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ABSTRACT

A study examined the extent to which organizations in three New England states valued newly hired older workers. Telephone interviews were conducted with 105 directors of human resources (DHRs) and with 113 director supervisors from a broad range of organizations. Major dependent variables were general employer motivations and expectations related to hiring older workers and specific reactions to supervising older workers on a daily basis. Regarding DHR motivations to hire, flexibility in tasks performed and willingness to adapt to new technologies were identified as the two most important attributes. A factor analysis of employee characteristics considered by DHRs at time of hiring revealed four factors: extrinsic--full-time, extrinsic--part-time, intrinsic--personal characteristics, and intrinsic--fit. Overall, DHRs were motivated to hire older workers for many reasons suggested in employment literature--their reliability, rich experience, work ethic, and general excellence as employees. Supervisors, who also reported strongly positive feelings toward newly hired older workers, appeared to make clearer distinctions between younger and older workers than DHRs did. They saw older workers as being more attentive to detail, having fewer absences, and displaying greater enthusiasm toward work. Supervisors paid especially high regard to the youngest workers in the sample (aged 50-54), workers with college degrees, and workers with excellent or good health. (Appendixes include 40 references, additional DHR and supervisor data, employer contact protocols, and survey instruments.) (YLB)

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Human Services Development Institute

EMPLOYERS' VIEWS ON THE VALUE OF OLDER WORKERS  
FINAL REPORT

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# Human Services Development Institute

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HSDI has a successful fifteen-year history of developing collaborative research and development programs which are responsive to the needs of decisionmakers. Since its founding in 1972, the Institute has sought to marshall the knowledge and expertise of the University to assist government and private agencies to identify and solve policy and management problems related to the organization, financing, and delivery of health care and human services. The Institute has extensive experience in the fields of health care, child welfare, social services, aging, substance abuse, mental health, and developmental disabilities.

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**EMPLOYERS' VIEWS ON THE VALUE OF OLDER WORKERS**

**FINAL REPORT**

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## EXECUTIVE SUMMARY

This study examined the extent to which organizations in three New England states valued newly hired older workers. One hundred and five (105) Directors of Human Resources (DHRs) and 113 direct supervisors within organizations in Connecticut, Maine, and New Hampshire, which had hired at least one worker over the age of 50 since January, 1988, were interviewed by telephone. Major dependent variables were (1) general employer motivations and expectations related to hiring older workers and (2) specific reactions to supervising older workers on a daily basis.

Fifty-nine percent (59%) of the DHRs and 52.2% of the direct supervisors were women. Of the individual older workers who served as specific reference points during the supervisor interviews, 57% were women. The median age of DHRs in the sample was 42, supervisors 45, and older workers 60. The average older worker in this sample worked 30 hours per week and earned \$8.43 per hour.

The organizations sampled were distributed across a wide range of businesses, including health/social service (23.8%), retail/wholesale/service (19.1%), business/financial (18.1%), and manufacturing (17.1%). Moderately large organizations (100-499 employees), represented 34.9% of the organizations sampled; the remainder of the sample was evenly distributed among small (less than 25 employees), moderately small (25-99), and large (over 500 employees) organizations.

In general, senior officers who were charged with setting employee policy and who often directly hired new personnel had strongly positive views of older workers. They are motivated to hire older workers for their reliability, wealth of experience, superior work ethic, and general excellence as employees. Also, when asked to rank 13 older worker qualities, DHRs reported that specific "intrinsic" worker attributes such as being flexible in tasks performed, learning new things, adapting to new technologies, making independent decisions, and creative problem solving were more important motivations-to-hire than various "extrinsic" qualities.

DHRs sought different worker qualities depending upon type and size of the organization. Manufacturing businesses sought older workers who showed an aggressive or competitive spirit, who were looking for permanent placements, and who were willing to work flexible hours. Education and health/social service organizations wanted people who were willing to be flexible in the tasks they performed. Small companies sought workers who could make independent decisions, work flexible hours, and solve problems on the job (perhaps suggesting the need for employee adaptability); DHRs in larger organizations hired people who were willing to learn new technologies.

Supervisors also reported strongly positive feelings toward newly hired older workers. They gave superlative ratings on various qualities such as older workers' loyalty to the organization, ability to get along with co-workers, general attitude toward work, and other crucial job characteristics. Supervisors appeared to make clearer distinctions about observable differences between older and younger workers than DHRs did. They saw older workers being more attentive to detail, having fewer absences, and displaying greater enthusiasm toward work than younger employees.

Differences occurred in supervisors' ratings by selected worker characteristics. For example, supervisors paid especially high regard to the youngest workers in the sample (age 50 - 54), workers with college degrees, those who generally had excellent or good health, and workers who had no specific health limitations. The amount of time spent supervising older workers was also important. Employees who were supervised less frequently were viewed by their supervisors in a more positive light.

Selected job characteristics affected supervisor evaluation. Workers in permanent, as compared with temporary or seasonal jobs, were perceived as possessing more desirable worker qualities and having superior job performance. Also, jobs in which older workers were free to make decisions about how the work was going to get done related to favorable supervisor ratings.

One major recommendation from this study is for employers, job service counselors, job-bank personnel, and others engaged in employment services to realize the high value placed on older workers by businesses and other organizations. While differences among individual workers exist, it is important to recognize that most older workers can and do make excellent employees.

Secondly, because many people do not work exclusively for money and other material (extrinsic) rewards, intrinsic work values, such as one's willingness to learn new ideas or technologies, the ability to make independent decisions, overall flexibility, and one's ability to exercise independence and control over one's work ought not to be overlooked when attempting to place or directly hire older workers. This study points to the fact that employers seek individuals who have strong intrinsic work values, that is, who seek "psychic" as well as financial income from their jobs.

A third recommendation from this study is to include the input of direct supervisors in the development of recruitment and hiring policies and when making specific hiring decisions within organizations. Because DHRs and supervisors often see things from different vantage points, allowing supervisors to influence the development of employment policies and the actual hiring of new personnel would add significant value to these difficult and crucial processes. Supervisors are often directly affected by the caliber of the individuals hired and their resultant job performance. They are often in a good position to make important contributions for ensuring a good "fit" between potential employee, job requirements, and work culture.

## ABSTRACT

This study examined the extent to which organizations in three New England states values newly hired older workers. One hundred and five (105) Directors of Human Resources (DHRs) and 113 direct supervisors representing a broad range of organizations were interviewed by telephone. Major dependent variables were (1) general employer motivations and expectations related to hiring older workers and (2) specific reactions to supervising older workers on a daily basis.

Fifty-nine percent (59 %) of the DHRs and 52.2 % of the direct supervisors were women. Of the individual older workers who served as specific reference points during the supervisor interviews, 57 % were women. The median age of DHRs in the sample was 42, supervisors 45, and older workers 60. The average older worker in this sample worked 30 hours per week and earned \$8.43 per hour.

Regarding DHR motivations-to-hire, "flexibility in tasks performed" and "willing to learn new things" were the two most important worker attributes followed by "willingness to adapt to new technologies" and "ability to make independent decisions on the job." A factor analysis of employee characteristics considered by DHRs at the time of hiring revealed four factors: "Extrinsic: Full-Time," "Extrinsic: Part-Time," "Intrinsic: Personal Characteristic," and "Intrinsic Fit."

Analysis of variance revealed that Retail/Wholesale/Service organizations were more interested in "Extrinsic: Part-Time" characteristics than other types of organizations ( $p = .008$ ). Education and Health/Social Service agencies were more interested in "Intrinsic: Personal Characteristics" than other organizations ( $p = .045$ ).

Overall, DHRs were motivated to hire older workers for many of the reasons suggested in much of the employment literature to date, i.e., their reliability, rich experience, work ethic, and general excellence as employees. The positive aspects of hiring older workers appeared to outweigh the negative ones. This research proved to be confirmatory of much of the other research published on older workers.

Supervisors, who also reported strongly positive feelings toward newly hired older workers, appeared to make clearer distinctions about observable differences between younger and older workers than DHRs did. Specifically, they saw older workers being more attentive to detail, having fewer absences, and displaying greater enthusiasm toward work than younger employees.

Differences occurred in supervisors' ratings by selected worker characteristics. For example, supervisors paid especially high regard to the youngest workers in the sample (age 50 - 54), workers with college degrees, and those who generally had excellent or good

health. Supervisors strongly favored older workers who did not have a health limitation. Chi square analysis revealed differences in supervisor ratings between workers with and without health limitations on numerous variables, including "ability to learn new procedures and technologies" (p. - .001), "worker commitment to the job" (p. - .004), "willingness to perform additional tasks" (p. - .001), and "ability to count on older worker in a crisis" (p. - .006).

One major recommendation from this study is for direct supervisors to have input in the hiring decisions within organizations. Supervisors, who often have daily contact with workers, viewed matters from a different perspective than DHRs and have valuable insights about individual worker qualities and job performance.

Secondly, it is important for organizations to realize that many older workers do not work exclusively for money and other material rewards. Earlier research has shown that older workers highly value the meaning of the work itself and the sense of accomplishment it provides them. This study pointed to the fact that employers are also motivated to seek individuals who have positive intrinsic work values, that is, who seek psychic as well as financial income from their jobs.

Finally, it is important that older workers themselves realize their value as employees. Too often older persons who are between jobs, beginning paid work after a career in the home, or otherwise seeking employment in later life doubt their worth in the workplace. This study revealed that older workers are excellent human resources and are highly valued by the organizations who hire them.

# EMPLOYERS' VIEWS ON THE VALUE OF OLDER WORKERS

## I. INTRODUCTION AND BACKGROUND

### A. Project Objectives

In an earlier AARP Andrus Foundation funded study, Brady and Fortinsky (1989) examined newly hired older workers' views of successful employment. However, that study did not explore how newly hired older workers were viewed by the businesses and other organizations who hired them. This research investigated the motivations of hiring employers, differences in those motivations by type of industry and other organizational characteristics, as well as how well direct supervisors were satisfied with their newly hired older employees.

Specifically, this research attempted to answer four major research questions:

Research Question #1: What motivates employers to recruit and hire older workers?

Research Question #2: Do employers have different motivations depending upon the specific characteristics of the company or business?

Research Question #3: How satisfied are supervisors with recently hired older workers in their companies?

Question #4: How do supervisors' experiences with older workers vary depending upon (1) characteristics of the older employee (2) characteristics of the supervisor (3) characteristics of the job (4) characteristics of the company or business?

### B. Review of the Literature

#### Labor Market Participation of Older Americans

"Older workers are important to the success of American industry, not only as a resource for production, but also for the maturity and experience they bring to the workplace..." This is a sentiment expressed early and often in the report of the U.S. Secretary of Labor entitled Older Worker Task Force: Key Policy Issues for the Future (McGlaughlin, 1989b, p. 3). The fact is, however, that few social trends in the twentieth century have been as distinct, consistent, and significant as the decline in labor force participation among older male Americans. At the turn of the century, men reaching the age of 65 could expect to work well beyond the age presently accepted as appropriate for retiring. In fact, more than two-thirds of all men 65 and older held jobs. By 1950, that

figure had dropped to less than one-half (Dennis, 1988); McLaughlin, 1989b). By 1967, labor force participation among older men was down to 27%; by 1987, only 16% of men 65 and over were at work. Out of a population of 11.6 million older men in 1987, 1.9 million had jobs or were seeking them (Berry, 1989).

The decline in participation in the workforce has been the sharpest for the 65 and older segment of male workers. In 1950, 86.9% of men in this age group were either working or looking for work; by 1990, their participation had dropped to 67.7%. The working life of other age groups has also shortened. Even men who might be considered middle aged older workers are less attached to the labor force: the participation rate of male workers aged 45 to 54 has fallen from 95.8% in 1950 to 90.7% in 1990 (AARP, 1991).

Men may be spending proportionately fewer years of their lives at work, but women are spending more. Although only about 8% of older females remain in the labor force past age 65, the participation of younger women has been growing since 1955. Analysts expect this "feminization of the workforce" to continue into the next century. Women now account for over 40% of the middle-aged and older labor force, up from between 20 to 30% in 1950 (AARP, 1991). In another recently completed study of workers over the age of 50 obtaining new jobs, 62% of the sample were women (Brady and Fortinsky, et. al, 1989).

Although the Age Discrimination Act has made it illegal for an employer to force an employee from the work force because of age, the fact remains that what older workers do is retire - early and often permanently. There are many reasons for this. Leisure carries a high value for many Americans. Actual or probable job loss or change is another subtle but persuasive incentive to leave the work force. However, most people retire because they can. Early retirement reflects retirement resources - pension plans, unusually large lifetime savings - including gains in real estate values - Social Security benefits, and corporate incentives for early retirement (Herz and Rones, 1989). It should be no surprise that individuals who are able to combine pensions with Social Security benefits and savings perceive themselves capable of early retirement.

Health is another powerful predictor of early retirement. Parnes and Nestel (1975) reported that poor health is the major determinant of early withdrawal from work. This finding is particularly important due to the longitudinal nature of the data which allowed the researchers to measure health status both before and after retirement. Other studies have made similar conclusions about the importance of health as a factor in the decision among older workers to withdraw from the labor force (Foner and Schwab, 1981; Reno, 1976). A 1989 review cited health as the first in a list of major economic incentives to retirement - the rest being employer and public pensions, and wealth and earnings (Myers, 1991).

Thirdly, early retirement appears to be encouraged by both current Social Security policy and individual pension plans. Many private pension plans are integrated with Social Security, so that the benefits paid by the employer are determined both by the employee's earnings and work history and the level of Social Security benefits. A 1983 survey cited by



Herz and Rones found that more than one-third of the pension plans studied allowed for full benefits at age 55, usually with 30 years on the job. Another study found that in one group of plans, workers maximized the net value of their pensions by quitting at age 60 (Berry, 1989). Current retirement ages established by the Social Security Administration encourage retirement at age 65 with full benefits and age 62 with reduced benefits.

While data clearly indicate that full-time employment among older workers has declined in recent years, there is a high degree of both interest in and need for part-time work (Copperman and Keast, 1983; Brady et. al., 1987). It seems that older workers want some postretirement employment, but on their own terms. Women are the most likely to be working part-time, but men are making this choice in increasing numbers. In 1990, 44% of all employed men 65 and older chose part-time work, while the number of women was more substantial at 53%, according to the U.S. Bureau of Labor Statistics in 1991 (AARP, 1991). Many of the workers examined in this study are employed part-time.

### Barriers to Employment

While the trends for early retirement and withdrawal from the labor force are clear, there is a wide concern for promoting work opportunities for older individuals who need or desire to continue to work. In fact, after the initial fling at full-time golfing and fishing, many people find that they miss the intellectual stimulation, companionship, and increased self-esteem that work offers. They may also discover that they need supplemental income. The problem is that few people come to grips with the question of continuing to work until after they have retired. At that point they are in a much less flexible position to make a choice (Rock, 1989). Individuals in their later years who want to continue working often face myriad barriers to continued employment.

Brady et.al. (1987) reported that numerous barriers existed for older persons in Connecticut who want to work. Of those barriers associated with the actual lives and situations of the older individuals themselves, health and lack of transportation were the most important. Another "situational" barrier preventing many older people from successfully finding work is the demand made upon them by family caregiving responsibilities. In addition, health problems and doctor appointments can cause scheduling problems; the difficulty of finding employment that is flexible enough for their needs and lifestyle can discourage many potential workers (Hirsch, 1990).

The workplace itself also presents barriers to pursuing employment in later years. A major potential barrier to employment of older persons is a change in working conditions (i.e., closing of plant, discontinuation of a product line, major changes in the organization). For those presently working, 44% reported that a significant change in working conditions in their place of employment would cause them to stop working. For those who were presently not employed, 8% said that changes in working conditions actually did cause them to stop working (Brady et.al., 1987).

It is also possible that many older people do not seek employment because they see only very limited choices. They are often funnelled into the part-time job market, where the limitations are low pay and entry-level work. A study cited by Herz and Rones (1989) found that hourly wages tend to decline about 30 to 40% when weekly hours are reduced from 35 to 20. The primary reasons for the scarcity of well-paying part-time jobs is the high cost of such schedules to employers. As one analyst concluded, the main reason most people retire isn't to stop working, but rather to gain greater control over how they spend their time (Kiechel, 1990). An organization who can meet the retiree's need for suitable flexible part-time employment could begin to tap that large pool of older American workers who are willing to work.

