seligman et al., 2005: 410)*

Positive psychology seeks to create a more holistic picture of human and organizational life, to look at the tension between positive and negative states and to be broad and future-oriented (Seligman, 1999; Youssef & Luthans, 2007). This approach focuses on three areas of human experience: positive subjective states, positive individual traits, and positive institutions (Roberts, 2006). The mission of positive psychology is to build theoretical understanding through scientific methodology to discover and promote the factors that allow individuals, groups, organizations, and communities to thrive and prosper (Luthans, 2002).

Much of the focus of positive psychology has been on the individual with the goal of helping people achieve an optimal level of functioning in order to flourish (Macdonald, Bore, Munro, 2008; Preskill & Donaldson, 2008). Recently, interest has grown in theory building, research, and application of positive psychology to organizational behavior and the organizational setting (Luthans & Youssef, 2007). Although positive psychology research as it applies to the workplace is at present scarce (Wright, 2003), there are two major

developments that seek to link positive psychology to the workplace, positive organizational behavior, POB, (Luthans, 2002) and positive organizational scholarship, POS, (Cameron & Caza, 2004). Both of these are examples of a move away from the deficient-based framework to a strength-based or optimal functioning conceptual orientation. (Preskill & Donaldson, 2008).

Luthans (2002) defines positive organizational behavior or POB, as “the study and application of positively oriented human resource strengths and psychological capacities that can be measured, developed, and effectively managed for performance improvement in today’s workplace.” POB draws from positive psychology focusing on specific strengths and psychological capabilities: confidence/self-efficacy, hope, optimism, subjective well-being/happiness, and emotional intelligence or CHOSE (Luthans & Youssef, 2007). POB seeks to understand and quantify the impact of CHOSE on desired work-related employee outcomes including performance, job satisfaction, work happiness, and organizational commitment (Andrew, M, 2004/2005; Youssef & Luthans, 2007).

Employees tend to be viewed as important to the organization to the extent they fulfill organizational goals (Wright, 2003). Rather than consider employees as a means to a desired end POB seeks to emphasize strengths and capabilities and how these in turn help the individual as well as the organization prosper. (Luthans, 2002; Wright, 2003). Management scholars and practitioners often take a negative perspective and try to fix what is wrong and concentrate on weaknesses. POB with its link to positive psychology emphasizes employee strengths rather than weaknesses and emphasizes not what is wrong but what is right with people (Luthans, 2002).

The second link to positive psychology and the workplace is positive organizational scholarship, POS. In this new field of study, POS centers on the dynamics of leading individuals and organizations to exceptional performance by developing human strengths, producing resilience and restoration, and fostering vitality (Cameron & Caza, 2004; Roberts, 2006). While POB focuses on developing human resource strengths, POS seeks to add to organizational theory by exploring positive dynamics and positive outcomes in organizations and the processes that produce them (Cameron & Caza, 2004). POS supports applying positive psychology to a wider set of organizational issues (Roberts, 2006).

Cameron & Caza (2004) explain that positive refers to an affirmative bias towards positive processes and dynamics in organizations. Organizational includes processes and conditions occurring in and through organizations, especially taking into account the context in which positive phenomena occur. Finally, scholarship is the scientific, theoretically based, and rigorous investigation of positive phenomena. While POS has a bias towards positive phenomena, it does not ignore the presence of negative, challenging, or contrary aspects within organizations (Cameron & Caza, 2004; Roberts, 2006). The POS lens asks that research move from describing what is problematic to explore the mechanisms that enable human flourishing. The interest shifts from overcoming problems to finding out what is going right in an organization and what can be learned from these examples of individual and organizational flourishing (Cameron & Caza, 2004; Roberts, 2006).

Roberts (2006) does point out concerns with positive psychology and positive organizational scholarship.

1. Description – POS may create misperceptions by ignoring problems, inequities, and deficits.
2. Prescription – POS may be used to inappropriately prescribe behaviors that generate profit by exploiting employees' good will.
3. Aspiration – POS may create unrealistic expectations for excellence and perfectionism that can, over time, undermine performance and well-being.

Both POB and POS support the positive psychology perspective of focusing on the strengths and talents of individuals, including older workers, and implications for organizational success. As Ranzijn (2002) suggests, a paradigm shift in attitudes to older people is required, towards viewing them as a valuable resource rather than a burden. This applies to older workers in the workplace. Often, the attitudinal barriers based on stereotypes are at the heart of preventing participation of older individuals within organizations (Gringart, Helmes, & Speelman, 2005; Ranzijn, Carson & Winefield, 2004). The emerging field of positive psychology may help to illuminate ways to reduce these attitudinal barriers.

An interesting approach to the problem of negative attitudes toward older workers is presented by Peterson & Spiker (2005). Drawing upon the positive psychology perspective and linked to both POB, human resource strengths and psychological capacities (Luthans & Youssef, 2007) and POS, positive outcomes and the processes that produce them (Cameron & Caza, 2004; Roberts, 2006) these authors explore changing attitudes towards older workers by focusing on their positive contributory value to the workplace (Peterson & Spiker, 2005). Rather than follow the traditional negative psychology or deficit approach that continues to research the myths and stereotypes through the premise that there is something wrong with

older workers (Ranzijn, Carson & Winefield, 2004), Peterson and Spiker (2005) center their attention on the strengths and talents of older workers for organizational success. The question becomes not whether older workers have value, but what they bring and why they are not recognized for bringing it. (Peterson & Spiker, 2005; Ranzijn, 2002)

Human capital, comprised of both explicit and tacit knowledge, is the collective sum of personal attributes, life experiences, knowledge, inventiveness, energy, and enthusiasm that employees choose to invest in their work (Luthans & Youssef 2007). Peterson and Spiker (2005) suggest that human capital contains four subsets: psychological, intellectual, emotional, and social (PIES). These combine to determine the contributory value of a worker. While PIES relates to workers of any age, Peterson and Spiker (2005) argue that older workers are valued less in these categories than younger workers.

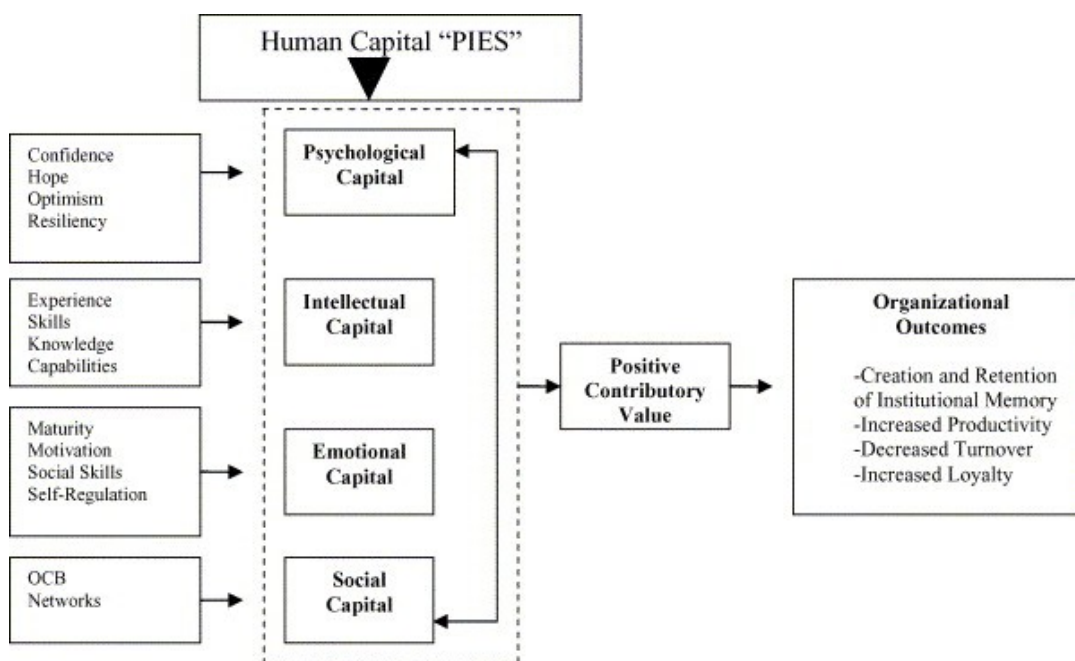


Figure 4: A Model of Positive Contributory Value (Peterson & Spiker, 2005, p. 157)

Peterson and Spiker (2005) explain how the above model serves to focus on leveraging the strengths and talents of older workers for organizational success and that older workers may contribute equal if not more value than younger workers due to increased human capital. The combination of psychological, intellectual, emotional, and social capital determine the positive contributory of a worker and these should continue to increase with experience and time. Included are factors such as the traits one brings to the job, one's ability to learn, and one's motivation all contributing to human capital. The model suggests that creating positive contributory value will result in positive organizational outcomes (Peterson & Spiker, 2005).