In a recent report published by the Department of Labor entitled Labor Market Problems of Older Workers (McLaughlin, 1989a), the U.S. Secretary of Labor discussed numerous issues which affect older workers in America. These include unemployment, discouragement, displacement, low-wage employment, occupational segregation, labor market re-entry, pension inequities, and age discrimination. One conclusion reached in this report was that while older workers might be less likely than younger ones to lose their jobs (due, in large part, to the seniority system), when they do lose their job it takes them significantly longer to find a new one. Therefore, more research on the kind of jobs older workers seek and find and the meanings of "job success" in these matches is important (McLaughlin, 1989a). Such research requires looking at "job success" from the employer's point of view, as well as from the older worker's perspective.

### Attitudes Toward Older Workers

Employer attitudes toward the older employee have been given considerable attention recently in the gerontology and labor market literatures. The general conclusion is that work organizations are notably ambivalent toward older workers. Although organizational policies are generally set out and managed by executives who are themselves older, the policies are often structured in a way that motivates older workers to leave. Organizations tend to accord age and experience higher earnings, greater power, and better jobs. Yet being an older worker in many organizations often means being vulnerable and insecure (Schrank and Waring, 1989). The experience of being passed over for promotion because of age may leave the older worker alienated from the organization, with accompanying feelings of powerlessness, self-estrangement, isolation, and meaninglessness (Kelly, Chiesmir, and Lawrier, 1990). On the one hand organizations may say they value their older workers, but a system that promotes youth and encourages early retirement belies that fact.

For their part, older employees say their biggest problem is discrimination by would-be employers who underestimate their skills. Ageism in America is alive and well; older workers must deal with stereotyped thinking about their attitudes and abilities. They may have a hard time convincing supervisors and co-workers that they're not stubborn, persnickety or feeble (Hirsch, 1990). One analyst sees the convergence of fast-paced change



in business, an increasingly older population, and ageist thinking has resulted in the "Detroit syndrome" in regard to older workers: devalue them, discount them and dump them (Lawrie, 1990).

The holding of negative attitudes toward the older worker has been confirmed in a number of studies. The findings reflect the attitudes of subjects who were managers, employment interviewers, and undergraduate and graduate business students (Doering, Rhodes, and Schuster, 1983). Managers and business people appear to suffer from two major prejudices. First, they think of the aging process as uniquely linked to the chronological rather than biological age. They fail to understand that there is a substantial diversity of human capability at all ages, a phenomenon which is particularly true among the elderly. Secondly, there are deeply entrenched stereotypes about the traits of older persons generally and older workers specifically. Regarding the workplace, characteristics which are suspect are physical health, endurance, creativity, learning ability, and productivity (Harrick and Sultan, 1982). In addition, because many individuals have been the subjects of age discrimination jokes, some older workers have come to adopt society's view of their worth. They may worry they're too old to be trained. They may suspect they cannot mesh with younger fast workers. They may fear that they'll be unable to handle the physical demands of employment (Kelly, et. al., 1990).

In an often cited study, Rosen and Jerdee (1977) found that many managers exhibited age discrimination in their personnel decisions. They asked 6,000 readers of Harvard Business Review, most of whom were in management positions, to make management decisions in seven hypothetical cases. In half of the respondents' questionnaires, the worker in question was a younger person; in the other half, an older one. Except for the age of the workers, the scenarios were identical. Respondents consistently made different hiring, promotion, discipline, and training decisions based on the stated age of the worker in question. Yet, in a final set of questions, respondents indicated a very high level of support for non-discriminatory business practices. Of interest in this study was the finding that respondents age 50 and over were consistently more supportive of the older workers than were younger respondents. The authors thus concluded that an older worker's best prospect for fair treatment appeared to be working for an older supervisor. However, in a recent study supported by the AARP Andrus Foundation, Brady and Fortinsky (1989) found that the age of the supervisor was not of major importance in predicting employment success among older workers in new jobs.

One of the myths surrounding the older worker is that adults reach a point where they can't learn anything new. There may be a self-fulfilling prophecy at work here. Companies usually train and retrain younger workers, so that older workers frequently are not prepared to deal with changes in the organization that require new skills (Miller, 1989). However, training programs can succeed if suitable methods, styles, and instructional tools are adapted to the needs of the older worker (Kelly, 1990).

One study (Tucker, 1985) reported that workers age 60 and over showed a lower rate of interest in training than workers in their 40's and 50's. However, the same study reported no differences between men and women. Schrank and Waring (1989) reported that not only were there fewer training programs specifically for older workers in organizations they surveyed, but older workers were vastly underrepresented in training programs that were ostensibly available to everyone. In addition, organizations have not been creative or prudent in envisioning uses of the expertise and experience of older workers as training sources. In fact, Tucker (1985) suggested that there is strong underutilization of the older worker as a resource to provide on-the-job training to younger workers.

Rosen, et.al. (1981) studied performance appraisals among older worker. and found that age had a significant effect on rated desirability of promotion in the eyes of managers. Age also had a significant effect on rated desirability of transferring to a less demanding position. Other studies report that older workers often are skipped entirely in the performance appraisal process and are thus denied the opportunity to set the developmental goals that such reviews could provide (Schrank and Waring, 1989). Previous work by two of the authors of this report found "at a substantial number of older workers believed that promotional and evaluation issues were not applicable to them (Brady and Fortinsky, 1989). Sterns and Alexander (1988) reported that as much as 80% of the working population believe that organizations' personnel systems are generally biased against older workers. The supervisor is thus in a situation where people come to expect that performance appraisals will not be fair.

Little is known about how the supervising manager of older employees specifically views job success for these workers. It is obvious from studies already conducted that differences occur in some personnel practices as they apply to older as compared with younger workers. However, the explicit nature of employers' views of older workers as resources within the organization is not clearly known. It is also not apparent what supervising managers look for in older workers, and how such perspectives vary according to managerial and organizational characteristics. This research project has addressed these issues.

### **Employers' Views of Recruitment**

A recent study by the Commonwealth Fund found that there is a large, untapped pool of older Americans ready and able to work (Barth and McNanght, 1991). Research conducted by Louis Harris & Associates revealed an estimated 1.9 million available workers ages 50 to 64 (Hirsch, 1990). Some estimates say that by the turn of the century 100,000 workers over the age of 55 will return to the workforce every year (Spiers, 1990). The problem of age discrimination in hiring may be eliminated or tempered by the baby bust. The fact that the pool of new young workers is shrinking may lead to a new appreciation of older workers.

As organizations attempt to fill their ranks with workers of all ages, they may find that their recruitment policies and personnel practices actually discourage the labor participation of people over 50. One analyst listed these organizational changes as important to any recruitment campaign: making minor adjustments to the work site or job to accommodate physical limitations; restructuring jobs to allow such options as part-time positions, job sharing, flextime, home work and phased in retirement; offering benefits, especially if recruiting part-timers; and adapting training programs to the needs and characteristics of the older learner (Kelly, et. al., 1990).

One problem an older worker faces is similar to one all workers face - finding jobs that fit their skills. A recent survey found that respondents between the ages of 50 and 64 were most receptive to work using their special skills, but the proportion willing and able to undertake certain jobs dropped markedly when specific occupations were mentioned (AARP, 1991). Low-paying, physically demanding, dead end service sector jobs will be unlikely to attract people who are not motivated by economic concerns. Once the need to work has been eliminated, most workers become choosy about what they do (AARP, 1991). Some U.S. companies, such as R.J. Reynolds, Metropolitan Life, ARCO, and Travelers have a history of investing in the experience and skills of older workers. These companies have created flexible schedules and cafeteria-style benefit programs. Other organizations have pursued alternatives to traditional promotion, used intentional reassignments, and changed the gender-related allocation of jobs to maximize older workers (Achenbaum, 1989). This research explores the motivations and success of employers in recruiting and hiring older workers.

### **Specific Benefits to Hiring Older Workers**

Spiers (1990) reported that a poll of personnel directors found that 84% say that older workers are more productive than their younger counterparts. The same poll reported other reasons for hiring older workers: less absences, fewer on the job accidents, greater job satisfaction; fewer psychiatric problems, and fewer alcohol and drug related problems. Also, since employing an older worker usually involves providing health coverage for fewer dependents, in some cases employing an older worker can reduce an employer's health insurance expenses.

The recent downsizing and restructuring of American corporations has eliminated some full-time jobs while creating new part-time ones, which are the type of flexible employment most sought by older workers. Older workers come with established work habits. They are conscientious, and get favorable evaluations for loyalty, motivation, and dependability (Hirsch, 1990). A 1989 AARP study conducted by the Yankelovich Research Group found that human resource decision makers showed appreciation for the "work ethic" of older employees. This was characterized by a commitment to quality, loyalty and dedication to the company, and punctuality. Their emotional stability, practical knowledge, and ability to get along well with coworkers were also rated high (AARP, 1989). And one of the strongest selling points for hiring older workers is their flexibility - in their hours, wages, and duties. In addition, older workers generally attained a higher performance rating in a

shorter time than those hired before the age of 30 (Durkin, 1990). Ascertaining the aptitudes, skills and characteristics of older workers that are valued by employers and organizations is a major focus of this study. Hopefully, this research will serve older individuals, employers who hire them, and those who counsel, train, place, or otherwise advocate on behalf of the older job seeker and worker.

### **C. Organization of this Report**

The next major section of this report details the methodology used to meet the project objectives. This includes approaches to sample recruitment, data collection instruments and procedures, major variable definitions, and a profile of the sample population.

Section III presents findings related to the four major research questions addressed in this study. Based on results, Section IV draws conclusions and outlines recommendations for program practitioners who assist older persons in finding work, and for gerontological researchers interested in older workers.

Finally, a series of appendices present additional tabular data, sample recruitment correspondence, interview instruments with their question by question objectives, and other support material related to this project.

## II. PROJECT METHODOLOGY

### A. Introduction

This portion of the report describes how samples of Directors of Human Resources (DHRs) and Supervisors of older workers were selected from employers in Connecticut, Maine, and New Hampshire to address the four research questions specified in Section I. Data collection procedures and instruments are also summarized in this section, followed by presentation of operational definitions used to measure major research variables. Finally, a description of the samples of DHRs and Supervisors is provided as an introduction to the major findings detailed in Section III.

As in our previous study of older workers funded by the AARP/Andrus Foundation (Brady and Fortinsky, et. al, 1989), we defined older workers as persons 50 years or older who worked a minimum of 10 hours per week. Also, employers were eligible for participation in this research if they had hired any older workers since January 1988. These criteria allowed us to retain consistency with our earlier study, and also minimized any recall bias among responding DHRs and Supervisors about their policies and experiences regarding older workers.

### B. Sample Recruitment

The goal of this research was to complete telephone interviews with one hundred (100) DHRs and 100 Supervisors from Connecticut, Maine, and New Hampshire. Through a two-stage sampling process, a total of 105 DHR interviews and 113 Supervisor interviews were successfully completed.

#### 1. Selection of Employers and DHRs

The initial older workers study carried out by the authors took place in Connecticut and Maine, and yielded a sample of 116 employers who had hired older workers since January 1988. Older workers from these employers had been referred to the research team by four major sources: Senior Community Service Employment Program (SCSEP) contacts; the Job Training and Partnership Act (JTPA) contacts; local Job Service Programs located at Bureaus of Employment Security and Area Agencies on Aging; and private companies. This list of employers included 64 from Connecticut and 52 from Maine. New Hampshire was added to this study in order to diversify the sample.

The strategy for selecting DHRs was to mail them a letter introducing the study, a project summary, and a response postcard. Copies of these forms are included in Appendix C. Followup letters and telephone calls to DHRs not responding to the initial mailing were used to maximize the response rate.



In Connecticut, 33 of the 64 DHRs who were mailed project information returned the postcard stating a willingness to be interviewed. Telephone interviews were completed with 28 of these Connecticut DHRs, the remainder being excluded due to ineligibility or refusal to complete the interview once it had begun.

In Maine, sample selection was more complex. The mailing to 52 DHRs from the original sample of employers yielded a total of 23 completed interviews, which was insufficient for meeting the goal of 50 set for Maine. A second sample of Maine employers was obtained from the Bangor Personnel Association. This proved to be a highly successful source, as 15 completed DHR interviews were obtained from the sample of 21 employers. Finally, a list of employers sorted by company size was provided by the Maine State Chamber of Commerce and Industry. Random samples were selected and DHRs from these samples were mailed project information. As a result of two mailings to a total of 102 randomly selected employers, an additional 14 telephone interviews were completed. Overall, a total of 52 DHR interviews were completed in Maine as a result of this sample selection process.

In New Hampshire, project team members initially met with representatives from several organizations that work with employers of older workers, including Green Thumb, Inc., local and regional AARP representatives, SCSEP staff, and the Community Action Program of Belknap and Merrimack Counties, Inc. A total of 51 employers were identified by these sources, and 20 DHR interviews were completed from this group of referrals. An additional 5 DHR interviews were completed as a result of a mailing to 33 companies selected randomly from a list of New Hampshire's 100 largest manufacturing companies. This list was selected in order to balance the overrepresentation of health and social service employers from the initial contacts in this state.

In summary, a total of 105 DHR interviews were completed, including 52 in Maine, 25 in New Hampshire, and 28 in Connecticut. A more detailed breakdown of the timeline and results from the employer and DHR selection process is included as Appendix E.

## 2. Selection of Supervisors

The second stage of sampling involved selecting direct Supervisors of older workers. Although DHRs were able to provide information about general hiring practices, they were not usually in a position to report about the performance of older workers in their companies. It was determined that a more comprehensive profile of employers' views of older workers could be obtained by interviewing direct Supervisors in addition to DHRs. The goal was to interview one Supervisor by telephone at each company where a DHR also was interviewed.

Supervisor selection was initiated by asking DHRs at the end of their telephone interviews for the names of persons who directly supervised one or more older workers hired since January 1988. The only other selection criterion was that the supervision must have taken place within the previous six months to minimize recall problems. Interviewers were

instructed to request up to three Supervisor names. In these cases, project staff randomly selected one Supervisor to be interviewed. Only two DHRs refused to provide names of Supervisors at this stage of the research.

Each selected Supervisor was then notified by postcard that he/she had been identified for participation in this study. Supervisors were told that they would be called within the next 2-3 weeks, and that they should contact project staff if they were unwilling to participate (see Appendix C). It is believed that this prenotification step contributed to a very low refusal rate of approximately 1% (one refused) among selected Supervisors.

At some companies where a DHR interview was completed, it was not possible to obtain a Supervisor interview for two reasons: no supervisor had overseen an older worker in the previous six months; or the sole eligible supervisor refused or was otherwise unavailable for interview. In these instances, a replacement was selected from the pool of additional supervisors identified at other companies. Therefore, a small group of companies had more than one supervisor participate in this research.

As a result of these procedures, a total of 113 supervisor interviews were completed. When DHRs and Supervisors were matched by company, a total of 97 companies contributed both a DHR and at least one Supervisor interview.

### **C. Data Collection Instruments and Procedures**

#### **1. Instrumentation**

The research design called for designing two data collection instruments, the first to be used as a telephone interview schedule with sample DHRs and the second for use as a telephone survey instrument with sample supervisors.

The primary objectives of the DHR interview were to: determine whether employers looked for special qualities in older workers; determine how important specific qualities were to DHRs at the time they were considering hiring older workers; learn whether any of these qualities were unique to older workers compared to younger workers; learn about employers' policies regarding training, promotion, and other benefits for older workers; and determine what benefits and liabilities DHRs saw for their companies when considering hiring older workers. Demographic and other characteristics of DHRs, of the companies they represented, and of the older employee workforce were also obtained during this telephone interview. A copy of the complete DHR interview is found in Appendix D. The average length of DHR interviews was 27.18 minutes.

The Supervisor interview focused on one specific older worker who reported directly to the Supervisor, either currently or in the previous six months. In order to minimize selection bias, Supervisors were asked by project interviewers to list up to three such older

workers, and a protocol was provided to interviewers allowing random selection of one employee from among those mentioned. The major objectives of the Supervisor interview were to: assess the Supervisor's view of the older worker's personal qualities concerning work; determine how satisfied Supervisors were with specific aspects of the older worker's on-the-job performance; and learn about the characteristics of the job held by the older worker. Questions about the demographic profiles of Supervisors and the older workers were also asked during this interview. A copy of the complete Supervisor interview is found in Appendix D. The average length of Supervisor interviews was 19.4 minutes.

Both survey instruments were programmed into the Computer Assisted Telephone Interviewing System (CATI) at the Human Services Development Institute's survey research center, which allowed interviews to proceed smoothly because of pre-programmed skip patterns depending upon responses from interviewees. The CATI system was also used successfully in the previous older worker study funded by the AARP/Andrus Foundation (Brady and Fortinsky, et. al, 1989).

## 2. Interviewer Training

Separate training sessions were held for conducting the DHR interview (in October 1990) and the Supervisor interview (February 1991). All interviewers used in this project had previous experience with telephone survey research, and had gone through required training in telephone survey techniques. For this project's specific interview schedules, detailed Interviewer Instructions were designed and then reviewed during training sessions. Copies of these question-by-question objectives may be found in Appendix D.

Interviewers were monitored throughout the data collection process. The protocol involved periodic assessment of questioning and probing techniques by the project's research assistant, with feedback provided to interviewers whenever necessary.

Interviewer debriefing sessions took place after the completion of the DHR sample, and again after completion of the Supervisor sample. These sessions aided in assessing the quality of selected responses, interpreting narrative responses, and planning data analysis strategies not previously anticipated.

## 3. Data Editing, Coding, and Processing

These steps in data management were made much more efficient by the use of the CATI system. Interviewers entered responses directly into a computerized version of the survey instrument, either in coded or narrative form. Pre-programmed valid codes for each question enabled simultaneous editing of coded responses. Completed interview data were transferred to diskettes, and then uploaded into the IBM mainframe computer at the University of Southern Maine. The Statistical Analysis System was used for all data modification and analysis procedures. Finally, project staff met numerous times to develop coding systems for all narrative responses, which were then added to the SAS data base.



#### 4. Site Visits

The Principal Investigator and Project Director conducted site visits to five (5) employers in Maine and New Hampshire for the purpose of gaining deeper understanding of how newly hired older workers are integrated into the workforce. The 5 organizations were chosen to represent the diversity in size and industry type of the sample as a whole, as well as by particularly noteworthy responses from DHRs or Supervisors during the telephone interviews. Types of companies chosen for site visits included telecommunications, health care, tourism-related, professional/legal, and manufacturing.

At each site, meetings were held with DHRs and/or Supervisors who responded to the telephone interviews. Standard questions were designed for all meetings, and site-specific questions were added whenever appropriate. A copy of the site visit interview questions used at all sites is included as Appendix D.

#### D. Major Variable Definitions

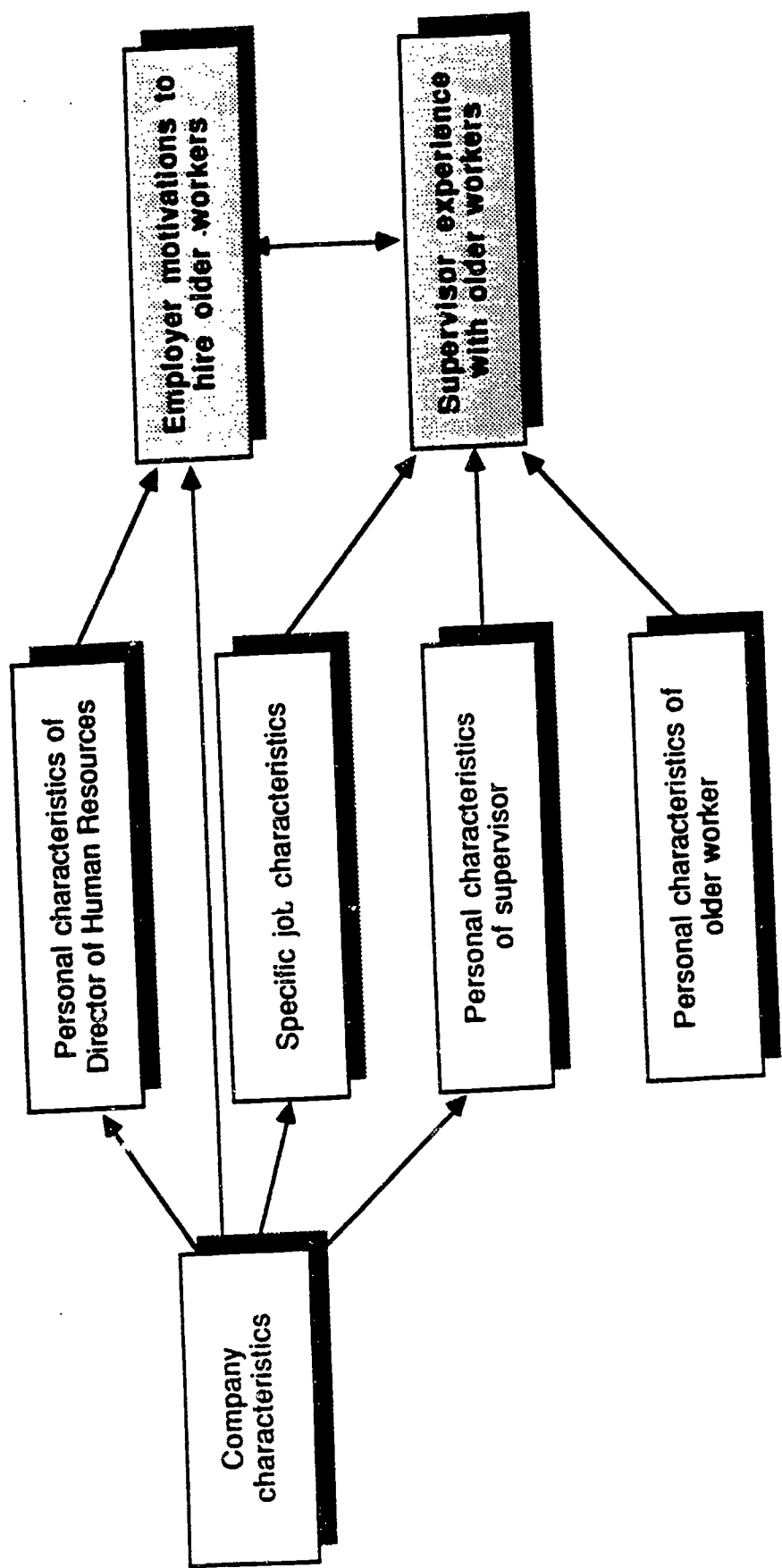
##### 1. Dependent Variables

The overriding issue addressed in this research was how older workers are viewed and valued by their employers. Two perspectives from employers were chosen in order to learn about: (1) general employer motivations and expectations among employers related to hiring older workers; and (2) specific reactions to supervising older workers on a daily basis. These perspectives represent the major dependent variables in this project. Figure 1 summarizes the factors believed to influence these two dependent variables. This section of the report summarizes how these dependent variables were operationalized, and the following section highlights the major independent variables used in data analyses to answer the four research questions and test relationships illustrated in Figure 1.

##### a. DHR Motivations-to-hire

This variable examined the employer's perspective regarding motivations and expectations in hiring older workers. The DHR interview was the source of data for measuring this dependent variable. Of interest here were the types of personal qualities employers looked for when interviewing older adult applicants for positions, as well as whether DHRs believed there were special benefits or liabilities to hiring older workers. Both "intrinsic" qualities such as reliability and willingness to learn new things, and "extrinsic" qualities such as whether applicants were primarily driven by fringe benefits or part-time work, were expected to influence DHRs in the hiring process. In previous research, it was found that both types of issues were important to older workers in new jobs (Brady and Fortinsky, et. al, 1989). Also of interest was whether employer motivations to hire older workers were different from those for hiring younger workers. These issues are at the core

**Figure 1**  
**Conceptual Model for the Research\***



\* See text for variable definitions.

of the first two research questions addressed in Section III: (1) What motivates employers to recruit and hire older workers?; and (2) Do employers have different motivations-to-hire depending on the specific characteristics of the organization or DHR?

The DHR interview included both open-ended and fixed-choice questions to measure "motivations-to-hire" older workers. The open-ended questions included: whether there were "special qualities your organization looks for when recruiting and hiring older workers?"; and whether these were different from qualities sought in younger workers (see Appendix D, Director of Human Resources Survey, Questions 2-3a). Results of these responses were subjected to content analysis in order to examine common themes reported by DHRs. Next, DHRs were asked to rate how important a series of specific personal qualities were at the time of hiring, on a scale from "very important" to "not at all important" (Appendix D, Director of Human Resources Survey, Questions 4a-4m). Factor analysis techniques were used to reveal underlying dimensions of DHR motivations based on their responses to this set of items. Four (4) factors were identified, which were used as major dependent variables to answer the first two research questions. Individual items were also rank ordered by assigning scores to levels of importance, and selected items were also used as dependent variables when they helped clarify understanding of patterns in the data.

DHRs were also asked open-ended questions to examine whether "employing older workers has specific benefits for your organization", and whether they saw any "liabilities to your organization from employing older workers" (Appendix D, Director of Human Resources Survey, Questions 18-19a). Common themes were grouped based on content analysis of DHR responses to these questions, and are summarized in Section III of this report.

#### b. Supervisor Experiences

This dependent variable refers to the perspective of the immediate supervisor who has daily or weekly contact with older workers once they are hired. In the literature on older workers, this perspective is not commonly addressed, making this research a pioneering effort in examining the employer's view on the value of older workers. The source of data to measure this variable was the Supervisor interview.

Supervisors were asked two series of fixed-choice questions about an older worker selected as described in Section II.B.2 above. The first series tapped the personal qualities of the older worker by asking the Supervisor about such issues as willingness to learn new things on the job, creativity, commitment, physical stamina, and attitude about work. For each item Supervisors rated the older worker on a range from "strongly agree" to "strongly disagree" (Appendix D, Direct Supervisor Survey, Questions 1a-1h). The second series addressed the older worker's job performance, and Supervisors were asked about their level of satisfaction with the worker's abilities (Questions 3a-3h). Neither set of items formed significant factors as a result of factor analysis; therefore, individual items in each series were used as separate dependent variables to address the final two research questions: How

satisfied are Supervisors with older workers in their companies?; and How do Supervisors' experiences vary depending upon the type of industry, and by characteristics of the Supervisor, employee and job?

Open-ended questions were also asked to tap Supervisors' satisfaction with older workers. For both series of questions above, they were asked whether and how any older worker attributes were different from those for younger workers (Questions 2a, 2b, 5a and 5b). Themes were grouped here as well and discussed in narrative form. Finally, an overall satisfaction question was included, followed by an open-ended question about why that level of satisfaction was reported (Questions 4a and 4b).

## 2. Independent Variables

As Figure 1 indicates, a number of factors were expected to influence the dependent variables summarized above. The remainder of this section briefly describes measurement approaches for these variables. Specific interview items used as the source of measurement may be found in Appendix D, the DHR and Supervisor interview schedules.

### a. Company Characteristics

Specific company characteristics used as independent variables to address research questions 2 and 4 included: company size; type of industry; and whether or not the company had innovative job design features for its employees. The DHR interview was the source for these variables. Responses about type of industry were grouped according to standard industry (SIC) codes used by the U.S. Census Bureau (Standard Industrial Classification Manual, Executive Office of the President, Office of Management and Budget, 1987).

### b. Personal Characteristics of DHRs

Sociodemographic characteristics of DHRs included: age; gender; educational background; length of employment with the company; length of time as DHR; and previous experience recruiting and hiring older workers. These variables were expected to influence their motivation-to-hire older workers independent of company characteristics.

### c. Personal Characteristics of Supervisors

The same characteristics were included for Supervisors as described above for DHRs. In addition, Supervisors were asked about the number of hours per week that they supervised the older worker discussed in the interview.

### d. Personal Characteristics of Older Workers

Sociodemographic characteristics included: age; gender; marital status; educational background; and whether or not he/she had caregiving responsibilities for dependent

relatives. The salary or wage was also ascertained, as well as the health status of the older worker.

e. Job Characteristics

Finally, a series of questions were asked in the Supervisor interview about the specific job at which the older worker was employed. Items included: part-time or full-time; seasonal/temporary or year-round; and a group of statements about the job that Supervisors were asked to agree or disagree with, including whether the job allowed freedom of decision-making, required a high level of skill and experience, and required communication skills (see Appendix D, Direct Supervisor Survey, Questions 21a-21i).

E. **Profiles of Sample DHRs and Supervisors**

Based on the sampling strategies described above, final sample sizes of 105 DHRs and 113 Supervisors were interviewed by telephone. Table 1 provides a sociodemographic profile of sample DHRs and Supervisors for easy reference as findings are reviewed.

**TABLE 1**

**PROFILES OF DIRECTORS OF HUMAN RESOURCES (DHRs) AND SUPERVISORS**

Characteristic	DHRs	Supervisors
Sample Size	105	113
Percent Female	59%	52.2%
Median Age	42 years	45 years
Age Range	26-71 years	24-81 years
<b>Level of Education</b>		
High School or Less	9.5%	30.1%
Some College	23.8%	22.1%
College Graduate	66.7%	47.8%
Median Length of Time in Position	42 months	59 months
Range of Time in Position	4-473 months	6-420 months
Percent with Previous Experience with Older Workers	43.8%	44.2%

Table 1 indicates that nearly 59 percent of DHRs and 52.2 percent of Supervisors were female. The median age of DHRs was 42 years, with a range between 26 and 71

years. Among Supervisors, the median age was 45 years with ages ranging from 24 to 81 years. DHRs as a group achieved a higher level of education than direct Supervisors. Fully two-thirds of DHRs reported at least a college degree, compared to about one-half of Supervisors. A few Supervisors reported less than a high school education.

Looking at their job experiences DHRs were in their current positions an average of 42 months, or nearly 4 years, at the time of our telephone interview. DHRs reported a very wide range of tenure at their current jobs, from 4 months to nearly 40 years. Among Supervisors, the average length of time at their current job was 59 months, ranging from six months to 35 years. Finally, nearly identical percentages of DHRs and Supervisors (44 percent) reported previous experience hiring or supervising older workers, as Table 1 indicates.

We now move to our detailed findings related to the four research questions posed at the start of the study.

### III. FINDINGS

#### RESEARCH QUESTION #1: *What motivates employers to recruit and hire older workers?*

The first major research question we examined in this study asks what factors motivate organizations to hire older workers. We interviewed directors of human resources (DHR's) in the sampled companies to answer this question. DHR's are most often in the position of carrying out their organization's employment policies. Among middle-sized and smaller companies, DHR's are usually responsible for hiring personnel and establishing recruitment and hiring policies as well.

The interview questions designed to answer this first research question were:

- \* Does your organization actively recruit older workers to fill job openings?
- \* Are there any special qualities your organization looks for when recruiting and hiring older workers? If so, what are those qualities?
- \* Are these different from special qualities your organization looks for when hiring and recruiting younger workers, that is, those workers younger than 50 years of age?
- \* What special qualities do you look for in younger workers?
- \* Do you believe that employing older workers has specific benefits for your organization? If so, what are those benefits?
- \* Are there any liabilities of employing older workers? If so, what are they?

The DHR interview began with questions about whether or not organizations actively recruit older workers and whether or not organizations look for special qualities in older workers. The results of these questions are reported in Table 2.

TABLE 2

#### RECRUITMENT OF OLDER WORKERS BY DIRECTORS OF HUMAN RESOURCES

Item	Percent "Yes"	N
Organization actively recruits older workers	49.5	105
Organization seeks special qualities in older workers	62.3	105



Of 105 directors responding, 52 (49.5 %) said they did actively recruit older workers into their organization. Actively recruiting was defined as the organization making a conscious effort to hire older workers.

Of the DHR's responding to the question about whether their organizations sought special qualities in older workers, 62.3% said "yes." The 66 respondents who answered in the affirmative were then asked to talk about these special qualities.

It is important to note that this open-ended question was asked before DHR's were asked whether the qualities they sought in older workers were different from those sought in younger workers. This ordering allowed respondents to discuss employee qualities when older applicants meet specific needs or company personnel requirements. A number of DHR's explicitly stated that they seek these specific qualities in most new hires but generally have found them to be more available among older workers.

Seven themes emerged from a content analysis of open ended responses to the question about qualities of older workers that motivate employers to hire them. The presentation of these themes is made for clarity of expression and in order to draw a picture of what DHR's seek when hiring older workers, and are not rank-ordered by prevalence of occurrence or other quantitative criteria. These seven themes were:

- \* worker reliability
- \* flexibility
- \* experience
- \* motivation
- \* personal integrity
- \* ability to work effectively with people
- \* physical characteristics

The first theme that emerged from responses to this open-ended question was the *reliability* of older workers. DHR's praised their punctuality, work ethic, sense of responsibility, and overall dependability as employees. This finding is consistent with both scholarly and more popular literature, where reliability is discussed as an acclaimed attribute of most older workers (Hale, 1990; Fyock, 1990).