There are researchers who feel the need to be more cautious before accepting positive psychology as superior to the traditional approach. Becker and Marecek (2008) note the relationship of positive psychology to a number of popular earlier movements embracing individualism and an ethos of adjustment. They suggest the need to take a more holistic view rather than moving towards a new movement in psychology. Otherwise, positive psychology may become nothing more than a passing fad (Becker and Marecek, 2008). Fineman (2006) also voices concern when he responds to Roberts (2006) about positive organizational scholarship and suggests that a more critical approach is needed. There is a link between the positive and negative dynamics in psychology and positive studies should recognize both rather than accept one over the other (Fineman, 2006).

The positive psychology approach may bring about a change in employer attitudes about older workers. Those who support this approach are careful to recognize the need for continued research in order to develop theory to explain and understand the importance of

positive psychology in the workplace setting (Peterson & Spiker, 2005; Ranzijn, Carson, & Winefield, 2004; Roberts, 2006). Seligman (1999) first introduced positive psychology in 1998 making this approach relatively new and without a great deal of supportive research. Proponents understand that it may be too early to tell if this approach will be instrumental in evoking change in attitudes about older workers (Peterson & Spiker, 2005). They also realize the need to build theoretical understanding and use scientific methodology to discover and promote the factors that allow individuals, groups, organizations, and communities to thrive and prosper (Luthans, 2002).

As noted earlier, research over the past fifty years has done little to change employer attitudes about the desirability and value of older workers. The literature reveals the consistency of negative attitudes and the outcomes resulting from these attitudes. Advocates of positive psychology understand that more research is needed; however, they are optimistic that this approach could result in a win-win situation for both employers and older workers.

## CHAPTER THREE: DESIGN AND METHODOLOGY

### Design

Qualitative research is particularly appropriate when a complex, detailed understanding of an issue is required. It explores and attempts to understand a group or phenomenon which often results in new findings or theories (Baxter & Jack, 2008). Research is achieved through exploratory, inductive procedures and emphasizes process instead of ends (Merriam, 1998). Creswell (2003) defines five qualitative approaches: 1. narrative researcher focusing on studying one or two individuals; 2. phenomenological research focusing on the meaning of an experience for a number of individuals; 3. grounded theory research moving from description to generate or discover a theory; 4. ethnographic research describing and interpreting the characteristics of a culture-sharing group; and 5. case-study research involving the study of an issue explored in one or more cases, bound by time and place, using in-depth data collection with multiple sources of information. An exploratory multiple case study strategy is chosen for this study in order to examine in depth and in a holistic manner the situation under investigation.

A qualitative case study is particularistic in that it focuses on a particular, specific situation, event or phenomenon. It is descriptive and provides insight into the phenomenon under study (Creswell, 2003; Merriam, 1998). Case studies focus on insight, discovery, and interpretation rather than hypothesis testing, numerical data, and statistics. Eisenhardt (1989a) notes that the case study tries to illuminate a decision or set of decisions, why they were taken, how they were implemented and with what result. Case studies also provide contextual analysis of a limited number of events and their relationships. The case study

design tends to emphasize exploration rather than prescription or prediction (Baxter & Jack, 2008). By seeking to understand as much as possible about a single subject or small group of subjects, case studies tend to be rich with description.

Stake (1994) discusses the major conceptual responsibilities of the qualitative case study researcher:

1. bounding the case
2. selecting phenomena, themes, or issues
3. seek patterns of data
4. triangulating key observations
5. selecting alternative interpretations
6. developing assertions or generalizations about the case

The case becomes the unit of analysis in order to analyze attitudes of the employers towards older workers, specifically whether these attitudes follow the path of negative or positive perceptions. This research employs a multiple-case study strategy. Three cases will be examined and the differences within and between cases will be explored. Multiple or collective case studies allows the researcher to analyze within each setting and across settings (Baxter & Jack, 2008)

### Participant Selection

This study investigated the attitudes towards older workers expressed by employers in organizations that exhibit positive practices and behaviors and implement policies to recruit, hire and retain older individuals. The sampling strategy, generally used in qualitative research, is purposive rather than random. This strategy provides the opportunity to explore

specific phenomenon based on criterion-based case selection for in-depth study (Creswell, 2003). The purpose for this approach is to shed new light upon a specific problem/phenomenon and consequently uncovering new knowledge (Marshall & Rossman, 1999; Mason, 1996).

There were two phases of participant selection: 1) selection AARP awarded organizations; and 2) selecting the interviews from each organization. The three organizations selected for this study have been recognized by the American Association of Retired Persons (AARP) as best employers for workers over 50. Since 2001, AARP has recognized more than 130 companies and organizations as best employers for workers over 50. The Best Employers program awards employers whose best practices and policies address the issues of an aging workforce. The AARP awards are based on recruiting practices, opportunities for training, education and career development, workplace accommodations, alternative work options, employee health and pension benefits, retiree benefits and support of age diversity in the workforce. These companies seek qualified employees of any age and recognize that older workers represent an important and growing segment of the qualified labor force they seek (AARP, 2008).

The researcher reviewed the list of all organizations that had received the AARP award initiated in 2001 and decided, due to time and financial restraints, to select organizations located within North Carolina. The chair of the Aging Workforce Group within UNC's Institute on Aging suggested contacting the head of NC's AARP who would be able to assist in the selection process. The researcher contacted the head of North Carolina's AARP to help in identifying and recruiting organizations to participate. There were five

organizations located in North Carolina who had received the AARP award. After reviewing all five of these organizations and based on NC AARP's recommendations, three were selected as cases for the study.

The study focused on three organizations that were recognized in the last three years by AARP as a best employer for workers over 50. Each employer has specific recruiting strategies targeting older job-seekers. All three organizations are located in North Carolina and represent three different industry sectors: not-for-profit, hospital/health care, and insurance. The percentage of employees age 50+ working within these organizations range from 22% to over 40%. There is at least one employee responsible for retiree relations.

The second phase of recruitment involved identifying the most appropriate person from each organization to answer the interview questions. The head of NC AARP suggested initial contacts and offered an introduction to the organizations. The researcher called the contacts, described the study and explained why this organization had been selected (Appendix B). The contact identified the most appropriate person to be interviewed. The researcher asked for the exact name, title, address and phone number and called the person recommended. After explaining the study, contacts were asked to participate. If he/she agreed, the researcher followed up to set up an exact time and place for the interview.

Participants interviewed for the study included the president of one organization, the head of Human Resources in another, and the head of staffing in the third. All three were tenured employees of their organization and were heavily involved with applying for the AARP award. Each participant expressed interest in the study and a willingness to help in any way to provide information and answer interview questions.

## Trustworthiness

Precision and accuracy are important in research measurements (Babbie, 2004). Trustworthiness requires presenting and conducting the research in a way that the reader can believe or trust the results and possesses an embedded set of evaluation criteria closely related and interdependent: credibility, transferability, dependability, and confirmability (Bailey, 2007).