There were several interesting nuances in the reporting of this reliability factor. Employers liked the attentiveness of older workers, as one DHR put it, their "ability to stick with a job and focus on it."

The general stability of older workers translated for one respondent into a desire for geographical permanence. The older workers she wanted were people who are "committed to the area and won't be moving to a warmer climate on us." Perhaps this comment was made because of the frequently voiced belief that many older Americans leave the northeast for southeastern and southwestern areas of the United States after retirement. It could also



relate to the longstanding trend of younger workers moving from their homes of origin to places where employment opportunities are more promising. Given the New England location of sample DHR's, these responses reflect a broader concern for employee longevity when considering older workers for positions in their companies.

A second special quality reported by DHR's in their selection of new older workers was *flexibility*. One DHR preferred "those who are flexible in work schedule and also in accepting different assignments." Another commented that he liked workers who could handle "a hectic atmosphere with multi-tasking." A person's willingness to do a variety of things on the job was cited by numerous DHR's as an important work quality. Included in flexibility is a worker's availability for and interest in part-time employment, "off-shift" work, and overtime.

A third theme reported by DHR's was the *general experience* of older workers as an important attribute in the decision to hire. In some cases this meant specific experience with the job for which an individual was being hired, but a number of directors spoke more generically. Examples include: "Experience, maturity, and general knowledge is what we want"; and "demonstrated longevity at previous jobs gives the older worker an advantage in our eyes." Other respondents talked about the overall maturity of older workers being a favorable factor, "not just their job related experience but their life experience."

A more detailed accounting of the effects of experience was reported by a manufacturing DHR during one of our face-to-face site interviews:

"I have two retired military people - they were 25-year men. Both were young when they got out of the service and one was fairly high up when he took our position. He told me, 'I've had my decision-making days. I want to work eight hours, make a reasonable wage, have benefits, and go home and enjoy it.' He didn't want to take his work home with him, and that's why he took the job he did. He's turned down salaried positions because he doesn't want to make decisions. He couldn't imagine how many decisions he makes because he's looked upon as the father of the mail room. His fellow workers follow his advice because they trust him and look up to him. He hasn't been here that long, but he is already greatly respected and valued.

Fourthly, the general *motivation* of older workers was cited as a special quality employers look for when they hire. Their enthusiasm, interest levels, and overall work ethic were frequently cited. They are "willing to work the extra," reported one DHR. Older workers' general willingness to be helpful and to work in a committed and disciplined manner were often cited.

A fifth factor emerging from this analysis was *personal integrity*. Several directors pointed to the need for workers who can maintain confidentiality in their positions, and older workers appeared to excel in this regard. Several others noted the importance of being able to deal honestly and openly with authority figures, particularly in the often sensitive situation

when superiors are significantly younger than the worker her/himself. This is often done in unionized industries. One DHR said this: "In our highly structured unionized plant, we have strict rules and regulations. If an 18-year old was hired yesterday and a 60-year-old today, that 18-year old is senior and can tell the 60-year old what to do." While, the DHR admitted, this can cause problems, older workers often handle such situations tactfully.

A sixth theme cited by numerous DHR's in a wide variety of ways was the quality of being able *to work effectively with people*. Affability, compassion, and taking a genuine interest in people are highly regarded traits. "We do look for people who are not easily flustered by many people," reported one director. "Getting along well with the public is very important to us," stated another. Several DHR's in education and human service agencies spoke of being able to get along well with children as a necessary quality for successful employment in those particular organizations. Having a sense of humor, being courteous, and "someone who is bright and cheerful and can fit into our organization" were also reported as important special qualities.

A seventh and final quality is of particular interest because it is counter-intuitive. DHR's cited *physical characteristics* as special attributes of the older worker. "They have the physical capacity to perform duties," said one director. Several said the older workers they hired had the physical capacity required to do their jobs well. A special kind of physical attribution is that of appearance. One security guard company was concerned that their workers look good in a uniform, weight control and hairstyle being important functions of appearance. Evidently older workers fit the bill just fine. One DHR noted that "lifting" was an important aspect of work that he hired older workers to perform.

This open-ended question was followed by a question that asked the DHR if these special qualities their organizations looked for in older workers were different from those they sought in younger workers. Only 13 people responded "yes" to this question. Of the seven themes already enumerated, the first three, "reliability," "flexibility," and "experience" were the characteristics most often cited by these DHR's.

Numerous DHR's, both here and elsewhere during the interview, went out of their way to explain that they sought the same qualities in older workers that they did in younger ones. We believe DHR's were especially guarded in their response to this question due to concern about appearing to be discriminatory about either older or younger workers. This guardedness surfaced even more clearly in the face-to-face site interviews where more time was spent with five DHRs. The sense derived from these interviews was that DHR's highly value and may prefer older workers, but that they realize they must comply with governmental regulations concerning equal opportunity employment.

Some organizations, however, explicitly differentiated between older and younger new hires and sought selected attributes from the latter. Special qualities DHR's reported that their respective organizations looked for in younger employees were characteristics such as

greater career potential, academic degrees and other formal credentials, "trainability," a variation of this being "willingness to learn," computer literacy, and higher energy levels.

These open-ended questions were followed by a series of thirteen (13) fixed response questions that asked the DHR to consider specific employee qualities. DHR's were asked to judge how important it was for their organization that older job applicants (age 50 and older) showed these qualities at the time they were interviewing for an opening. We shall call these qualities "DHR motivations-to-hire." The response choices regarding each quality were "very important," "somewhat important," "not very important," and "not at all important." The Computer Assisted Telephone Interview program used in our interviews randomized the start of these 13 items in order to minimize the risk of response-set bias.

Table 3 reports the rank ordering of these DHR motivations-to-hire by mean, with lower values signifying greater importance attached to those attributes by DHR's.

**TABLE 3**  
**RANK ORDER OF DHR MOTIVATIONS-TO-HIRE**  
(N - 105)

Older Worker Quality	Mean	S.D.
1. Flexibility in tasks	1.34	.584
2. Learn new things	1.36	.501
3. Adapt to new technologies	1.47	.589
4. Make independent decisions	1.63	.574
5. Use skills from previous jobs	1.68	.763
6. Creative problem solving	1.70	.664
7. Flexibility in hours worked	1.72	.837
8. Seek permanent placement	1.98	.940
9. Exhibit aggressive/competitive spirit	2.32	.931
10. Seek promotion and advancement	2.67	.891
11. Seeking fringe benefits	2.87	.971
12. Seeking income to supplement retirement benefits	2.91	1.056
13. Want medical insurance	2.92	1.080

\* Means computed by assigning values: 1 - very important; 2 - somewhat important; 3 - not very important; 4 - not at all important.

There was little variation in responses to many of these items. Most DHR's reported that each of these attributes was "very important" or "somewhat important" to their organization in the decision to hire. For example, on the "flexibility in tasks" item, 71.7 % of the respondents said this was "very important," 22.6 % said it was "somewhat important," and 5.7 % said "not very important." There was even less variation on the second ranked (by mean) item, willingness to learn new things. All but one DHR responded that this was either "very important" (65.1 %) or "somewhat important" (34 %).

As can be seen by the standard deviations reported in Table 1, greater variation in responses existed among items such as exhibiting an aggressive/competitive spirit (44.3 % reporting this was "not very" or "not at all important") as well as a number of other variables (seeking permanent placement, seeking promotion and advancement, fringe benefits, medical insurance).

Conceptually, this list of DHR motivations-to-hire can be broken down into three categories. First, there are those attributes which describe more or less pure personal qualities, part of the "intrinsic" nature of the individual worker. These items include willingness to learn new things, making independent decisions, and exhibiting an aggressive/competitive spirit (characteristics inherent in the worker her/himself that would be present in any employment circumstance). Secondly, there are those qualities that have to do with "extrinsic" or structural aspects of the work itself, i.e., income, the permanence of the job, the fringe benefits available (medical insurance and other benefits), and the opportunities present for promotion and advancement. And finally, some items appear to describe the fit between the individual worker and the workplace. Characteristics such as flexibility in tasks, adapting to new technologies, flexibility in hours worked, use of skills in previous jobs, and creative problem solving describe aspects of adaptiveness and responsiveness of individual workers to the specific requirements (needs) of the workplace.

Factor Analysis run on these 13 items revealed a partial confirmation of this conceptual pattern. Four factors emerged from this analysis, as shown in Table 4. This table lists specific motivations-to-hire which most directly reflect the meaning of the factors.

We have named these four factors "Extrinsic: Full-Time," "Extrinsic: Part-Time," "Intrinsic: Personal Characteristics," and "Intrinsic: Fit." This finding suggests that DHR's distinguish between extrinsic qualities identified with full-time vs. part time work. Job flexibility and a desire by older applicants to supplement their (presumably Social Security) income tend to characterize part time work, while medical insurance and other fringe benefits represent full time job-related motivations-to-hire. The remaining two factors focus on generic personal qualities and on qualities which would fit directly with the needs of the job.

TABLE 4

SUMMARY OF FACTOR ANALYSIS OF EMPLOYEE CHARACTERISTICS  
CONSIDERED BY DHR'S AT THE TIME OF HIRING\*

Factor 1 Extrinsic Full-Time	Factor 2 Extrinsic Part-Time	Factor 3 Intrinsic Personal Characteristic	Factor 4 Intrinsic Fit
Seeking Fringe Benefits (.858)	Flexible Hours Worked (.717)	Make Independent Decisions (.828)	Willing to Learn New Things (.826)
Wants Medical Insurance (.880)	Supplement Income (.630)	Creative Problem Solving (.696)	Adapt to New Technologies (.828)

\* Principal components analysis with orthogonal rotation. Only items factor coefficients of .50 or greater under each factor are shown in this table for emphasis. All items were used in assigning factor scores to each DHR in the sample.

These four "motivations-to-hire" factors will be used as dependent variables in analyses presented to answer Research Question #2 below.

Several additional questions were asked of DHR's to ascertain their perceptions of the value of older workers. In response to the question, "Do you believe that employing older workers has specific benefits for your organization?," all but one DHR (99.1 %) responded "yes." A follow-up question asked the DHR to describe these benefits. A theme analysis of these open-ended responses was conducted. Seven theme patterns emerged, some of which resemble DHR's responses to the earlier question about what qualities organizations seek in hiring older workers. We shall present new ideas (not presented earlier in this section of the findings) before we name those that more or less replicate previously stated themes. Once again we have not ordered these by prevalence or any other quantitative standard. These themes are:

- \* sound business sense
- \* intergenerational effects
- \* creativity/problem solving
- \* overall work and life experience
- \* reliability
- \* motivation
- \* disposition

The first theme that emerged was that it made *sound business sense* to hire older workers. Some respondents talked about being able to hire two part-time people to fill one position and still take advantage of the experience of older workers. The issue of not having to provide medical insurance for some older workers was raised. "They don't want raises," said the personnel manager of a country club. And older workers helped to bring in new business. "They are ambassadors for our company" and "They help to attract other older people as clients" were two manifestations of this belief.

A second benefit clustered around the theme of *intergenerational effects*. One aspect of this was the mentoring capacity of older workers with younger personnel in organizations. They are also "examples to younger workers with their work ethic, positive attitude, and perspective . . . Young people listen to the older worker." One educator liked hiring elders because they "gave a broader generational exposure for the school children." One DHR said it this way: "The older workers are wonderful role models for younger workers because of their work ethic, showing up on time, doing assigned jobs, understanding the chain of authority . . . but nevertheless they tend to underestimate their own values and ability."

A third theme has emerged from this question was *creativity/problem solving ability*. "They bring new ideas." Older workers' patience and experience allow them to stick with difficult situations and work them through to solutions without giving up. The DHR of a small company (whose president is 72 years of age) summed up the value of older workers this way: "They bring quality of life to our organization."

Other themes that arose from analysis to responses to this question mirrored ideas already presented. However, because they were voluntarily offered by DHR's within a different context in the interview, we shall present them here. A fourth specific benefit from hiring older workers is their *overall work and life experience*. In addition to numerous references to the word "experience," DHR's developed and nuanced implications of this for their workplace. "They need less supervision," reported one. "They have sound judgment and wisdom," said another. A third reported how the experience of older workers allows them to capably handle difficult situations.

A fifth theme was the *reliability* of older workers. "They are more stable." The overall stability of elders allowed one respondent to observe that they tend to handle stress better than younger workers. Directors also talked about how older workers tend not to call in sick as frequently as others and that they are more place-bound and consequently can be depended on to be around for the longer term. One DHR listed numerous attributes associated with stability in one heavily loaded line: "We see lower turn-over, less absenteeism, better quality of work, and experience accepting responsibility."

Sixth, the overall *motivation* of the older worker was praised. Caring about their work, having an overall healthy work ethic, being enthusiastic, and having an eye for detail were all issues raised within this category. "They have great pride in their work and are



usually here because they want to be." One respondent compared older workers who want to be satisfied in their job with younger people who are more interested in careers.

The seventh and final benefit of hiring elders into an organization was the older worker's *disposition*. "Willingness to do all sorts of chores without being directed" and "being appreciative of their job" were typical responses. Older workers' patience, congeniality, and good natured demeanor were noted by numerous directors. One DHR summed up this point in two words: "Great people."

Finally, we asked DHR's the question, "Are there any liabilities to your organization from employing older workers?" As Table 5 indicates, forty DHR's (37.7 %) responded "yes."

Interviewers asked DHR's to explain these liabilities and we then conducted a theme analysis of their responses. Four themes emerged from this answer. These were:

- \* general health status
- \* injuries
- \* short duration
- \* money

TABLE 5

**DHR RESPONSES TO THE QUESTION:  
"ARE THERE ANY LIABILITIES TO YOUR ORGANIZATION  
FROM EMPLOYING OLDER WORKERS?"**

Response	Frequency	Percent
Yes	40	37.7
No	65	62.3
TOTALS	105	100

The most frequently voiced liability was that of the *general health status* of older workers. Respondents spoke about the inability of older persons to perform physically demanding work in the same capacity as younger people. They spoke about how some chronic conditions, such as arthritis, appear to get worse and become more debilitating. Several mentioned older workers' health causing reduced energy levels. "There are more illnesses and it often takes them longer to recover," said one director. Another reiterated this point: "Once they get sick, there is significant loss of time." A few people who responded "yes" to the question hedged a bit when asked to explain their perception of liability. "There are greater chances of illnesses with older workers, but we haven't seen

this happen yet." Another said this: "It could be hard on us if illness became a problem with an older worker. But actually the same is true for a younger associate."

A second but related liability was specifically in the area of *injuries*. "Older workers are more prone to falling down outside in bad weather." "We are worried about recurring injuries, for example, bad backs." "It takes longer to recover when an older worker injures himself. But we've actually had small incidence of such injuries . . ." Another DHR reported that older workers were more prone to automobile accidents.

Thirdly, the issue of *short duration* among older workers was raised. One respondent mentioned a high turnover rate among older hires. Two other DHR's appeared to be worried that several valued older workers would retire before the expected time.

Fourthly, *money* was raised as a liability. Higher insurance costs was an issue voiced by a number of DHR's. One company entertaining the idea of rehiring its own retirees was concerned about what this would mean for its workers' compensation costs. "The cost of self-insuring the older worker is greater for us . . . especially the cost of life insurance," said the human resource director of a private training and development agency. An educational personnel manager put it this way: "Medical costs do increase, particularly with people who smoke. Health problems have a way of catching up to us."

### Summary of Research Question 1

Several summative points may be made at this time. These ideas will be further developed as we move through analyses of findings for the three other research questions.

- (1) Directors of Human Resource Development in our study sample of 106 New England employers were motivated to hire older workers for many of the reasons suggested in much of the employment literature to date, i.e., their reliability, rich experience, work ethic, and general excellence as employees. The positive aspects of hiring older workers appeared to strongly outweigh the negative ones. This research thus far seems to be confirmatory of much of the other research published on the value of older workers.
- (2) Both in the telephone interviews used to collect these research data and the five face-to-face (on-site) follow up interviews, there appeared to be a hesitancy on the part of DHR's in responding to questions about differences they see in hiring older and younger workers. This caution was based upon concerns these professionals have with the possible transgression of EEOC regulations and related legal matters.
- (3) Intrinsic work values seemed to outweigh extrinsic qualities in the mind of hiring officials. This correlates with our earlier Andrus Foundation funded study, "Predictors of Success Among Older Workers in New Jobs," in which



older workers themselves reported holding strong intrinsic values and motivations toward work.

- (4) Qualities deemed important appeared to vary by type of industry, according to patterns discussed from open-ended responses. While this section has been limited to reporting general descriptive data for the whole DHR sample concerning motivations to recruit and hire older workers, the next section will discuss motivations by specific company characteristics.

**RESEARCH QUESTION #2: *Do employers have different motivations depending upon the specific characteristics of the company or business?***

Our second research question was designed to ascertain if motivations to hire older workers differed according to company characteristics (type of industry, size of the organization, availability of alternative work structures) and the personal characteristics of the Director of Human Resources (age, gender, years of experience). We believe this to be important because "the workplace" clearly is not a uniform location but represents myriad conditions, cultures, and other characteristics which may be important to appreciate in the quest to understand reasons for recruiting and hiring older workers.

As with research question #1, we used data from our DHR interviews to answer this research question. The dependent variables for these analyses were (1) the 13 individual response items to the stem, "How important is it to your company at the time you are considering hiring them that older workers are . . . " and (2) factor scores derived from these individual variables.

**Company Characteristic: Type of Industry**

In order to examine type of industry as an independent variable, we first classified the organizations involved in this study by their Standard Industrial Classification (SIC) code. Then the research team grouped these SIC codes into broader categories in order to provide appropriately sized cells for data analysis. Table 6 describes the six categories of businesses with their absolute and relative frequencies.

A series of cross tabulations was conducted with each DHR motivation-to-hire recorded into three categories ("very important," "somewhat important," "not very important") to maximize cell sizes. Appendix A contains results of these analyses. Based upon statistically significant results at the .05 level or lower, only two major findings are especially noteworthy.

Manufacturing and retail/wholesale/service organizations were more likely than other company types to seek an older worker who exhibited an aggressive or competitive spirit.

TABLE 6

STANDARD INDUSTRIAL CODE GROUPINGS OF BUSINESSES  
AND ORGANIZATIONS HIRING OLDER WORKERS  
(N = 105)

Type	Number	Percentage
Health/Social Service	25	23.8%
Retail/Wholesale/Service	20	19.1%
Business/Financial	19	18.1%
Manufacturing	18	17.1%
Public Administration/Utility	12	11.4%
Education	11	10.5%
TOTALS	105	100%

The least likely to seek this employee characteristic were health/social service and educational organizations. Manufacturing companies were clearly the most interested in older workers who were seeking a permanent placement in their new jobs, with 72% reporting that this was "very important". Health/service and educational organizations were least likely to consider this quality important, as Appendix A indicates.

These findings suggest that for the vast majority of qualities older workers have which may motivate employers to hire them, they are equally important regardless of the type of industry in which the job is located.

Although relationships between other worker qualities and type of industry were not statistically significant, some of the trends appearing in this sample may be discovered in larger studies.

It makes sense intuitively that the educational organizations hiring older workers were most interested in the characteristic "willing to learn new things." Nine of the eleven education DHR's (81.8 %) felt this characteristic to be "very important" when hiring an older worker. Public administration and retail/wholesale/service followed with 75 % of the DHR's saying this trait was "very important." The types of industry least likely to value older workers "willingness to learn new things" were manufacturing (55.6 %) and business/financial (57.9 %). However, business/financial companies rated the "ability to make independent decisions" higher than any other type of organization. For example, sixty one percent of business/financial DHR's rated this trait as "very important" compared with only 21 % of retail/wholesale/service and 36.4 % of public administration/utility DHR's.

Several worker characteristics involved flexibility. In terms of the employee being willing to work flexible hours, manufacturing (75 %) and retail/wholesale/service (73.7 %) rated these as most important. Only 43.5 % of health/social service organizations and 37.5 % of public administration/utility companies rated this characteristic as very important. Regarding flexibility in doing a variety of tasks in their work, education (90.1 %) and health/social service (88 %) jobs deemed this to be a very important characteristic. After analyzing these individual DHR motivations to hire, we moved to factor scores. The four factors derived from these 13 DHR motivations (see Table 4) were used as dependent variables in an analysis of variance. Type of industry was the independent variable. Two ANOVA's proved to be statistically significant at or below the .05 level and are reported in Tables 7 and 8.

The Extrinsic Part-Time factor was most important for DHR's in the retail/wholesale/service industry, as Table 7 indicates. The motivations-to-hire which constitute this factor are: willingness of the worker to work flexible hours; interest in supplementing income; and use of skills from previous jobs. This factor was least important for DHR's representing the public administration and utility industry.

The Intrinsic Personal Characteristics factor was most important for DHR's in educational organizations. This factor is made up of two individual worker characteristics: the ability to make independent decisions and creative problem solving. This factor was least

**TABLE 7**

**ANALYSIS OF VARIANCE: EXTRINSIC PART-TIME FACTOR  
BY TYPE OF INDUSTRY**

Industry	Mean	S.D.
Retail/Wholesale/Service	-.626	0.887
Health/Social Services	-.026	0.824
Business/Financial	-.062	1.008
Education	.167	0.830
Manufacturing	.281	1.069
Public Administration/Utility	.694	1.090
Mean Square -	2.981	
F Value -	3.32	
Probability ..	.008	

TABLE 8

ANALYSIS OF VARIANCE: INTRINSIC PERSONAL CHARACTERISTICS FACTOR BY TYPE OF INDUSTRY

Industry	Mean	S.D.
Education	-.527	0.759
Health/Social Services	-.257	0.788
Manufacturing	-.027	0.829
Business/Financial	-.095	1.259
Public Administration/Utility	.352	0.960
Retail/Wholesale/Service	.505	1.060
Mean Square	- 2.213	
F Value	- 2.36	
Probability	- .045	

important for DHR's in retail/wholesale/service. Taken together, these findings suggest that manufacturing companies want older workers who are aggressive and willing to move into a permanent full-time job. Human service and educational employers were more motivated to hire older workers who are non-competitive and have strong intrinsic qualities. Retail, wholesale and other service employers appeared to like older workers seeking part-time jobs that require a competitive personality.

**Company Characteristic: Size**

Next we analyzed the individual worker characteristics by the size of the company. Companies were grouped into four classifications, i.e., small (less than 25 employees), moderately small (25 - 99), moderately large (100 - 499), and large (500 or more). Table 9 shows the absolute and relative frequencies of companies in each size category.

As with the type of industry variable, we ran a series of cross tabulations to examine the relationship between the importance of each older worker characteristic by company size. The smallest companies were most likely to hire older workers who are capable of making independent decisions. Nearly two-thirds (65.2 %) of the DHR's in companies with fewer than 25 employees rated this characteristic as very important, compared with only 22.7% of the DHR's in the largest companies.

TABLE 9

SIZE OF COMPANY IN RESEARCH SAMPLE  
BY NUMBER OF EMPLOYEES  
(N = 105)

Size	Number	Percentage
Small (less than 25)	23	21.7
Moderately Small (25-99)	23	21.7
Moderately Large (100-499)	37	34.9
Large (500 or more)	22	21.7

There was a positive linear relationship between company size and the motivation by DHRs to hire older employees who will work flexible hours. Based on the "very important" response category, more than two thirds of the smallest organizations (68.2 %) and only 40% of the largest companies were motivated to hire by this employee quality. While they may have been less interested in flexible hours, the largest organizations appeared to want older workers to use skills they had developed from previous jobs. Three quarters of the DHR's in companies with 500 or more workers rated this characteristic to be very important, a full twenty percentage points above any of the other company sizes.

DHR's from larger-sized organizations also were more motivated to hire older workers who are willing to adapt to new technologies in the workplace. One might expect this pattern since it is likely that larger companies have invested significant resources in computers and other advanced technologies. Seventy percent of the DHR's representing organizations with 500 or more workers believed this trait to be very important among newly hired older workers, whereas 64.9 % of the DHR's from moderately large companies did so. The moderately small companies were the least likely to rank this trait highly (40.9 %).

The smallest organizations were the most likely, however, to value the ability of older workers to solve problems on the job. Sixty-seven percent of these DHR's rated this trait "very important." The next highest ranking was 48.8 % by the 100 - 499 worker companies. Largest companies were least likely to consider hiring an older worker for this specific characteristic: the largest company, at 31.6 %, rated it as very important.

It is equally important to note that for several worker characteristic items there were virtually no differences by size of company. For example, when asked about the importance of older workers seeking certain extrinsic job benefits such as fringe benefits, promotion and advancement, and medical insurance, the scores were almost exactly the same across all

company sizes (about 65 % saying this was "not very important" to them when considering a hiring decision). This is interesting in light of studies that report anxiety on the part of organizations in hiring older workers because of a concern for higher insurance and related costs (AARP - Yankelovich, 1989; Doeringer, 1990; Hale, 1990).

There was similar parity across organizational size on several intrinsically oriented worker qualities. For example, about 75 % of DHRs from all groups of company size expressed the belief that it was very important for the worker to perform flexible tasks.

As with type of industry, after analyzing the individual DHR motivations, we moved to factor scores. Once again, the four factors derived from these motivations (see Table 4) were used as dependent variables, and company size was the independent variable. One ANOVA proved to be significant at the .05 level and is shown in Table 10.

The smaller companies apparently had the most interest in hiring older workers who are deemed by DHR's to possess intrinsic personal characteristics. Consequently, being able to make independent decisions and solving problems creatively were particularly salient skills in the eyes of managers hiring for smaller-sized organizations. This factor score finding confirmed the trend noted earlier (individual item analysis) concerning the preference among smaller organizations to hire older workers who can solve problems on the job.

TABLE 10

ANALYSIS OF VARIANCE: INTRINSIC PERSONAL CHARACTERISTIC  
FACTOR BY COMPANY SIZE

Company Size	Mean	S.D.
Small (less than 25)	-.433	0.873
Moderately Small	.010	1.015
Moderately Large	.035	1.045
Large	.385	0.920
Mean Square - 2.540		
F Value - 2.66		
Probability - .05		

Company Characteristic: Work Structures

A final company characteristic we examined was the existing work structures available to employees. First, we used part-time vs. full-time work as an independent

variable, with worker characteristic factor scores as dependent variables. We defined part-time as less than 30 hours, full-time as 30 hours or more per week and grouped respondents according to which category contained the most newly hired older workers. T-tests revealed that DHR's who tend to hire full-time older workers were motivated by the "Intrinsic/Fit" factor (significant at the .06 level). DHR's who hired mostly part-time workers were motivated by "Extrinsic/Part-time" characteristics (significant at the .002 level).

Next we examined to what extent organizations offered so-called "alternative work structures." Studies have suggested that organizations that provide options such as job sharing, flex-time, job redesign and other alternatives to traditional workplace structures are more successful in recruiting, hiring, and retaining older employees (Fyock, 1990; Hale, 1990). Table 11 reports the frequency and rank ordering of six alternative work structures offered by organizations in this study.

Our first level of analysis was to examine the availability of these alternative structures by company size. Cross-tabulations revealed that the largest organizations (500 employees or more) were most likely to provide a variety of alternative structures to its employees (that is, to all their employees). For example, 65.2% of these larger companies offered "flex-time" to its workers whereas about half the other sized organizations did so.

**TABLE 11**

**RANK ORDER OF ALTERNATIVE WORK STRUCTURES  
OFFERED BY ORGANIZATIONS HIRING OLDER WORKERS**

Alternative Work Structure	Percentage of Organizations Offering This Option
1. Job Redesign	61.0%
2. Flex-time	55.2
3. Reduced Work Week	45.7
4. Job Sharing	37.5
5. Flex-place	24.8
6. Phased in Retirement	23.1

Just over 65% of the larger companies offered a reduced work week, although this option was available to between 22 - 50% of the smaller-sized companies. Similarly, the largest organizations made phased retirement, job redesign, and job sharing more available to all their workers. The only alternative job structure made more available to workers in smaller



companies was flex-place: 34 % of organizations with 25 - 99 employees offered this option compared with 21 - 24 % for the other sized organizations.

Cross-tabulations were conducted to examine the relationship between DHR motivations to hire and these various alternative job structures. No substantial findings resulted from this examination.

T-tests run on DHR motivation-to-hire factor scores by work structures yielded significant differences on three tests. These are reported in Table 12.

**TABLE 12**

**SELECTED T-TESTS ON ALTERNATIVE WORK STRUCTURES  
BY DHR MOTIVATION-TO-HIRE FACTORS\***

Extrinsic Part-Time

Work Structure	Mean	S.D.	Probability
Yes-Job Redesign	0.178	0.912	
No-Job Redesign	-0.236	1.081	.034

Intrinsic Personal Characteristics

Work Structure	Mean	S.D.	Probability
Yes-Job Redesign	-0.183	0.925	
No-Job Redesign	0.230	1.091	.036

Extrinsic Full-Time

Work Structure	Mean	S.D.	Probability
Yes-Flextime	0.304	0.889	
No-Flextime	-0.250	1.078	.003

\*Lower mean score signifies higher ranking on the DHR motivation-to-hire scale.

DHR's in organizations that offered job redesign options were more likely to prefer older workers with intrinsic personal characteristics (i.e., making independent decisions and being able to solve problems creatively). Those without job redesign options preferred people with extrinsic part-time qualities (i.e., being willing to work flexible hours, working to supplement income, using skills from previous jobs). And finally, those organizations with no flextime, an alternative structure that allows the worker to choose which hours or days she/he works preferred to hire people with extrinsic full-time qualities (i.e., seeking fringe benefits and medical insurance).

#### **DHR Characteristic: Gender**

In the next analysis, we ran cross tabulations on motivations-to-hire by the gender of the DHR. While no differences were statistically significant, women seemed to prefer hiring older workers who: made independent decisions (49.2 % "very important", compared with 35.7 % for men); were flexible in the tasks they would perform (81 % vs. 69 %); were capable of problem solving (54.7 % vs. 36.6 %); and could adapt to new technologies (61.2 % vs. 53.7 %). It is worth noting that these are all intrinsically oriented characteristics. The two variables worker qualities to which male DHR's attached greater importance than female DHR's were both extrinsically oriented. The first quality, supplementing income, was rated very important by 45.5 of the male DHR's, compared with 29% of the females. In fact, 71% of women DHR's reported that this was "not very important" in their decision to hire. The second quality, seeking medical insurance, was ranked very important by 36.3% of the males, compared with 31% of the female DHR's.

These gender based trends were confirmed by running T-Tests on the gender differences among the four worker characteristic factors, i.e., "Extrinsic/Full-time," "Extrinsic/Part-time," "Intrinsic/Personal Characteristics," and "Intrinsic/Fit." Although none of these tests were significant at the .05 level, women DHR's reported higher scores than their men counterparts on both intrinsic factors. Scores were almost exactly the same for "Extrinsic/Full-time", although men reported higher scores than women on "Extrinsic/Part-time."

#### **DHR Characteristic: Age**

Next we examined the relationship between these worker characteristics and the age of the DHR. A significant difference existed on the "willing to learn new things" variable, with the youngest DHR's (age 26 - 39) valuing this trait more than the 40 - 49 or 50 years and over groups (chi square - .04). The youngest and middle-aged DHR's valued problem solving more than the older ones (52.9 % and 54.6 % for the 26 - 39 and 40 - 49 groups as compared with 29.6 % for the 50 and over group on the "very important" response). Those in the youngest DHR category reported valuing both an aggressive/competitive spirit on the part of the older worker and their seeking promotion and advancement. Perhaps this reflects an advancement philosophy that they hold for themselves in their still early careers.

## DHR Characteristic: Years of Experience

DHR's with five or more years in their position (the highest category) were more likely than DHR's with shorter tenure to rank several motivations-to-hire as "very important". Statistically significant patterns were observed between years of DHR experience and several intrinsic qualities (learn new things, problem solving, and make independent decisions). One conclusion that may be derived from this is that the more experienced human resources director tends to have greater expectations of older new hires, particularly in the area of intrinsically oriented worker characteristics.