Both reliability and validity are of primary importance in research and qualitative researchers recognize this importance and must address these concepts a bit differently. Reliability is a matter of whether a particular technique, applied to the same objects, yields the same results each time (Babbie, 2004). Validity refers to the extent that research findings are congruent with reality and reflect what it is intended to measure and that the measure accurately reflects the concept (Babbie, 2004; Merriam, 1998). Merriam argues that “one assumption underlying qualitative research is that reality is holistic, multidimensional, and every changing; it is not a single, fixed, objective phenomenon waiting to be discovered, observed, and measured as in quantitative research” (1998, p. 202). Qualitative research must protect research integrity, use words or pictures and try to interpret what really happened and overcome bias (Creswell, 2003). To ensure findings that are congruent to reality (internal validity) as well as consistent and reproducible (reliability), the following techniques are assumed:

1. Triangulation - incorporates the techniques using multiple sources of data to develop a holistic and plausible explanation of data (Richards & Morse, 2007). Triangulation serves to clarify meaning by identifying different ways

the phenomenon is being seen (Stake, 1994). Exclusively relying on one method may bias or distort the research picture of the holistic view of reality being researched. The more methods used to contrast with other, the greater the researcher's confidence about the findings. The use of multiple data-collection methods help ensure the trustworthiness of the data. The researcher in this study used semi-structured interviews, observations, and documents to contribute towards the validity of the study.

2. Member Checks - taking the data and the tentative interpretation back to the informants to check if the data collected are objective and represent them or their ideas accurately (Glesne, 1999). This study employed member checks as another way to contribute towards validity.
3. Cross Case Analysis – multiple site analysis involves collecting and analyzing data from several sites. Multiple case analysis can “lead to categories, themes, or typologies that conceptualize the data from all the cases; or it can result in building substantive theory offering an integrated framework covering multiple cases” (Merriam, 1998, p. 195). Three sites provide the data for this study. Comparing and contrasting three different cases strengthened the trustworthiness of the common themes emerging from analysis.
4. Thick Description – a detailed description of the research data so the readers are allowed to enter the research context (Creswell, 2003; Glesne, 1999). This study provides detailed descriptions in chapters 2 and 5.

5. Researcher's Bias – clarify the bias the researcher brings to the study. This self-reflection creates an open and honest narrative (Creswell, 2003). This study includes the subjectivity statement.

### Data Collection

Six sources of evidence for cases studies were identified by Stake (1994) and Yin (2003) and include documents, archival records, interviews, direct observation, participant observation and physical artifacts. The main approaches adopted for this study to gather data were semi-structured interviews, observations and documents. These approaches support exploring the meaning of events and processes, gain entry into the world of the participants and build an understanding of human perceptions and behaviors in these cases.

#### *Interview*

The interview is a most commonly used approach of data collection in qualitative research and constitutes a major part of data collection for this study. The interviews conducted are semi-structured interviews. In the semi-structured interview, the interviewer asked predefined questions; however these question are open-ended providing the freedom for the interviewee to talk and add stories or comments. The lived experience and insights of the interviewees are released through the interview while the researcher has the opportunity to gain access to the world of the individual and his/her perspective (Stake, 1994). This type interview is most appropriate when the researcher knows enough about the phenomenon or issues to frame the discussion and wants to elicit views and opinions from the participants (Creswell, 2003; Richards & Morse, 2007).

For this study, open ended question were developed in advance (Appendix C). Probes also elicited further information and were unplanned arising from the context of the interview (Richards & Morse, 2007). The same questions are asked of all participants but not necessarily in the same order. The interviews were tape-recorded and transcribed in preparation for the analysis. Transcriptions were completed by the researcher.

### *Observation*

Observations in qualitative research are classified as either participant or non-participant observations and differ in visibility and involvement of the research in the setting (Richards & Morse, 2007). For this study, non-participant observation is more appropriate since it tries to avoid intruding on the settings or having a relationship with the subjects (Creswell, 2003; Richards & Morse, 2007). Researchers gain an understanding of the issues and events with the eye of an outsider (Richards & Morse, 2007). For this study, the researcher took field notes on the behavior and activities of individuals and noted the actual site surroundings during site visits.

### *Documents*

Data may consist of documents that exist independent of the research process. Documents are mainly text-based; however visual data may also exist such as graphics, photos, film, video, etc. and are considered a meaningful and appropriate research strategy (Richards & Morse, 2007). Creswell (2003) notes that there are advantages as well as limitations to data provided by documents. Documents contain the language and works of the participants, are an unobtrusive source of information, represent data that has been compiled carefully by participants and save the researcher the time and expense of transcribing. The

review of documents is an unobtrusive method, rich in portraying the values and beliefs of participants in the setting (Marshall & Rossman, 1999). The research must also be aware that certain documents are protected and that they may be incomplete or inaccurate. For this study, documents were collected such as recruitment materials, online documents of policies and benefits and articles and newsletters. Often, the newsletters highlighted or supported employers' positive attitudes about employees, especially those over 50.

#### Ethical and Political Considerations

Interviews as well as observations require that the researcher enter the environment of the group being studied. It is important to be sensitive to privacy issues, maintain IRB compliance (Appendix A), as well as understand the role of the researcher in these privileged relationships. Those participating in the interviews should be assured that the researcher will make every effort not to invade his/her privacy and will make every effort to keep the questions focused on the issues. Participants were provided the opportunity to review transcripts of the interviews and make changes if clarification was needed.

Information from the study was kept confidential and securely stored in computer files that are password protected. Results from interviews and observations were not connected to the participants' or organizations' identities. Real names of participants or the organizations were not used. No reference was made in oral or written reports that link participants to the study. Any audiotape files were stored in a locked cabinet and identifiable organizational information kept separate from tapes. The audiotapes, recorded on a small hand held tape recorder, were destroyed at the end of the study.

Those interested in this research may include the general public, policy makers and groups interested in the aging population and employment issues. Important to employers are ramifications associated with age discrimination covered by the Age Discrimination in Employment Act. While research should contribute to theory and practice, it is not intended to place unreasonable burdens on the participants. The researcher was aware of these issues and guarded against presenting information that would put participants at risk.

#### Data Analysis Procedures

The interviews, lasting an hour each, were the main source of data for the study and were analyzed using the following approach.

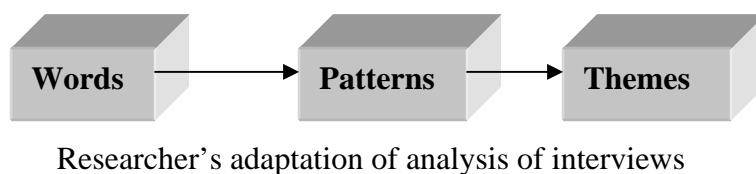


Figure 5: *Data Analysis/Developing Themes*

Words and phrases from the interviews are indexed or coded to create patterns. These patterns, in turn lead to overarching themes. Finally, data from the interview are compared to observations made by the researcher at the site and to documents provided by the organization as well as from the organization's Web site. Components from Peterson and Spiker's (2005) PIES model and Duncan's (2001) model of rationality of age-based discrimination provided the approach for the data analysis.

As described in chapter 2, the PIES Model considers human capital as four subsets: psychological, intellectual, emotional, and social (Peterson & Spiker, 2005). This study used these four subsets to understand the different ways that older workers add value in the workplace. While the value of ALL workers could be understood using this model, this study focused on older workers. Other studies focusing on older workers often focus on the negative: how to overcome negative stereotypes of older workers. In the study, the tables were turned and the positive contributions of older workers were examined in three organizations that have positive attitudes (proxy: winning the AARP award) for those workers. This PIES model tries to explain how behaviors evolve and to clarify the relationship between an organization's positive attitudes leading to positive outcomes for the organization as well as employees.

The PIES model informed the development of the research questions in that the questions focused on the positive contributions of older workers. Further, the model guided the analysis of the interview data, documents, and field notes. The four subsets were used as sensitizing constructs during the analysis; in other words, the four different types of contributions were identified in the data and used to understand the different ways that the data described the value of older workers. The value ascribed to older workers at the organizations will be described in chapter 4.

### Significance of the Study

Despite the emphasis on the importance of older workers to current and future labor markets, relatively little is known about the ways employers' attitudes, policies and practices influence older worker recruitment and retention. Relatively little research explores the

interaction between managerial attitudes and practices. Research tends to maintain parallel paths and focus on either attitudes or practices (Loretto & White, 2006). This limits the understanding of the relationships between attitudes and practices. The aim of this study was to address gaps in knowledge and understanding through an in-depth qualitative analysis of employer attitudes and practices towards older workers. This study sought to capture detail and contribute to the literature on attitudes and practices of employers toward older workers. Because this is an under-researched area, the study is exploratory and purposive sampling was used to focus on ‘good’ organizations, to learn about the connections between ‘good’ attitudes and ‘positive’ organizational behavior towards older workers.