### Summary of Research Question 2

The following are summary points of the major findings from Research Question #2:

#### (1) Company Characteristics

While employers did not appear to demonstrate enormously different motivations in their hiring practices across company types and sizes, shades of differences are evident:

- (a) Some differences appeared by type of industry. Manufacturing organizations sought older workers who show a competitive/aggressive spirit and who are looking for permanent placements in their new jobs. Manufacturing also appeared to value the willingness to work flexible hours. Education and health/social service organizations wanted people who were willing to be flexible in the tasks they perform. The "Extrinsic Part-Time" factor (flexibility in hours worked, supplement income, use skills from previous jobs) was most important for retail/wholesale/service types of jobs while the "Intrinsic Personal Characteristics" factor (i.e., make independent decisions, creative problem solving) was more important for educational organizations.
- (b) Size of company yielded variations. Small companies sought older workers who could make independent decisions, work flexible hours, and solve problems on the job. Larger organizations hired people who are willing to adapt to new technologies.
- (c) Work structures also yielded differences. DHR's who hired full-time workers were interested in "Intrinsic Fit" attributes (i.e., willingness to learn new things and adapting to new technologies) while those hiring part-time workers placed value on "Extrinsic Part-Time" attributes. Regarding alternative work structures, numerous shades of differences presented themselves in these data. Those organizations that offered the most prevalent alternative work structure in our sample, job

redesign, preferred to hire people with "Intrinsic Personal Characteristics."

(2) Personal characteristics of DHRs

Personal characteristics of DHRs in our sample tended to influence the importance they attached to older worker qualities in hiring decisions.

- (a) Women who hired older workers were more motivated than their male counterparts by intrinsic factors such as older workers' ability to make independent decisions, flexibility in task performed, and creative problem solving.
- (b) Younger DHRs placed more value on aggressive/competitive spirit in older applicants, problem solving ability, and willingness to learn new things.
- (c) DHRs with longer job experience were more likely to be motivated to hire older applicants who showed strong intrinsic qualities.

**RESEARCH QUESTION #3: *How satisfied are supervisors with recently hired older workers in their companies?***

To answer this research question, a direct supervisor of an older worker from each of the participating organizations was interviewed by telephone. At the end of the DHR interview, we asked each director to provide us with a name and telephone number of one individual in their organization who was directly supervising a newly hired older worker. When we contacted this person, we asked him/her if they were presently supervising an older worker hired since January of 1988 or had supervised one in the past six months. Once the supervisor passed this screening questions, he/she was asked to provide us with up to three first names of recently hired older workers they were presently or had previously supervised. If more than one name was provided, our interviewers selected one by way of a table of random numbers. This older worker then became the reference point for the entire interview with the supervisor.

The interview questions designed to answer this third research question were:

- \* How do you rate your newly hired older worker on a series of specific worker characteristics?

- \* What differences, if any, are there between older and younger worker characteristics?
- \* How satisfied are you with your newly hired older worker on selected job performance criteria?
- \* Why are you satisfied/dissatisfied with the older worker's job performance?

We began the supervisor interview by asking each supervisor to rank on a four-point scale a series of eight worker characteristics on a four point scale. We asked the supervisor, "Thinking about (name of older worker), please tell me if you strongly agree, agree, disagree, or strongly disagree with the following statements about (name)." As with the series of fixed-response items in the DHR interview, the Computer Assisted Telephone Interview program randomized the start of these items in order to minimize response set bias. Table 13 reports the rank ordering of these supervisor rankings of older worker characteristics.

**TABLE 13**

**RANK ORDERING OF OLDER WORKER CHARACTERISTICS  
AS REPORTED BY THEIR SUPERVISOR  
(n = 113)\***

<b>Characteristic</b>	<b>Mean</b>	<b>S.D.</b>
1. Loyal and dedicated to organization	1.49	.569
2. Gets along well with co-workers	1.50	.537
3. Good attitude towards job	1.51	.584
4. Committed to the job	1.54	.613
5. Physical stamina or energy level needed to function well	1.74	.678
6. Willing to learn new procedures and technologies	1.83	.683
7. Creative in solving problems	1.97	.687
8. Shows an aggressive or competitive spirit	1.98	.687

\* Means computed by assigning values: 1 = strongly agree; 2 = agree; 3 = disagree; 4 = strongly disagree

Our experience here was similar to the various DHR ratings; there was not a lot of variation in the supervisors' responses to these items. For example, 54 % of the supervisors "strongly agreed" and another 42.5 % "agreed" with the statement that the older worker "is loyal and dedicated to the organization." This left a total of five people (4.4 %) who disagreed with this statement. Similar uniformity of responses occurred with the second highest rated item, getting along well with co-workers. Fifty-eight supervisors (51.3 %) reported they strongly agreed with this attribute, 53 (46.9 %) agreed, and only two (1.8 %) disagreed.

Greater variation in responses did occur among worker characteristics toward the bottom of the ranked list. Table 14 shows the frequencies of supervisor responses to these three items.

We shall say more about learning new procedures and technologies, problem solving abilities, and aggressive/competitive spirit in theme analysis of open-ended questions later in the section of this report.

We then asked the supervisors if they saw any differences between the characteristics that the older worker brought to the job and those brought by younger workers. Ninety-four supervisors (84.7%) responded "yes" to this question. We followed by asking these 94 supervisors to talk about those characteristics that were different.

Many respondents reported characteristics reminiscent of those discussed by Directors of Human Resources in Question #1. Attributes such as reliability, flexibility in accepting tasks, general work experience, and high motivation were regularly reported as characteristics that set older workers apart from younger ones. Several additional characteristics emerged, however.

Supervisors reported that older workers were more attentive and conscientious than younger workers under their direct supervision. "The older worker pays more attention," reported a supervisor in a shoe factory. Another, who worked with accounting functions, said that her elder supervisee was "more conscientious and detail oriented." Others spoke of the older worker as having more discipline, being highly focused on task, and, in the words of a direct supervisor in an electronic assembly plant, being a worker who "uses more concentration and is more quality oriented."

Supervisors also frequently commented on the lower absenteeism rates of their elder employees. "There is less absenteeism due to daycare," reported one. "An older worker is more dedicated and has better attendance," reported another. And a supervisor in a wholesale business said this: "Basically there is more dedication to the job. There is a greater attendance record. Younger workers take sick and personal days off if they have them available."



A third theme distinguishing older from younger workers as reported by direct supervisors was the passion and enjoyment of work. "She is a little more passionate," said a healthcare supervisor. "She is more experienced and more enthusiastic," reported a food industry employee.

**TABLE 14**  
**FREQUENCY OF RESPONSES BY SUPERVISORS TO**  
**THREE LOWEST RANKED WORKER CHARACTERISTICS**

*Item: "Willing to learn new procedures and technologies"*

Response	Frequency	Percent
Strongly Agree	34	30.4
Agree	66	58.9
Disagree	9	8.0
Strongly Disagree	3	2.7
TOTAL	112	100.0

*Item: "Creative in solving problems on the job"*

Response	Frequency	Percent
Strongly Agree	25	22.1
Agree	69	61.1
Disagree	16	14.1
Strongly Disagree	3	2.7
TOTAL	113	100.0

*Item: "Shows an aggressive or competitive spirit in his/her work"*

Response	Frequency	Percent
Strongly Agree	24	21.6
Agree	68	61.3
Disagree	16	14.4
Strongly Disagree	3	2.7
TOTAL	111	100.0

Additional evidence from the interview supported this theme of passion and enthusiasm for work even more strongly. Representative comments were as follows: "She enjoys her work"; "Work is an important part of her life . . . she likes to take responsibility and to be independent"; "She's always happy at work"; "He's an eager, happy, strong worker"; (she) "is enthusiastic, enjoys completing projects, gets satisfaction out of the program because of her successes . . . I would hire 100 if I could."

What is worthy of comment here is that these particular worker attributes, i.e., attentiveness/conscientiousness, lower absenteeism, and passion for work, would be highly noticeable and of great import to a direct supervisor, compared with someone higher up in the organization who may not have day-to-day personal contact with employees (i.e., a Director of Human Resources). Although an employee virtue such as regular attendance on the job would be noticed through staffing reports, other personnel data, and documentation which DHR's would see and know (and many would probably author), the daily impact of a worker's attendance would be felt more by the direct supervisor. We believe it is consequential that this characteristic is raised so clearly here. Similarly, the enthusiasm an employee brings to the job and his/her attentiveness to quality, although having obvious organizational implications, are experienced by and have an important impact in the daily lives of supervisors. Therefore, the perspective of the supervisor is different from the DHR, and the attributes he/she sees or doesn't see in their workers shed a variation of light on the question of worker value and effectiveness.

We followed this open-end question with a series of fixed item questions designed to ascertain supervisors' level of satisfaction on eight job performance traits. Supervisors were once again asked to think of the specific older worker we had targeted for evaluation and rank job performance items on the following four-point scale: "very satisfied," "satisfied," "somewhat dissatisfied," or "very dissatisfied." Table 15 reports the rank ordering of these job performance traits.

Attendance record, a matter upon which supervisors commented with relish in the open-ended question asking them to compare older and younger workers, was ranked first. Out of 113 supervisors, only three (2.7 %) responded that they were "somewhat dissatisfied" with the attendance record of their older employee. Items 2 - 6 in Table 14 were very close in the rankings with almost the same mean score on the four-point satisfaction scale. Although ratings were still positive on the eighth ranked item, "willingness to perform additional tasks not in the job description," seven supervisors (6.4% reported that they were "somewhat dissatisfied" with their older worker, and three (2.7%) said they were "very dissatisfied."

**TABLE 15**

**RANK ORDERING OF SATISFACTION WITH OLDER WORKER JOB PERFORMANCE AS REPORTED BY THEIR SUPERVISOR**  
(N = 113)\*

Performance Characteristic	Mean	S.D.
1. Attendance record	1.20	.466
2. Way he/she follows instructions	1.42	.652
3. Meeting deadlines	1.43	.639
4. Amount of supervision workers needs to get job done	1.44	.626
5. Ability to count on in a crisis	1.44	.667
6. Willingness to work overtime	1.45	.737
7. Skills in communicating on the job	1.54	.535
8. Willingness to perform additional tasks not in job description	1.57	.735

\* Means computed by assigning values: 1 = very satisfied; 2 = somewhat satisfied; 3 = somewhat dissatisfied; 4 = very dissatisfied.

This multi-item question was followed by a single, overall satisfaction item which read as follows: "Overall, how satisfied are you with \_\_\_\_\_'s performance in this job?" The same satisfaction scale that was used in the previous question was employed here. The results of this question are reported in Table 16:

**TABLE 16**

**OVERALL SATISFACTION OF OLDER WORKER AS ASSESSED BY DIRECT SUPERVISOR**

Response	Frequency	Percent
Very Satisfied	75	67
Somewhat Satisfied	33	29.4
Somewhat Dissatisfied	2	1.8
Very Dissatisfied	2	1.8
TOTAL	112	100.0

It is clear that the general evaluation of the newly hired older worker's performance by his/her direct supervisor is overwhelmingly positive. Once again, it is important to note that the person making this rating was the one who works hour-to-hour, day-to-day with the older worker and whose own work life would be significantly affected by both good and poor worker performance.

We were interested in following up this overall evaluation question by asking the supervisor why he/she was satisfied or dissatisfied with this particular older employee. As one might expect, numerous comments were made about the reliability, maturity, experience, and other frequently listed (in this study and elsewhere) characteristics of older workers.

By far, however, the most commonly reported reason for satisfaction was that the new elder employee was, to put it clearly and simply, "a good worker." The supervisor of a cook said, "He knows his job description and goes about carrying it out very well." The supervisor of a factory inspector commented, "She does an excellent job and is a hard worker. I can't say enough good things about her." Other comments were: "He's a perfect fit for the job. He does it well and has a very positive attitude - a "can do attitude"; "She's a very talented seamstress, willing to do whatever is asked of her, and very reliable"; "She does all the things that she is asked to do in at least a satisfactory way if not better. She's made every effort to be steady and can be counted on"; and "Her overall attitude is really good. She's a very hard worker and is willing to do extra."

While there were far fewer comments explicating reasons for dissatisfaction, some did occur. Most appeared to relate to minor memory losses (or at least the perception of such losses by the supervisor), lack of aggressiveness, or other characteristics which relate to the mental capacity or disposition of the older worker. Examples of these comments were: "He's not able to respond to direction"; "If she doesn't want to do something, she says she forgot and she doesn't do it"; "She tends to forget and get confused about certain paperwork"; "Sometimes he may have problems understanding instructions and does not let you know"; "She is not aggressive enough"; and "is not accepting of new procedures."

It is interesting to note that none of the responses to this open-ended follow-up question about satisfaction/dissatisfaction with the older worker mentioned physical incapacity. One might theorize that physical problems might be more easily assessed at the time of hiring - by observing the elder applicant, or by asking about his/her health history, energy level, ability to bend, lift, or perform whatever physical movements are required on the job. However, it is also more difficult to observe as well as assess in other ways (without the benefit of formal instruments), those problems associated with memory or other mental functions (i.e., dispositional attributes) that tend to characterize the problems mentioned by dissatisfied supervisors in this sample.

Finally, some supervisors responded to this follow-up question with what might be construed as a mixed message. Although they appeared to be generally positive and

affirming of their newly hired older worker, they also incorporated a problem or area of concern into their comment. The following are examples of this blended response:

- \* "She has problems with remembering details, but as far as being loyal and willing to work and trying her best, she's great. That sort of outweighs the problems."
- \* "They're all good workers as long as you're there to see that they're doing their jobs."
- \* "George is very willing to do things. He often has his own way of doing things. And when you want him to do something your way, he usually needs a lot of information as to why."
- \* "She does mostly everything we ask of her. She's only there three hours a day, so because of this it is tough to be outstanding."

### Summary of Research Question 3

Four summative points are merited at this time in our attempt to answer the question, "How satisfied are supervisors with recently hired older workers?"

- (1) Most supervisors, those individuals in organizations who have the closest managerial relationship with employees, had overwhelmingly positive feelings about their newly hired older workers. They rated very highly the older worker's loyalty and dedication to the organization, their ability to get along with co-workers, their attitude toward work, and other important job characteristics.
- (2) Unlike DHR's, who often went out of their way to suggest that older and younger workers were actually similar, supervisors saw a distinction. Three distinguishing points were raised when comparing older and younger workers. They saw older employees as being more attentive to detail, having fewer absences from work, and displaying greater passion and enthusiasm toward work. Each of these attributes influence the day-to-day local culture of the workplace, and direct supervisors are often in a position to be personally affected by them. It is perhaps salient that these observations were raised by supervisors who have this "up close and personal" perspective rather than by DHR's who, in many cases, do not have this perspective and who also appear to be cautioned by their knowledge of E.E.O.C., Age Discrimination in Employment Act, and other statutory regulations.

- (3) Supervisors reported that they were very satisfied, for the most part, with the job performance of newly hired older workers. The performance characteristic with which they were most satisfied was the older worker's attendance record; that with which they were least satisfied was the older worker's willingness to perform additional tasks not in the job description.
- (4) The reasons for some supervisors being dissatisfied with older workers seemed to group around memory deficit, lack of aggressiveness, and other characteristics which related to mental capacity or disposition.

**RESEARCH QUESTION #4: *How do supervisors' experiences with older workers vary depending upon (1) characteristics of the older employee (2) characteristics of the supervisor (3) characteristics of the job (4) characteristics of the company or business?***

The fourth and final research question examined relationships between supervisors' experiences with newly hired older workers and a wide variety of other variables (see Figure 1, p. 19). Throughout all of these analyses there were two dependent variables: (1) worker characteristics ranked by supervisors on a four-point scale (see Table 13) and satisfaction with job performance items ranked on a four-point scale (see Table 15). We have organized this section into four parts, each responding to one of the sub-sections of this research question.

1. Older Worker Characteristics

- (a.) Age

The older workers examined through the eyes of their immediate supervisors in this sample ranged in age from 50 to 88 years. The mean age was 60.3 (standard deviation = 6.93). In order to analyze relationships to answer this research question, we constructed four age categories: 50 - 54 (N = 18); 55 - 59 (N = 41); 60 - 64 (N = 23); 65 and over (N = 31) for a total older worker sample size of 113.

Table 17 highlights the "strongly agreed" response to each of the eight older worker characteristics items by age category as reported by direct supervisors.

The youngest age group, workers 50 - 54, received more "strongly agreed" responses on every item except "Willing to Learn New Procedures and Technologies" and "Shows an Aggressive or Competitive Spirit." From these data it appears that supervisors more highly valued the worker characteristics as manifested by the youngest older workers, although it must be noted that nowhere was there strong disagreement or avowal of the absence of these worker traits in any of the age cohorts.