#### Limitations of the Study

The qualitative method used is a case study design which is descriptive and does not seek to provide a cause-and-effect relationship between attitudes and behaviors. Attitudes and behaviors can be described and examined but not necessarily explained. This study is confined to three organizations in North Carolina and does not represent all organizations. The findings from this study may not be transferable to other settings. In a case study, the researcher interprets and makes judgments about the data which may mean that research results are not completely objective. Every effort has been made to ensure trustworthiness of the analysis process and to present the data to support the findings.

#### Subjectivity of the Study

In qualitative research the researcher becomes part of the study and it becomes important to have an understanding of this individual because she essentially becomes an instrument within the study (Glesne, 1999). As described briefly in chapter1, the author of

this study is a master's student majoring in adult education-human resource development in the Department of Leadership, Policy and Adult and higher Education. Her research focuses on employer attitudes towards older workers and emphasizes a positive approach by focusing on the contributory value of older workers. A positive approach may influence employer attitudes and behaviors.

This area of research is of specific interest to the author since she is considered an older or mature worker and has experienced first hand these negative attitudes when trying to reenter the workforce. However, the researcher feels that she has been able to approach the research objectively and has not allowed personal experience to unduly influence data collection and analysis. The focus is on the value of older workers and employer attitudes and practices that are supportive of the aging workforce, not personal experiences. The research helps the author understand that there is an opportunity to help bridge the gap through an unbiased approach that investigates the relationship of attitudes and outcomes.

## CHAPTER FOUR: FINDINGS

The first section of the results presents an overview of the organization followed by interview synopses of the three case studies. Four themes surfaced from the patterns recognized in the interviews from each case study. They are: (1) Positive business benefits resulting from the AARP award, (2) Good business sense to hire and retain older workers, (3) Age neutral practices and (4) Importance of a supportive culture. After a brief introduction to the organizations, each theme is discussed using the interviews to support the themes.

The connection between the human capital described in the PIES model and the four themes that emerged from the interviews do support each other though not in a one-to-one relationship. Combining theme 1 and 2, older employees are contributing to positive, successful business results. Knowledge and skills along with maturity, pride in the organization and loyalty all contribute to success. While all three organizations strongly supported age neutral practices, they did note that policies and benefits often encourage the retention of skilled employees. Finally, culture is important and both employer and employee are involved in developing the organizational culture. Inclusiveness, participation, and respect were at the heart of the culture of each organization. In response to this supportive culture, employees exhibited positive organizational behavior, important to business success.

### Organization Profiles

Each of the case study organizations is described, to the extent possible, in terms of industry context, practices towards older workers, language used to describe these practices, policies that may impact what they are trying to do, organizational culture and leadership supporting older workers and barriers encountered in hiring older workers.

*Organization A: Interviewee – John*

This organization is a not-for-profit and began in 1936 in a two-room shop with six workers. Today, it is the single largest employer of people who are blind or visually impaired and is a nationally relevant and self-sustaining business that serves prominent customers with interests around the world. Another group employed by this organization is disabled veterans. In 2009 Organization A appeared on AARP's list of Best Employers for Workers Over 50. Forty-two percent of all workers are age 50 and older.

John, upper management and sighted, responded to the interview questions. He has a thorough understanding of the mission and goals of the organizations and had close involvement with the decision and preparation of the application to AARP. However, he is quick to note that this was a group decision involving the organization as a whole.

*Organization B: Interviewee – Marla*

Organization B is an insurance company with more than one-fifth of the company's employees (22 percent) age 50 or older with an average tenure in the company of twelve years. For seventy-seven years, it has served customers by offering health insurance. This organization received AARP's award in 2008 and 2009.

At the time of the interview, Marla recently took over the responsibility for the staffing of the organizations. She expressed the importance of creating an atmosphere and environment that is supportive of all employees.

*Organization C: Interviewees – David and Susan*

Organization C is in the hospital/health care industry. In 2007, this organization ranked 31<sup>st</sup> on the AARP Best Employers for Workers Over 50 list. Although there are some

programs that are unique to workers over fifty, the core values of the organization, diversity, inclusion and respect apply to all employees and drive how these employees are treated.

David and Susan represent upper management in Human Resources. This organization is part of a larger system and the decision to apply for the AARP award came from HR for this particular organization. Both are well aware of the importance of offering benefits and supporting policies that will attract health care professional to the organization.

#### Interviews

Using the four interview questions, the following results from the interviews are organized using the four themes that emerged.

##### *Theme # 1: Positive Business Benefits Resulting From AARP Award*

The application process for the AARP award is lengthy and involves time and commitment for completion. Each organization clearly expressed that one way to stay competitive is to make jobs attractive to qualified and skilled workers, regardless of age. They also spoke of both the internal and external benefits from being selected by AARP.

##### *Organization A*

John enthusiastically agreed to participate in the study and prepared for the interview by reviewing the interview questions (Appendix C) and providing brochures and descriptions of benefits/policies that would help in the study. When we met at the site, he gave me a tour of the facility and introduced me to several of the employees. One of his first comments while being audio recorded is that the award has been worth the effort for many reasons, many of them from a business point of view.

A main point that became a thread throughout the interview is that the award provided “an excellent tool to be able to reach a group of individuals that are over 50 and who are also visually impaired or blind.” Since this organization serves a specific group of people, it is important that those people are aware that these services are available and the organization is able to align itself with individuals who will become employees. While employees are producing a product, the main function of the organization is to provide a workplace for these people.

“Instead of having to go through the traditional route of convincing people about what a good organization we are, we have an objective, qualified organization who says that if you work with this organization, you are going to work at a good place.”

The AARP award has not only made us more visible to the people we want to employ, but also it has brought us national recognition. Most important, we are receiving awareness within our own community. Both internally and externally, the business of this organization has been strengthened through the award and through the association with AARP. It is a strategy that has benefited this organization and has become a good marketing tool.

#### *Organization B*

As with all the interviews, a copy of the questions and description of the research were sent to Marla so she would be prepared and understand what the study was about. She was interested in the research and was very positive about the organization and took pride in the fact that along with a number of awards and recognitions, AARP had recognized this organization for the attention paid to workers over 50.

From a compliance perspective, Marla mentions that the organization is well aware of need for compliance with the guidelines; however, this organization is truly an equal opportunity employer. The business benefit of hiring the best person for the job is part of the success strategy for the organization.

A key reason to apply for this award is to show the total package of what the organization offers beyond benefits and training. We asked, “What are we doing within the organization that we want to display to the public?” This not only includes external visibility but also responds to the internal feedback from employees who wanted to showcase the organization he/she is part of. We have benefited from a recruitment and retention perspective.

“The way you’re viewed is important and this recognition has gained for us “good will” from employers, customers and vendors. Since we have received the award, I think we have good will with a lot of organizations that would typically view us as merely a health insurer and not as a great employer. Awards we have received, not just the AARP award, add to our recognition as being a good employer both locally and nationally. It drives how we are valued.”

From this interview the concept of good will towards the organization and the importance it holds reflects the organization’s understanding of how this can be a valuable asset to the success of the business. Although this may or may not have been considered initially when applying for the award, the outcome offers the organization a positive incentive to continue, as part of its strategy, to build both internal and external good will.

*Organization C*

David and Susan represent upper manager in the HR Department and have an insightful understanding of the how the AARP award benefits the organization. David stated early in the interview:

“One of the things when we were looking at AARP was we wanted to see a benchmark measure and be able to compare ourselves nationally with how we were doing with that cohort bracket. What really drove us was the combination focusing internally on improving the work culture, but we also externally wanted a little benchmark comparison and we felt this would be a good avenue to pursue that.”

One of the benefits provided by AARP is comparing your organization to other applicants in order to help the organization understand how it measures up to all applicants as well as other applicants in a specific industry. For Organization C, this is important in the benchmarking process and has proved fruitful. Also, there is value from a recognition standpoint for marketing and establishing a brand name.

In an industry such as health care, there is often a lack of skilled workers, especially nurses. David addresses how the award may help in this area:

“We’re always trying to come up with strategies for how we can try to retain them (nurses) from a business standpoint. The supply and demand equation for a lot of critical positions in healthcare, especially nurses, is difficult. We are forcing ourselves to do everything we can to develop strategies and initiatives to retain these experienced workers. We are always trying to retain talent. The internal impact has resulted in a sharper focus on

what needs to be done. Externally the impact has been a real plus as far as recruitment. Most important, the award helped to validate that our best practices are of value to the worker.”

*Theme # 2: Good Business to Hire and Retain Older Workers*

These organizations realize that the award has resulted in a number of business benefits such as national recognition in the marketplace, local recognition in the community and access to over 40 million AARP members. Along with these benefits for the organization, there is also the realization that it is also good for business to hire and retain older workers. Here, the study draws upon the PIES Model (Peterson and Spiker, 2005) and focuses on the positive contributory value of the older worker to the organization and Duncan’s (2001) identification of the organization that sees the positive-rational value of the older worker.

*Organization A*

John noted that these individuals are accustomed to working with and helping others which feeds the organization and helps it grow and be successful. The qualities of the older worker “feed into our overall strategic plan and corporate culture and we find them to be a huge asset to our organization.” The older workers tend to value face-to-face communication which helps the organization focus help to make sure everyone is on the same page. For the most part, they have a “get it done” attitude. Also, they have gone through a maturation process that makes them an asset. These are capable individuals who help the organization grow.

“I really feel that this particular group uses tone and context to translate what is trying to be accomplished as a goal. They want to make sure that by the time our conversation is

over we both have a complete understanding of what is going forward and the tone and text of how that information is translated.”

*Organization B*

Marla remarks, “If you are 50 or over that does not mean that you are not able to make a significant contribution to the organization. Their knowledge and skill are of great value to the organization and we value that knowledge.” She elaborates on the value of the older workers knowledge:

“One of the things I can honestly say about the older worker in our organization is the knowledge and skills they bring to the table are hard to come by. It is hard to go out and acquire the knowledge from someone who is younger. I’m not saying the young person cannot get up to speed and this knowledge cannot be transferred, but the history behind why decisions have been made, how the industry has evolved and how health insurance works is the knowledge the older worker possesses and is of great value to the organization.

*Organization C*

David mentioned earlier that an important strategy for the organization is to retain workers, especially older workers who are critical to the continued success of the organization. “We are always trying to retain the talent we have.” For the health care industry, it is a balancing act and it is important to implement benefits and training to keep these skilled workers who have been part of the organization. “Not only do these older workers have a great deal of knowledge and skills, they seem to exhibit even greater internal performance and desire to make the organization successful.”

*Theme # 3: Age Neutral Practices*

Each organization strongly expressed that recruitment, retentions, and access to benefits and training are not dictated by the age, race, or gender of the person. While older workers exhibit certain strengths that are beneficial to the organization, the organizations consider that the decisions made concerning employees are age neutral. Workers over 50 do not get preferential treatment but fair treatment.

*Organization A*

To work with this organization, the employee is blind or visually impaired and it is important to choose the best person for the job regardless of age.

“For us, there are always visual signs that someone is blind or old. Bur for us, it comes down to getting the job done and who can get the job done. Whether you are 50 or 15 is not important as whether you can do the job. All are treated the same, have the same benefits, and are encouraged to speak up. For us, it comes down to the merit and quality of each person.”

*Organization B*

Early on, Marla explains that “we are always looking for the best person for the job so we bring in the best person for the job and the person who can really bring a different aspect to the organization whether that be through their experiences, different way of thinking, or different cultures.” As part of this outreach, the organization makes a concentrated effort to make sure that job postings are far reaching and able to reach diverse populations. As further support of the age neutral approach, Marla describes the hiring process.

“In all my years of being a staffing person at this organization, I have never encountered a manager or any leader who has discussed age when it came to a candidate. We try to make our recruitment process as non-biased as possible. We truly try to hire the best talent and we are very sincere about that.”

#### *Organization C*

David is quick to state that all employees, including workers over fifty, are treated equally and have access to all benefits, training, etc. that the organization offers. He states, “It is not like those over fifty get special treatment. They get important treatment as does every employee of different race or gender.” All employees have the opportunity for development and promotion within all ages. Susan also supports the approach by explaining a specific program for those who have been with the organization for twenty years. “I am not fifty but have been here for twenty years. I have the same opportunity to work 20 hours per week and maintain full health benefits. As David said earlier, it is for all employees.”

#### *Theme # 4: Importance of Supportive Culture*

The role of culture is important and a great deal of research has tried to shed light on how culture continues to be one of the most important ingredients to the success of the organization. Understanding the theory of culture and the difficulty encountered when trying to change the culture of an organization has been the topic of research, books, and discussion. The description of the culture within these organizations is fairly straightforward, although there is much more to it than what is suggested during the interviews. However, these three organizations understand the importance of culture and are able to describe how it has had impact on the attitudes towards employees.

*Organization A*

“We are an organization with a heart and at the same time, we make good business decisions.” This is a statement from John after an interview question concerning hiring the best person for the job. He is well aware that the culture of an organization lays the foundation for the decisions made and that what is important is to help, serve and educate. At the core of this organization’s mission is the provision of work to people who are blind or visually impaired. The culture of this organization is supportive of the mission and the people who work for the organization. John shares his view on the importance of culture.

“We need the individuals as well as the group. The combination of everyone’s thoughts and ideas make the organization better as a whole. That’s what culture is really about. We take advice and put it together to come out with the best product or decision as a whole. It is not just the person at the top; we truly have an inclusive process. Because of that, we have an exponential growth. We respect the individual as well as the group. Culture is about a participative and inclusive process and communication is the key to make it work. At the end of the day it is not his way, her way, or my way; it is our way.”

One of the most telling statements about this organization is towards the end of the interview where John sums it up by saying, “We are more like a family. Like a family everyone may not be satisfied all the time but we are able to talk. It is a participative process and we don’t hold grudges.”

*Organization B*

One of Marla's first statements deals with the culture of the organization.

“Inclusiveness is one of the things we live by. I would say that it is what I consider one of our foundational characteristics as an organization. We create an atmosphere and environment where everyone is at the table and everyone is included.” She notes that the organization feels it is important that employees know they are appreciated and respected for all they have given to the organization. A main reason to apply for the AARP award was due to feedback from the employees. An AARP member brought the award to our attention and it seemed to be a good idea. The award was not only for the organization but also for the employees.

The AARP award is one of many that are displayed: 100 Best Companies for Working mothers; Top 50 Companies for Diversity; Top 50 Companies for Executive Women; and recognition for community involvement. When asked about these awards Marla replied:

“We are very proud of the recognition we have received. There is a lot of effort around applying for awards and pulling the information together. It's a group effort across the organization and across many divisions and departments. Many people are involved who are invested in making sure we represent ourselves in a way we'll all be proud of. It is a group effort to make sure we are recognized.”

*Organization C*

Before moving into the questions for the interview, David explains,

“The core value at the heart of who we are is our diversity, inclusion and respect around certain values. This drives the organization including various programs and how we treat all of our employees. It also drives our overall work cultures in terms of the initiatives we put in place.”

Realizing the importance of the culture of the organization, David says, “We’ve been on a journey to improve our culture for some time.” Each year, there is an annual work culture survey conducted by an outside vendor that has national norms and significant healthcare norm. “We tend to get our normative data from a work culture standpoint from a national employee survey company.” Results suggest that culture is improving resulting in better recruitment and retention. Another benefit is greater internal performance from employees.

As mentioned earlier, the interviews provide the main source of data for the study. Each participant substantiates in his/her own unique manner the attitudes reflected towards older workers as reflected by the themes that emerged from the interviews. Table 2 represents a generalized synopsis of participants’ response and highlights how organizations respond to the themes that emerged.