TABLE 17

PERCENT OF SUPERVISORS REPORTING "STRONGLY AGREE" ABOUT OLDER WORKERS CHARACTERISTICS BY OLDER WORKER AGE GROUPS

Worker Characteristic	Age Group			
	50-54	55-59	60-64	65+
1. Loyal and dedicated to organization	61.1	43.9	56.5	59.4
2. Gets along well with co-workers	61.1	34.2	60.9	59.4
3. Good attitude towards job	77.8	43.9	56.5	46.9
4. Committed to the job	77.8	36.6	60.9	46.9
5. Physical stamina or energy level needed to function well	55.6	24.4	43.5	40.6
6. Willing to learn new procedures and technologies	27.8	22.0	43.5	35.5
7. Creative in solving problems	27.8	22.0	21.7	35.5
8. Shows an aggressive or competitive spirit	22.2	14.6	18.2	32.3

Table 18 reports the percentage of supervisors who were "very satisfied" with job performance traits, again broken down by older worker age category.

With job performance, the youngest group received a greater percentage of "very satisfied" ratings on all but three of the eight items: "Way He/She Follows Instructions," "Meeting Deadlines," and "Skill in Communicating on the Job" (tied with the 65 and over group). Once again, whereas supervisors by no means overwhelmingly preferred the youngest of these older workers, they appeared to be saying that they were slightly more satisfied with the job performance of the 50 - 54 age group than the other age categories of new hires.

(b.) Gender

A majority of the older workers to whom specific references were being made during the supervisor interview were women (57%). While negligible differences in supervisor ratings by older worker gender occurred on numerous workers characteristic and job performance variables, significant differences were found on two. Tables 19 and 20 report chi square analyses for "shows an aggressive or competitive spirit" and "meets deadlines."

**TABLE 18**

**PERCENT OF SUPERVISORS REPORTING "VERY SATISFIED"  
TO JOB PERFORMANCE TRAITS, BY OLDER WORKER AGE GROUPS**

Job Performance Trait	Age Group			
	50-54	55-59	60-64	65+
1. Attendance record	100.0	75.6	82.6	81.3
2. Way he/she follows instructions	61.1	58.5	72.7	71.9
3. Meeting deadlines	72.2	48.8	73.9	65.6
4. Amount of supervision workers need to get job done	72.2	63.4	52.2	56.3
5. Ability to count on in a crisis	72.2	61.0	60.9	59.4
6. Willingness to work overtime	77.8	61.1	73.7	67.7
7. Skill in communicating on the job	50.0	48.8	39.1	50.0
8. Willingness to perform additional tasks not in job description	72.2	41.0	56.5	61.3

**TABLE 19**

**LEVEL OF AGREEMENT ABOUT OLDER WORKER  
AGGRESSIVE/COMPETITIVE SPIRIT BY WORKERS GENDER**

Level of Agreement	Male	Female	Total
Strongly Agree	16.28	24.56	21.00
Agree	74.42	50.88	61.00
Disagree	9.30	24.56	18.00
TOTALS	43	57	100

Chi Square value = 6.20  
p = .045

TABLE 20

LEVEL OF SATISFACTION OF SUPERVISOR WITH OLDER  
WORKER ABILITY TO MEET DEADLINES BY WORKER GENDER

Level of Satisfaction	Male	Female	Total
Very Satisfied	50.00	72.41	62.75
Satisfied	45.45	22.41	32.35
Dissatisfied/Very Dissatisfied	4.55	5.17	4.90
TOTALS	44	58	102

Chi Square value = 6.13  
p = .047

While more supervisors of older women "strongly agreed" that their workers showed an aggressive or competitive spirit than supervisors of older men (24.6% vs. 16.3%), a far greater difference, this time to the advantage of men, occurred in the "disagree" response. Almost one quarter of the supervisors of newly hired females believed this workers quality to be absent.

Women workers, however, were seen to be better than their male counterparts at meeting deadlines. Nearly three-quarters (72.4%) of the supervisors of women reported being "very satisfied" with this job performance variable as compared with 50% of the supervisors of men.

While the differences were not statistically significant, supervisors of women rated their workers slightly better on adapting to new technologies, commitment to the job, having a good attitude, getting along with co-workers, and dedication to the organization. Supervisors of men rated their workers slightly better on creative problem solving and attendance record.

(c.) Educational Level of Older Worker

During the supervisor interview, we asked about the educational level of the specific older worker to whom we were making reference throughout the interview. Ten supervisors were unable to provide this information, so the total sample size for this analysis is 103. We organized older workers' educational levels into the following four categories: "Less than

High School (N = 9);" "High School/GED (N = 57);" "Vocational 1/1 - 3 Years of College (N = 20);" "College Graduate (N = 17)." Cross tabulations were then run on older worker characteristics by educational level. Table 21 displays the percentages of supervisors who reported they "disagreed" that their newly hired older workers possessed various worker characteristics by educational level.

With the exception of the "Physical Stamina/Energy" item, no direct supervisor disagreed that older workers with at least a four-year college education possessed characteristics. While disagreement levels were low for other educational levels on many items, there is a clear relationship between college education and manifesting these desirable worker traits.

Cross tabulations were also run on the job performance satisfaction variables by educational level. Evidence for the favorable view of college-educated older workers was not as clear in this analysis. Therefore, higher education among older workers appeared to be more highly valued for personal qualities than for its influence on actual job performance.

#### (d.) Health Status

Direct supervisors were asked to report the general health status of their newly hired older worker as either "Excellent," "Good," "Fair," or "Poor." Since very few reported "poor," we combined the fair and poor categories. The distribution of older workers' health status in this sample was: "Excellent" (N = 31); "Good" (N = 64); "Fair/Poor" (N = 18).

Findings revealed that older workers in fair or poor health were not viewed as positively by their supervisors. To illustrate this point we have prepared four cross tabulation tables, 22-25, two each for older worker characteristics and job performance satisfaction. Relationships in these four tables were significant at the .05 level or below. Although it may appear intuitive that those with fair or poor health might rate lower on items such as stamina or willingness to perform additional tasks, it is less self-evident that supervisors would rate these workers lower on worker characteristics, such as creative problem solving and commitment to the job or job performance items, such as amount of supervision required and the ability to be counted on in a crisis. But these data suggest that supervisors do, in fact, feel this way.

#### (e.) Health Limitations

A separate question was asked in which supervisors responded yes/no to whether the older worker had "a health or physical problem which limits the kind or amount of work he/she can do." Ninety (79 %) responded "no" to this question.

TABLE 21

PERCENT OF SUPERVISORS REPORTING DISAGREEMENT TO OLDER WORKERS CHARACTERISTIC BY OLDER WORKER LEVEL OF EDUCATION\*

Worker Characteristic	Level of Education			
	Less Than High School	High School/ G.E.D.	Voc/1-3 Years College	College Graduate
1. Loyal and dedicated to organization	0.0	3.5	5.0	0.0
2. Gets along well with co-workers	0.0	1.75	5.0	0.0
3. Good attitude toward job	0.0	7.0	5.0	0.0
4. Committed to the job	0.0	7.0	5.0	0.0
5. Physical stamina or energy level needed to function well	22.2	8.8	10.0	5.9
6. Willing to learn new procedures and technologies	22.2	10.5	20.0	0.0
7. Creative in solving problems	22.2	21.5	15.0	0.0
8. Shows an aggressive/competitive spirit	0.0	19.3	31.6	0.0

\* Disagree and Strongly Disagree categories combined into a single "Disagree" category.

The cross tabulations of the two major dependent variables (i.e., older worker characteristics and satisfaction with job performance) yielded even greater differences from those which resulted from the health status variable. Tables 26, 27, 28, and 29 illustrate these differences on two older workers characteristics (i.e., learn new procedures and technologies; committed to the job) and two job performance criteria (i.e., willing to perform additional tasks; able to count on worker in a crisis).

TABLE 22

SATISFACTION OF SUPERVISOR WITH AMOUNT  
OF OLDER WORKER SUPERVISION REQUIRED, BY  
OLDER WORKER HEALTH STATUS, BY PERCENT

Level of Satisfaction	Health Status			
	Excellent	Good	Fair/Poor	Total
Very Satisfied	81.25	57.81	33.33	60.53
Satisfied	18.75	39.06	55.56	35.96
Dissatisfied/Very Dissatisfied	0.00	3.13	11.11	3.51
TOTALS	31	64	18	113

Chi Square value = 13.4  
p = .01

TABLE 23

SATISFACTION OF SUPERVISOR WITH ABILITY TO COUNT ON OLDER  
WORKER IN A CRISIS, BY OLDER WORKER HEALTH STATUS

Level of Satisfaction	Health Status			
	Excellent	Good	Fair/Poor	Total
Very Satisfied	71.88	62.50	44.44	62.28
Satisfied	28.13	34.38	38.89	33.33
Dissatisfied/Very Dissatisfied	0.00	3.13	16.67	4.39
TOTALS	31	64	18	113

Chi Square value = 9.7  
p = .05



**TABLE 24**

**LEVEL OF AGREEMENT ABOUT OLDER WORKER CREATIVE PROBLEM SOLVING ABILITY, BY OLDER WORKER HEALTH STATUS**

Level of Agreement	Health Status			
	Excellent	Good	Fair/Poor	Total
Strongly Agree	34.38	17.19	16.67	21.93
Agree	46.88	71.88	50.00	61.40
Disagree	18.75	10.94	33.33	16.67
TOTALS	31	64	15.79	113

Chi Square value = 10.1

p = .04

**TABLE 25**

**SUPERVISOR'S LEVEL OF AGREEMENT ABOUT OLDER WORKERS' COMMITMENT TO THE JOB, BY OLDER WORKER HEALTH STATUS**

Level of Agreement	Health Status			
	Excellent	Good	Fair/Poor	Total
Strongly Agree	62.50	46.88	44.44	50.88
Agree	37.50	51.56	33.33	44.74
Disagree	0.00	1.56	22.22	4.39
TOTAL	31	64	18	113

Chi Square value = 18.4

p = .001

**TABLE 26**

**SUPERVISORS' LEVEL OF AGREEMENT ABOUT OLDER WORKERS' ABILITY TO LEARN NEW PROCEDURES AND TECHNOLOGIES, BY OLDER WORKER HEALTH LIMITATION**

Level of Agreement	Yes	No	Total
Strongly Agree	16.67	34.83	30.97
Agree	50.00	60.67	58.41
Disagree	33.33	4.49	10.62
<b>TOTALS</b>	<b>24</b>	<b>89</b>	<b>113</b>

Chi Square value = 17.2

P = .001

**TABLE 27**

**SUPERVISORS' LEVEL OF AGREEMENT ABOUT OLDER WORKERS' COMMITMENT TO THE JOB, BY OLDER WORKER HEALTH LIMITATION**

Level of Agreement	Yes	No	Total
Strongly Agree	45.83	52.22	50.88
Agree	37.50	46.67	44.74
Disagree	16.67	1.11	4.39
<b>TOTALS</b>	<b>24</b>	<b>89</b>	<b>113</b>

Chi Square value = 10.0

P = .004

**TABLE 28**

**SATISFACTION OF SUPERVISOR WITH OLDER WORKERS' WILLINGNESS TO PERFORM ADDITIONAL TASKS, BY OLDER WORKER HEALTH LIMITATIONS**

<b>Level of Satisfaction</b>	<b>Yes</b>	<b>No</b>	<b>Total</b>
Very Satisfied	20.83	64.37	54.95
Satisfied	58.33	29.89	36.04
Dissatisfied/Very Dissatisfied	20.83	5.75	9.01
<b>TOTALS</b>	<b>24</b>	<b>87</b>	<b>111</b>

Chi Square value = 15.5  
P = .001

**TABLE 29**

**SATISFACTION OF SUPERVISOR WITH ABILITY TO COUNT ON OLDER WORKER IN A CRISIS, BY OLDER WORKER HEALTH LIMITATIONS**

<b>Level of Satisfaction</b>	<b>Yes</b>	<b>No</b>	<b>Total</b>
Very Satisfied	37.50	68.89	62.28
Satisfied	50.0	28.89	33.33
Dissatisfied/Very Dissatisfied	12.50	2.22	4.39
<b>TOTALS</b>	<b>24</b>	<b>89</b>	<b>113</b>

Chi Square Value = 10.1  
p = .006

Supervisors clearly felt that workers with health limitations had fewer desirable attributes and performed less satisfactorily than those without such limitations. On all but

one of the 16 measures (older worker communication skills) supervisors reported higher rating for employees who did not have a health limitation, and the ratings were very close on that single exception (50% vs. 47% "very satisfied" with the older worker's communication skills). From these data it appears that when supervisors believe a subordinate has a health problem or physical limitation, their views of the worker's overall qualities and job performance are affected.

(f.) Wages

Data collected on wage/salary of the newly hired older worker, whether originally provided to us by the supervisor in hourly, weekly, monthly, or annual units, were reduced for the sake of this analysis into units of hourly wage. The average wage earned was \$8.43 per hour. Once again, categories were developed in order to expedite cross tabulations. Table 30 shows the wage distribution as reflected in these categories.

**TABLE 30**  
**DISTRIBUTION OF HOURLY WAGE EARNED**  
**BY OLDER WORKERS IN SAMPLE**

Wage	Frequency	Percent
\$5.50 or less	38	33.3
\$5.51 - \$7.50	31	27.2
\$7.51 - \$10.00	23	20.2
Greater than \$10.00	21	19.3
TOTAL	113	100.0

When we examined the two major dependent variables by wage categories, one very minor difference resulted. In one cross tabulation, supervisors of workers in the two middle wage categories (i.e., \$5.51 - \$7.50 and \$7.51 - \$10.00) reported no dissatisfactions with the amount of supervision required by those workers. The chi-square for this analysis was .075. Surprisingly, there were no significant findings regarding relationships between older workers' level of pay and supervisors' experiences with older workers.

(g.) Caregiver Status

A sixth older worker characteristic in this study was whether the employee had family caregiving responsibilities. Supervisors were asked: "Does he/she have any family members who rely on him/her for physical care and assistance?" Eighty-one supervisors (77.9 %) responded "no" to this question while 23 (22.1 %) responded "yes". In one cross tabulation, 68.3 % of supervisors of non-caregivers reported that they were "very satisfied" with the way their supervisee met deadlines, while only 43.5 % of supervisors of caregivers

were very satisfied with this job performance item (chi-square - .069). On another job performance item, 13 % of supervisors of caregivers were "dissatisfied" with being able to count on those older workers in a crisis, compared with 2.4 % of supervisors of non-caregivers (chi-square - .099). Although there was a slight trend on other worker characteristic and job performance variables in favor of non-caregivers being more effective employees, these differences were not large.

## 2. Supervisor Characteristics

### (a.) Supervisors' Age

In order to examine the relationship between the age of the supervisor and the two dependent variables, ages were combined into three categories: less than 40 years (N=44); 40-49 years (N=33); 50 years and older (N=36). While no large deficiencies occurred by age, several lesser trends were noted.

While virtually no differences were noted on the worker characteristic set of variables, several did occur on the job performance set. The older supervisors were more likely to be very satisfied with the communication skills of older workers (64.9% as compared with 45.5% among those less than 40 years old and 30.3% among supervisors age 40-49: chi-square significant at .02). Also, the older supervisors reported being more satisfied with the way older workers followed instructions (chi square significant at .06). The younger supervisors, however, reported being more satisfied with two of the job performance variables, "willingness to work overtime" and "meets deadlines."

### (b.) Supervisors' Gender

A slight majority of the supervisors we interviewed in this study (52.2%) were women.

Few differences resulted from cross tabulations run on the two dependent variables by supervisor gender. In two analyses, however, there were significant differences. Women supervisors were far more likely to disagree that their older workers were able to solve problems creatively on the job (25.4 %) than were men supervisors (7.7 %). The chi-square for this cross tabulation was .027. Women also disagreed that their supervisees possessed an "aggressive or competitive spirit" more often than men. Fifteen of the 58 women supervisors who responded to this question (25.9 %) disagreed, whereas only four out of 54 men (7.4 %) disagreed. This analysis was significant at the .03 level.

### (c.) Marital Status

Older workers' marital status was another worker characteristic we examined to answer this part of this research question. Seventy-five (65.8 %) of the older workers in this sample were married. Only one cross tabulation run on all the dependent variables by

marital status yielded a significance level greater than .05. This analysis on the variable "aggressive/competitive spirit" is reported in Table 31.