Table 2: *Overview of Response by Theme*

| <b>Themes</b>                                  | <b>Organization A</b>                      | <b>Organization B</b>   | <b>Organization C</b>   |
|--|--|---|---|
| Positive business benefits from AARP award     | Visibility – community and nationwide      | Good Will – internal and external                             | Benchmark   |
| Good business to hire and retain older workers | Maturity, dedication, communication skills | Knowledge/Skills and understanding of history of organization | Need to retain experienced employees                                |
| Age neutral practices                          | Best person for the job                    | Best person for the job                                       | Best person, equal opportunity regardless of age, race or gender    |
| Importance of supportive culture               | Family, inclusion, participation by all    | Family, inclusion, input from all to improve organization     | Build culture to reflect values of diversity, inclusion and respect |

The primary source of data is from the interviews; however it is important to use multiple sources of data to develop a holistic and plausible explanation of the data (Richards & Morse, 2007). For this study, the researcher incorporates observations and documents to support data from the interviews. This triangulation serves to clarify meaning by identifying different ways the phenomenon is being seen (Stake, 1994).

#### Observations

The researcher's observations of the workplace were limited due to time constraints on the researcher's part. Observations included the reaction of the participants during the interview and the worksite as the researcher parked, walked into the building, and walked into the interview room. All participants were welcoming to the researcher. When initially contacted to participate in the interview, each one expressed a willingness to discuss his/her organization as part of the study. At no time during the interviews did the researcher feel that the participants were less than forthcoming and engaged in response to the questions. Also, the interviewees took the time and initiative to gather documents that would be helpful.

Also of interest are the actual surroundings that house the organization. The researcher arrived at the site early to be able to observe what the organization may view as important and to display to the public. The participants mentioned during the interviews that their organization received a number of awards, not just the AARP award. The public area for the organizations contained framed letters, photographs, plaques, newspaper articles, etc. all testaments to the value of the organization both locally and nationally.

A statue at the entrance of Organization A was of particular interest. It presented a man who worked for 42 years without ever taking a sick day. He could not see, hear or speak. It is the last story that John shared during his interview.

“The story I told you earlier about the Commodore truly represent what we can accomplish with dedicated people. He could not speak, see, or hear and yet did not miss a day of work for 42 years. He represents the past, present, and future. His statue is at the entrance and his ideals are the foundation for this organization.”

#### Documents

Each participant provided documents or suggested that the researcher go to the Web site for further information about benefits and policies. The documents and Web-site both supported that the organizations had policies and procedures in place supportive of all employees. Each Web site offered a newsletter or recent articles that had been published about the organization. All awards, especially employees who had been selected to receive recognition were the focus of many of the articles.

#### Summary of Findings

As illustrated by the interviews, the attitudes displayed by the three interview participants were positive in regards to older workers. Observation and document review confirmed that the organizations, likewise, had positive attitudes and behaviors towards older workers.

The PIES model can help us understand more about the connection between the positive attitudes of the employers (proxy: interviewee), and the award winning behaviors of the organizations. Table 3 lists some of the words and phrases that were used during the

interviews to describe attitudes about older workers and how they are valued. Using the subsets of the PIES Model, organizations do express positive attitudes and appreciate the contributory value of the older worker.

Table 3: *Subsets of Human Capital “PIES”*

| <b>Organization</b> | <b>Psychological Capital</b>   | <b>Intellectual Capital</b>   | <b>Emotional Capital</b>                                   | <b>Social Capital</b>   |
|---------------------|--|---|--|---|
| Organization A      | -Not big whiners<br>-Rise above a huge disability<br>-Resilient<br>-Work ethic | -Experience<br>-Holistic approach<br>-Communication skills  | -“get it done” attitude<br>-Maturity<br>-Desire to succeed | -Dedicated<br>-Supportive of organization<br>-Loyalty                                     |
| Organization B      | -Optimistic<br>-Good will  | -Knowledge and skills they bring to the table<br>-Knowledge of the organization<br>-Flexible/Creative | -Maturity<br>-Dedicated<br>-Dependable                     | “this is like my family<br>“we are a community and we work together”<br>Proud of employer |
| Organization C      | -Confidence in abilities   | -Experienced<br>-Knowledgeable<br>-Able to meet demanding position<br>-Capable<br>-Judgment skills    | -Maturity<br>-Desire to succeed                            | -Proud to be an employee<br>-Work has meaning<br>-Greater internal performance            |

Data from the interviews support the PIES Model as well as Duncan’s positive rational for hiring older workers.

## CHAPTER FIVE: DISCUSSION

This study sought to gain a better understanding of the links between behaviors and practices supportive of older workers and general attitudes expressed about their positive or negative benefits to the organization. Specifically, the findings of the study should support the research questions suggesting that the attitudes of employers who have been selected by AARP as best employers for workers over 50 will be positive. Attitudes expressed by the employers towards employees in general as well as towards older workers can dramatically influence business, culture and how the organization is viewed both internally and externally

The basic approach to the study is based on Peterson and Spiker's (2005) PIES Model focusing on the contributory value of older workers and supporting that all they have done, all their contacts and relationships, and the intelligence they bring to future work give them a value to the marketplace. This PIES model draws from positive psychology suggesting that the result of looking at contributory value will lead in positive outcomes for the organization and for employees, including creation and retention of institutional memory, increased productivity, decreased turnover and increased loyalty (Peterson & Spiker, 2005).

As often happens in research, the findings yielded some surprises. While the researcher expected a focus on attitudes about older workers and what these employees brought to the organization, the participants took another direction. The following discussion section, based on synthesizing results across all data sources is organized into three areas. First, the positive business benefits of the AARP award. Second, is the importance of an age neutral approach to hiring and retention decisions. Finally, the importance the organization places on culture in developing and sustaining positive attitudes.

### Business Benefits

Participants stressed the business benefits realized from the AARP award. The researcher had anticipated moving to a discussion of the positive business benefits resulting from older workers within the organization, *Figure 4, Positive Contributory Value* but all three organizations focused on the award itself and benefits of the actual award. *Table 2* provides a synopsis of the participant responses. John, Organization A, noted the visibility that the award had brought to the organization, both within the community and nationwide. This is important since the workforce is made up of those who are blind or visually impaired. The award provided the opportunity to connect with this group. Organization B responded that the award brought both internal and external good will. Finally, the health care facility, Organization C, used the award as a benchmark measure to be able to compare the organizational nationally to other similar facilities. It helped to validate the work culture survey conducted yearly. Over the past ten years, this organization has conducted these surveys in order to improve the culture within the organization. This is important to attract and retain experienced personnel.

### Age Neutral Approach

AARP recognizes that the recruiting efforts, management styles, training policies, work arrangements, benefits, and other company policies do not focus only on older workers but keeping valuable employees of all ages. The bottom line is that these companies are aware that one way to stay competitive is to make their jobs more attractive to qualified and skilled workers, regardless of age.

The participants confirm that decisions about hiring, training, etc. are age, gender and race neutral. When asked specifically if it is good business to hire and retain older workers, responses did reflect the contributory values such as maturity, dedication, communication skills, knowledge/skills and experience. All responded that the emphasis is on selecting the best person for the job.

### Culture

All participants recognized the importance of organizational culture. Defining culture and the impact it has on attitudes and behaviors is a complex issue; however, these organizations seem to realize the connection and described the importance of the supportive culture provided by their organizations. Diversity, inclusion, respect and participation were foundations for developing a culture that would attract and retain the best employees. Organization A is described as an organization with a heart with the ability to make good business decisions. Both Organizations A and B say that they are more like a family and encourage communication and a participative process. A final statement by John reflects his thoughts on culture, “The combination of everyone’s thoughts and ideals make the organization better as a whole. That’s what culture is really about, inclusiveness, participation, and respect for the individual.

### Strengths and Limitations

#### *Strengths*

All three organizations have made successful business decisions that have allowed them to thrive during diverse economic times. One organization began in 1936 and another has 77 years of experience. The third has spent the past ten years on a focused effort to

develop a positive and inclusive organizational culture that will attract employees. Along with good business decisions these organizations, as validated by the AAPR award, have practices and policies that benefit all employees including older workers. This adds to the validity and reliability of this study, as well as the depth in which data was provided.

Each participant was sincere and positive in taking part of the study. The interviewees expressed their interest in the study as well and taking this as an opportunity to explain to another audience the positive policies, practices, benefits and overall culture that made this a good place to work.

The PIES Model also helped to provide a framework to explore the similarities as well as differences among the organizations. As a tool, it helped to clarify any contradiction in expressed attitudes and actual policies and practices. It helped to capture the complexity of the link between attitudes and behaviors.

#### *Limitations*

An obvious limitation is having only three participants for the case study. The researcher limited the studies to organizations within North Carolina. Although each case study represented a different business area, all were located in a similar demographic area. The addition of a more diverse group of participants would perhaps add to the depth of the data and findings.

The model used to try to further understand the attitudes about older workers and how positive attitudes impact organizational decisions, is the PIES Model (Peterson and Spiker, 2005). The model seems to be limited in its use by other researchers and has not often been

used to help understand business decisions and organizational culture. Also, other research on this topic is limited.

The amount of time allotted for the interviews was often insufficient. The researcher was not able to pursue topics of interest that might have lead to a more in-dept understanding of attitudes, beliefs, and actual practices. All questions (Appendix C), were covered during the interviews.

#### Additional Study

The study seems to indicate that behaviors of these organizations are linked to positive attitudes. However, these attitudes are not linked solely to older workers but to all employees and to a culture that is supported of all employees within the organization. While providing insight, there are more complex issues that cannot be addressed in this study and numerous questions that arise.

There are many areas for further research that would help to better explain the interaction of business decisions, culture, how attitudes develop and how behaviors may impact attitudes and if positive psychology does make a difference. The following topics may be for future interest.

- Why organizations are motivated to develop policies and practices that are of direct benefit to the employee but may be costly
- What are the economic implications and can an organization justify or quantify financial benefits (ROI) of implementing specific programs and policies
- The role economic conditions on business decisions that may or may not benefit employees, especially older workers

- The challenge of organizational change to move towards a culture supportive of inclusiveness, diversity, participation and respect
- How the culture of the organization helps to gain positive organizational behavior (POB) from employees
- A focus on the employees rather than the employers using the PIES Model

### Conclusion

There can be little doubt that there is a link between behaviors and attitudes and that behaviors reflect attitudes and attitudes reflect behaviors. This study sought to investigate the relationship of employer attitudes and behaviors towards older workers expressed by three organizations recognized as being best employers for workers over 50. The PIES model (Peterson & Spiker, 2005), helped to show the relationship of an appreciation for older workers and positive outcomes for these organizations and for the employees. There are also implications that a positive perspective may also play a role in helping organizations realize financial and competitive benefits. As expressed by all three participants, recognition by AARP resulted in positive business benefits for the organizations. Building on a positive approach, participants also expressed how their organizations' supportive culture is an important ingredient for success. As stated by John in Organization A, "We are an organization with a heart and at the same time, we make good business decisions."

In order to understand larger more complex issues such as organizational change, the role of organizational culture, and how business decisions are made, it is important to first recognize and accept this link between attitudes and behaviors. This line of research may help

to uncover answers for how to successfully understand and interpret the importance of behaviors and attitudes as well as provide practical solutions that offer a range of approaches that can be incorporated into the business of the organization.

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**APPENDICES**

## APPENDIX A

Revised 04/2009

**North Carolina State University**  
**INFORMED CONSENT FORM for RESEARCH**

Title of Study: Accentuate the Positive: Using the Approach of Positive Psychology to Appreciate the Contributory Value of Older Workers

Principal Investigator      Inez vanArsdall  
 Storberg-Walker

Faculty Sponsor (if applicable)      Julia

**What are some general things you should know about research studies?**

You are being asked to take part in a research study. Your participation in this study is voluntary. You have the right to be a part of this study, to choose not to participate or to stop participating at any time without penalty. The purpose of research studies is to gain a better understanding of a certain topic or issue. You are not guaranteed any personal benefits from being in a study. Research studies also may pose risks to those that participate. In this consent form you will find specific details about the research in which you are being asked to participate. If you do not understand something in this form it is your right to ask the researcher for clarification or more information. A copy of this consent form will be provided to you. If at any time you have questions about your participation, do not hesitate to contact the researcher(s) named above.

**What is the purpose of this study?**

This study seeks to investigate the attitudes towards older workers expressed by those employers who exhibit practices and behaviors and implement policies to recruit and retain older individuals. The purpose of the study is to gain a better understanding of how a shift from negative to positive employer attitudes concerning older workers could result in behaviors and practices supportive of older workers. Few studies focus directly on the issue of employer perceptions of older workers and the outcome of employer behavior and practices. This study seeks to examine the connection between attitudes and employer practices affecting older workers. Data for this study will be gathered through interviews of a member of the organization who has an understanding of the human resource policies and practices within the organization.

**What will happen if you take part in the study?**

If you agree to participate in this study, you will be asked to participate in one in-depth interview. The duration of the interview will be between 1-1.5 hours. After each interview is transcribed, you will be given the opportunity to review your transcript for accuracy, make clarifications and point out any parts of the interview you wish not to make public. Also, the researcher may contact you for clarification of any responses you made during the interview. Besides the interview, any documents, materials, and/or written human resource policies/practices will be useful to help gain insight to the organization's attitudes concerning older workers.

The participant will be contacted by phone to set up a time for the interview to be conducted. The interview will take place at the participant's place of work. At the beginning of the interview, the researcher will explain the nature of the study. The participant will be provided with a list of the interview questions prior to the actual interview.

**Risks**

The main risk to you from participation stems from breaches of confidentiality. In order to protect confidentiality, all data and any other information or documents provided will be maintained in a confidential

manner, using a code number that is linked to your identity and that of the organization you represent. The 'master' list that links your code number to your identity will be stored separately from the interview transcriptions. No one will read your interview responses besides the researcher and yourself. Any reports of the research results will not include any names. **Your company name may be used in reports about this research. Due to this and the small number of participants, we cannot guarantee full confidentiality. Some people may be able to identify you from the research reports.**

### **Benefits**

Those interested in this research include the general public, policy makers, groups interested in the aging population and employment issues, and employers who are interested in developing policies and practices to attract and retain older employees within the organization. The relationship between employers' attitudes about older workers and their practices has not been studied in great detail. This study will contribute to the literature on attitudes and practices of employers towards hiring older workers and will help gain a better understanding of how a shift from negative to positive attitudes about the value of older workers could result in a change in these attitudes and behaviors.

### **Confidentiality**

The information in the study records will be kept confidential. A tape recorder will be used to tape the interviews that will be kept in a secure place at all times. In order to protect confidentiality, all data, including e-mails or other documents, will be maintained in a confidential manner, using a code number that is linked to the subjects'/organizations' identities. The 'master list' that links code number to identities will be stored separately from the transcriptions. No one will read interview responses besides the researcher and the subject. Any reports of the research will not include subject or organizational names. Any audiotape files will be stored in a locked area and identifiable information will be kept separate from the tapes. Audiotapes will be destroyed at the end of the study. No reference will be made in oral or written reports which could link you to the study.

### **Compensation**

You will not receive anything for participating.

### **What if you have questions about this study?**

If you have questions at any time about the study or the procedures, you may contact the researcher, Inez vanArsdall at 213 Wild Turkey Trail, Chapel Hill, NC 27516 or 919-967-1013 or inezvana@mindspring.com.

### **What if you have questions about your rights as a research participant?**

If you feel you have not been treated according to the descriptions in this form, or your rights as a participant in research have been violated during the course of this project, you may contact Deb Paxton, Regulatory Compliance Administrator, Box 7514, NCSU Campus (919/515-4514).

### **Consent To Participate**

Your participation in this study is voluntary; you may decline to participate without penalty. If you withdraw from the study before data collection is complete, your data will be returned to you or destroyed at your request.

"I have read and understand the above information. I have received a copy of this form. I agree to participate in this study with the understanding that I may choose not to participate or to stop participating at any time without penalty or loss of benefits to which I am otherwise entitled."

**Subject's signature** \_\_\_\_\_ **Date** \_\_\_\_\_  
**Investigator's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

## IRB APPROVAL

From: Debra A. Paxton, Regulatory Compliance Administrator  
North Carolina State University  
Institutional Review Board

Date: October 19, 2009

Project Title: Accentuate the Positive: Using the Approach of Positive Psychology to  
Appreciate the Contributory Value of Older Workers

IRB#: 1148-09-10

Dear Dr. Stroberg-Walker and Dr. vanArsdall:

The research proposal named above has received administrative review and has been approved as exempt from the policy as outlined in the Code of Federal Regulations (Exemption: 46.101.b.2). Provided that the only participation of the subjects is as described in the proposal narrative, this project is exempt from further review.

## NOTE:

1. This committee complies with requirements found in Title 45 part 46 of The Code of Federal Regulations. For NCSU projects, the Assurance Number is: FWA00003429.
2. Any changes to the research must be submitted and approved by the IRB prior to implementation
3. If any unanticipated problems occur, they must be reported to the IRB office within 5 business days.

Thanks you.

Sincerely,

Debra A. Paxton  
NCSU IRB

## APPENDIX B

*Script of Phone Introduction to Participants*

Hello, my name is Inez vanArsdall and I am a graduate student at North Carolina State University working on my Masters in adult education/human resource development. My thesis topic concerns attitudes of employers towards older workers. Specifically, I seek to investigate why some organizations seem to value the contributions of older workers more than other organizations.

Your organization (*name of organization*) has been recognized by AARP as a best employer for workers over 50 for over four years. This program awards companies that exhibit forward-thinking approaches to recruiting and supporting valuable employees of all ages especially older workers.

Your name was provided to me by (*name of person*) at AARP as someone who is knowledgeable about the recognition program and involved in the process to apply. I am asking for an hour to an hour and a half of your time to interview you concerning the decision to apply for this recognition, the impact of this award on the organization, and characteristics or your organization's culture and policies that demonstrate valuing older workers.

If you agree to participate, you will receive a consent form outlining what will be involved in the interview. Also, you will be provided with the list of questions. You are a valuable source of information in helping to understand organizations that address the issues of an aging workforce and serve as roadmaps for the workplace of tomorrow.

Thank you for your time.

## APPENDIX C

### **Participant Interview Questions**

1. Please talk about the history of the decision to apply to AARP's recognition program for best employers for workers over 50.
2. Why do you think the organization decided to apply for this recognition?
3. How would you describe the impact on the organization as a result of being recognized by AARP?
4. My study is seeking to understand why some organizations seem to value the contributions of older workers more than other organizations. Your organization has been recognized for valuing this important segment of the workforce. Can you describe characteristics or aspects of your organization's culture and policies that demonstrate valuing the older worker?

## APPENDIX D

### **AARP Best Employers for Workers Over 50**

#### **About the Program**

by: AARP.org | from: [AARP](#) | September 2009

The aging of the workforce in today's economy has presented new opportunities and advantages for employers to innovate and adapt to stay competitive. **The AARP Best Employers for Workers Over 50** program awards businesses and organizations that have implemented new and innovative policies and best practices to meet their talent management needs in the current economic environment. These organizations are creating roadmaps for others on how to attract and retain top talent in the today's multigenerational workforce.

Now celebrating its 10th anniversary, the program encourages applications from a variety of employers in the non-profit and for-profit sectors. In order to recognize the important role that government employers play in the U.S. workforce, AARP also opened the program to public employers at the local, state, and federal levels.

In addition, last year AARP Best Employers for Workers Over 50 acknowledged employers in the medical and health-care industry in a separate recognition category because of outstanding accomplishments in talent management in the multigenerational workforce within the industry.

With this year's application AARP will transition "Best Employers" to a biennial awards competition.

AARP recognizes that a growing number of U.S. employers are developing progressive policies and practices that are meeting the needs of the country's aging workforce. AARP seeks to share employers' best practices with the business community at large and to promote employment opportunities for older workers.

#### **Why Did AARP Launch the Program?**

By 2016, one-third of the total U.S. workforce will be age 50 or older, up from 28 percent in 2007. As the percentage of younger workers continues to decline, attracting and retaining mature, experienced employees is becoming increasingly important for employers who seek to retain their competitive edge in today's marketplace.

## **Benefits of Applying to the AARP Best Employers for Workers Over 50 Program**

All employers who apply to the AARP Best Employers for Workers Over 50 program, including those who do not receive an award, get valuable workforce-management information and feedback about their applications. Employers who are selected to be AARP Best Employers receive other benefits, including national and local media recognition. Honorees also have opportunities to publicly showcase their innovative employment practices and are allowed to use the AARP “Best Employers” logo in recruiting efforts.

### **Benefits for All Applicants**

Everyone who applies for this program receives the following:

- **Feedback Comparing Your Organization to Other Applicants:** Even if your company or organization is not selected as one of the AARP Best Employers for Workers Over 50, you will receive feedback that can help address the needs of mature workers. You will learn how your organization's scores compare to the scores of all applicants in your industry.
- **Relevant Research and Management Tools:** AARP will send you research and management tools to help you build and retain a competitive edge in today's labor market.

### **Benefits for Honorees**

In addition to the feedback report and management tools that all applicants receive, being named an AARP "Best Employer for Workers Over 50" is a great honor and gives your company or organization the following benefits:

- **National Recognition in the Marketplace:** You will be recognized by AARP in the nation's leading media outlets. In the past, the list of outlets has included key business publications, such as "*The Wall Street Journal*," "*Business Week*," "*Fortune*," and "*HR Magazine*."
- **Local Recognition in Your Community:** You can tout your accomplishments on local media. The local AARP office in your state will work with you to announce your designation to our members and to other audiences.
- **Access to over 40 Million AARP Members:** You will be featured in AARP The Magazine, AARP's premier publication. It reaches more than 35 million members and is the largest circulation magazine in the world. AARP members will also read about your story and accomplishments in other AARP publications and venues, such as AARP Bulletin, VIVA (AARP's bilingual Spanish-English magazine), and online at [AARP.org](http://AARP.org)

- **Use of the AARP 'Best Employer' Logo in Your Recruitment Efforts:** Employers with good policies and practices for older workers will undoubtedly benefit all workers in the organization regardless of age. Honorees can use the AARP Best Employers for Workers Over 50 logo in their recruitment efforts to demonstrate their commitment to valuing an age diverse workforce. The AARP “Best Employers” logo can only be used in personnel efforts, however; it cannot be used to help promote the winning company’s products or services.

### **Who Is Eligible to Apply?**

Any U.S.-based employer with at least 50 employees is eligible to apply to the AARP "Best Employers for Workers Over 50" program. This includes for-profit companies, not-for-profit organizations and government employers.

### **When Will We Have Another Opportunity to Apply?**

The application period is now closed. Please come back in the Fall for a complete list of the 2011 AARP Best Employer Award winners. We will begin taking applications for the 2012 AARP Best Employer Awards in September 2011.

AARP Best Employers for Workers Over 50

### **The Selection Process**

by: AARP.org | from: [AARP](#) | September 2009

Employers interested in applying for the AARP Best Employers for Workers Over 50 award must submit a comprehensive application that includes questions about their human resources practices and policies. Because policies that are good for mature workers are often beneficial for all, employers are not required to have programs dedicated exclusively to older employees. However, employers who can demonstrate that their programs are particularly valued by mature workers may receive additional credit during the evaluation process.

Areas of consideration include:

- Recruiting practices
- Opportunities for training, education, and career development
- Workplace accommodations
- Alternative work options, such as flexible scheduling, job-sharing, and phased retirement
- Employee health and pension benefits
- Benefits for retirees

Applications submitted by the deadline are evaluated by an independent survey firm using evaluation guidelines developed by AARP's workforce experts and research staff in consultation with external labor experts.

After the survey firm's review, the applications and initial ratings are sent to AARP and to an independent panel of judges.

The panel of judges, comprised of private-sector, non-profit, and government labor experts, reviews the applications. The opinions of the judges, together with the initial rating, form each applicant's final rating.

After the evaluation is complete, finalists are vetted to ensure that any organization recognized as one of the AARP Best Employers for Workers Over 50 has practices that are generally consistent with AARP's public policies and values.

All applicants, including those who are honored and those who are not, are notified of the outcome and receive feedback comparing their scores to those of other applicants.

The application period is now closed. Please come back in the Fall for a complete list of the 2011 AARP Best Employer Award winners. We will begin taking applications for the 2012 AARP Best Employer Awards in September 2011.