**TABLE 31**

**IMPORTANCE TO THE SUPERVISOR OF AGGRESSIVE/COMPETITIVE SPIRIT OF OLDER WORKER BY MARITAL STATUS OF OLDER WORKER**

Level of Agreement	Married	Unmarried	Total
Strongly Agree	21.62	21.05	21.43
Agree	68.92	47.37	61.61
Disagree	9.46	31.58	16.96
TOTALS	74	38	112

Chi Square value = 9.1  
 p = .01

The major difference in these cells is located in the "disagree" response. The percentage of supervisors who disagreed that their unmarried employee showed an aggressive or competitive spirit (12 out of a total of 38 unmarried people) was more than three times greater than the total percentage of married workers (7 out of 74). Evidently, being married increases the perception that one has an aggressive spirit, at least in the eyes of supervisors.

**(d.) Hours of Supervision**

Supervisors in this study reported a wide range of time supervising the specific older worker we used as a focal point in the interview. The 113 respondents supervised this specific employee between one (N = 27) and 40 hours per week with a mean supervising time of 7.1 hours. We grouped the average number of hours per week respondents reported supervising their older employee into four categories, as displayed in Table 32.

Findings indicate that older workers who were supervised less frequently were seen in a better light by their supervisors. For example, 35.7 % of supervisors who reported supervising their older worker an average of only one hour per week "strongly agreed" that the worker was creative in solving problems. This compares with 14.8 %, 13.8 %, and 23.3 % for the other three categories (in ascending order). The evidence is even more substantial regarding one of the job performance variables, "meeting deadlines," as reported in Table 33.

**TABLE 32**  
**AVERAGE NUMBER OF HOURS PER WEEK**  
**SUPERVISING OLDER WORKER**  
**(N = 113)**

Time	Frequency	Percent
One hour	27	23.9
2-3 hours	27	23.9
4-9	29	25.7
10 or more hours	30	26.5
TOTALS	113	100.0

**TABLE 33**  
**SATISFACTION OF SUPERVISOR WITH THE WAY OLDER WORKER**  
**MEETS DEADLINES BY NUMBER OF SUPERVISION HOURS**

Level of Satisfaction	1 Hour	2 - 3 Hours	4 - 9 Hours	10 Hours or More	TOTAL
Very Satisfied	82.14	55.56	55.17	56.67	62.28
Satisfied	14.29	44.44	44.83	30.00	33.33
Dissatisfied/ Very Dissatisfied	3.57	0.00	0.00	13.33	4.39
TOTALS	27	27	29	30	113

Chi square value = 15.7  
p = .016

In another variable, commitment to the job (a worker characteristic variable), the two lowest categories of supervision time scored highest on the "strongly agree" response. Table 34 reports these data.



TABLE 34

IMPORTANCE TO THE SUPERVISOR OF OLDER WORKER'S  
COMMITMENT TO THE JOB BY NUMBER OF SUPERVISION HOURS

Level of Agreement	1 Hour	2 - 3 Hours	4 - 9 Hours	10 Hours or More	TOTAL
Strongly Agree	64.29	62.96	37.93	40.00	50.88
Agree	35.71	29.63	62.07	50.00	44.74
Disagree	0.00	7.41	00.00	10.00	4.39
TOTALS	27	27	29	30	113

Chi Square value = 12.7  
p = .05

Brady and Fortinsky (1989) reported in an earlier study funded by the AARP Andrus Foundation that older workers, when asked about levels of supervision, said they preferred not to be closely supervised. In fact, not being closely supervised was a correlate with job retention among older workers in this two state (Connecticut and Maine) study. It appears we are now hearing a similar message from the supervisor's perspective. Supervisors who did not spend a lot of time supervising appeared to be more pleased with selected worker characteristics and job performance traits of newly hired older workers than those who reported spending more time supervising the work of their employees.

(e.) Other Supervisor Characteristics

We collected additional information from the supervisors to use as independent variables in cross tabulations. Supervisors were asked whether or not they had previous experience working with older workers. Sixty-three (55.8 %) responded "no" to this question. There were no major trends evident here, although a couple of chi-squares were significant at the .08 level or greater. Those with previous experience were more apt to "disagree" that older workers learned new procedures and technologies (18 % vs. 4.8 % - chi square at .057). On the other hand, supervisors with previous experience with older workers were more likely to report being very satisfied with their ability to count on the older worker in a crisis (chi-square .066).

We also asked how long the supervisor had been with their present organization. The average tenure among supervisors was slightly more than 10 years (127.2 months) with a range of six months to over 40 years. Nearly half (47.4 %) had been in their respective organizations for five years or longer; another 19.3 % from 3 - 5 years; 24.6 % from 1 - 3 years, and 8.7 % less than one year. On numerous (but not all) variables, supervisors with five or more years in their place of work rated worker characteristics and satisfaction with job performance higher than those with less organizational tenure. An example is reported in Table 35.

TABLE 35

**IMPORTANCE TO THE SUPERVISOR OF CREATIVE PROBLEM SOLVING  
BY OLDER WORKER BY SUPERVISOR'S NUMBER OF YEARS OF SERVICE**

Level of Satisfaction	1 Year or Less	1-3 Years	3-5 Years	5 Years or More	TOTAL
Strongly Agree	10.00	28.57	9.09	25.93	21.93
Agree	70.00	39.29	59.09	72.22	61.40
Disagree/Very Dissatisfied	20.00	32.14	31.82	1.85	16.67
TOTALS	10	27	22	54	113

Chi Square = 20.9  
p = .002

It is important to note not only the "strongly agree" category, but the "disagree" one as well. Only one supervisor out of 54 (1.9 %) with 5 or more years of tenure reported that he disagreed his older supervisee was creative in problem solving. In two of the tenure categories there were statements of disagreement to this worker characteristic among nearly one third of the respondents.

3. Job Characteristics

(a.) Seasonal/Temporary vs. Permanent Work

One of the characteristics of the new job won by older workers that we examined was its status as temporary or permanent. The direct supervisors were asked about this

status. A total of 93 jobs (82.3 %) were deemed "permanent" with the remaining 20 (17.7 %) labeled as seasonal or temporary.

We then examined the relationship between the status of the jobs themselves with our two dependent variables, i.e., older worker characteristics and satisfaction with job performance traits. Table 36 reports selected findings from these cross tabulations.

**TABLE 36**

**SUPERVISORS' RATINGS OF SELECTED WORKERS CHARACTERISTICS  
AND JOB PERFORMANCE TRAITS BY TEMPORARY  
VERSUS PERMANENT PLACEMENT  
(N = 113)**

<b>Worker Characteristics Rated "Strongly Agreed"</b>	<b>Permanent Job</b>	<b>Temporary Job</b>
Creative in Solving Problems	26.9	0.0*
Committed to Job	53.8	40.0
Good Attitude Toward Job	55.9	40.0
Loyal and Dedicated to Organization	55.9	45.0
<b>Job Performance Trait Rated "Very Satisfied"</b>		
Amount of Supervision Worker Needs to Get the Job Done	65.6	40.0*
Willingness to Perform Additional Tasks Not in Job Description	58.9	35.0
Meeting Deadlines	65.6	50.0
Ability to Count on in a Crisis	66.7	45.0**

\* Chi-Square significant at .05

\*\* Chi-Square significant at .001

A trend is apparent here that older workers who are able to find permanent placements are perceived as possessing stronger worker characteristics and are evaluated more highly in job performance than their counterparts who are working in seasonal or temporary jobs. For example, 26.9 percent of the supervisors of permanently employed older workers strongly agreed that they were creative in solving problems compared with none of the supervisors of older workers in seasonal jobs. Supervisors also reported being substantially more satisfied with their ability to count on permanent older workers in a crisis

(significant at .001). Also, they reported being significantly more satisfied with the amount of supervision they had to provide among those in permanent as compared with temporary positions. Other older worker characteristics such as job commitment, good attitude, and loyalty to the organization were more strongly present among those workers in permanent rather than temporary positions.

#### (b.) Full Time vs. Part Time Work

Trends regarding how full time vs. part time work related to our two dependent variables were not as evident as with the seasonal vs. permanent variable. On the worker characteristic series, there were no significant differences. With some items, such as learning new procedures and technologies, creative problem solving, and job commitment, there was a minor preference among supervisors for full-time status. However, on other worker characteristic items, such as getting along with co-workers and loyalty and dedication to the organization, supervisors valued those in part-time jobs slightly more highly.

The results were equally mixed with the job performance trait series. With variables such as physical stamina, amount of supervision required, following instructions, and being able to count on a worker in a crisis, supervisors ranked their satisfaction higher for full-time employees. But on willingness to work overtime and attendance record, supervisors were more satisfied with part-time people.

#### (c.) Requirements of the Job

In order to get a better picture of the nature of the jobs being filled by these newly hired older workers, we designed a multi-item question which asked supervisors to rank on a four-point scale a series of job requirements. After reading each requirement to them, the supervisor was asked to rank whether he/she "strongly agreed," "agreed," "disagreed," or "strongly disagreed" that this requirement was part of the job. Table 37 reports agreement/disagreement (the first two and second two response categories are combined) concerning the presence of these individual job requirements.

We then ran a series of cross tabulations on the two dependent variables by the individual job characteristic items. Appendix B presents four tables wherein two variables from each of the worker characteristic and job performance lists are displayed along with the "presence" or "absence" of these eight job characteristics/requirements.

In these four tables, the eight job characteristics or requirements are listed in the left column. The "Present" and "Absent" column represent whether or not that particular job requirement existed. The numbers in these two columns represent the percent of supervisors who responded "strongly agreed" to the two worker characteristics being portrayed.

TABLE 37

PERCENT OF SUPERVISORS' AGREEMENT/DISAGREEMENT  
WITH THE PRESENCE OF SPECIFIC JOB REQUIREMENTS  
OF OLDER WORKER'S NEW JOB  
(N = 113)\*

Job Characteristic (Requirement)	Agree	Disagree
Job requires learning new things	90	23
Job allows freedom to make decisions about how to do job	91	22
Job requires high level of experience & skill	77	36
Job requires familiarity with computers & technology	42	71
Job requires well developed writing skills	45	68
Job requires communicating with the public	84	29
Job requires working extra hours	72	41
Job requires regular travel	20	93

\* "Strongly Agree" and "Agree" responses combined into "Agree," "Strongly Disagree" and "Disagree" responses combined into "Disagree".

In each of these tables at least one significant difference occurred (there were four significant differences in the "Physical Stamina" by "Job Characteristics" analysis). A consistently important job characteristic appeared to be that the job itself allows the worker freedom to make decisions about how to conduct the work. Workers who have freedom in their new jobs to make decisions about how to do the job are much more likely to be said to have an aggressive or competitive spirit, to have physical stamina and energy, to be counted on in a crisis, and to make satisfactory demands in supervisory time. This finding, combined with the previously noted fact that supervisors prefer those workers to whom they do not have to commit long periods of supervision, helps to support a conclusion from our first A.A.R.P. Andrus Foundation supported older worker study (Brady and Fortinsky, 1989), i.e., that "the freedom factor" is a desirable condition among older workers. Older workers themselves prefer to be given room in which to make decisions about how they're going to perform their jobs and also, as noted earlier in this report, prefer not to be closely supervised. Supervisors are saying similar things about what they prefer in an older worker.

3. Company Characteristics

In order to examine whether or not any relationships existed between the supervisors' views of older workers and the nature of their businesses or organizations, we merged data

files (organizational information was obtained in the DHR interview). Several significant differences occurred in cross tabulations between older workers characteristics and size of company. These cross tabulations are displayed in Tables 38 and 39.

**TABLE 38**

**IMPORTANCE TO THE SUPERVISOR OF OLDER WORKER'S WILLINGNESS TO LEARN NEW PROCEDURE AND TECHNOLOGIES BY ORGANIZATIONAL SIZE**

Level of Agreement	Number of Employees				
	Less than 25	25-99	100-499	500 or More	Total
Strongly Agree	58.82	22.73	29.17	23.08	30.97
Agree	17.65	72.73	62.50	65.38	58.41
Disagree	23.53	4.55	8.33	11.54	10.62
TOTALS	17	22	48	26	113

Chi Square = 14.97  
p = .02

**TABLE 39**

**IMPORTANCE TO THE SUPERVISOR OF OLDER WORKER HAVING A GOOD ATTITUDE TOWARD THE JOB BY ORGANIZATIONAL SIZE**

Level of Agreement	Number of Employees				
	Less than 25	25-99	100-499	500 or More	Total
Strongly Agree	61.11	59.09	56.25	34.62	52.63
Agree	22.22	40.91	41.67	61.54	42.98
Disagree	16.67	0.00	2.08	3.85	4.39
TOTALS	17	22	48	26	113

Chi Square = 13.82  
p = .03

As Table 38 shows, supervisors within the smallest organizations in our sample (i.e., less than 25 employees) were most likely to strongly agree that their newly hired older workers are willing to learn new procedures and technologies. But they were also more likely to disagree than their counterparts in larger organizations that this specific employee trait existed among newly hired elders. One interpretation of this may be that a worker's willingness to learn new procedures and technologies is an especially salient characteristic in smaller organizations, and either the presence or absence of such a trait is keenly felt.

A similar bi-modal response is reflected in Table 39 on the worker characteristic, "good attitude toward job." Supervisors in the smallest companies were both more likely to "strongly agree" and more likely to "disagree" that this trait existed among newly hired older workers. Once again, perhaps workers' attitudes toward their jobs is a more sensitive matter in smaller rather than larger work places.

No significant differences occurred in an examination of company size by supervisor satisfaction with employee job performance. Also, no differences occurred on either dependent variable when we examined them by type of business.

#### Summary of Research Question 4

The following are summary points of the key findings from Research Question #4:

- (1) Worker Characteristics
  - (a) While supervisors valued most of their newly hired older workers, they appeared to pay especially high regard to the youngest (age 50 - 54) of these workers. When asked to rank eight worker characteristic and eight job performance items, supervisors rated the age 50 - 54 group higher than age 55 and older workers on most attributes. It is important to note, however, that nowhere did supervisors suggest that their newly hired workers over the age of 55 were less than effective or valuable to the organization.
  - (b) People with four-year college degrees were rated highly by their supervisors. In almost every case the eight desired worker characteristics were more likely to be reported to be present among the college educated employees.
  - (c) Health status affected the way supervisors rated employees. Older workers with "excellent" or "good" health were deemed more effective performers than their counterparts with a "fair" or "poor" general health status or specific health limitations.



(2) Supervisor Characteristics

- (a) An important supervisor characteristic was the amount of time spent in supervision of the older worker. The evidence was that employees who were supervised less frequently were seen in a better light by their supervisors.
- (b) Supervisors with five or more years of experience in the organization in which they worked at the time of our interview rated older worker characteristics and satisfaction with job performance higher than those with less organizational tenure.

(3) Job Characteristics

- (a) Workers in permanent as compared with temporary or seasonal jobs were perceived by their immediate supervisors as possessing more desirable worker characteristics and having superior job performance. This is particularly true regarding variables such as being able to count on the worker in a crisis and satisfaction with the amount of supervision time the worker requires.
- (b) Freedom to make decisions about how the job is going to get done appears to relate to favorable worker characteristics and performance.

(4) Company Characteristics

Few differences occurred by size or type of company. Supervisors within the smallest organizations (i.e., less than 25 employees) seemed to be particularly sensitive to two worker traits, "willingness to learn new technologies" and "good attitude toward work." Perhaps these employee characteristics have a greater impact on the workplace in organizations where there are not large staffs and where there may be a concomitant reduction in job specialization.

## IV. CONCLUSIONS AND RECOMMENDATIONS

### A. Major Conclusions

The major conclusions derived from this study of organizations' views of newly hired older workers fall into two areas: (1) older workers as perceived by Directors of Human Resources, the organizational leaders who typically have responsibility for hiring personnel; and (2) older workers as perceived by direct supervisors, those managers within the workplace who have close and often daily contact with their subordinates.

#### 1. Directors of Human Resources

(a) One major conclusion of this study is confirmatory of the mainstream literature published to date on older workers. In general, senior officers who are charged with setting employee policy and who often actually hire new workers had strongly positive views of older workers. They were motivated to hire older workers for myriad reasons, many of which have been documented in the gerontological and work-related literatures: reliability, wealth of experience, superior work ethic, and general excellence as employees.

(b) Intrinsic work values appeared to outweigh extrinsic qualities in the mind of DHR's. Employee characteristics such as the 'ability to make independent decisions, creative problem solving, learning new things, and adapting to new technologies were more important motivations-to-hire than seeking permanent placement, wanting promotion and advancement, or other extrinsic qualities. The finding correlates positively with earlier research conducted by this research team in which older workers reported holding strong intrinsic values and motivations toward work (Brady and Fortinsky, 1989).

(c.) We found four factors in DHR motivations to hire older workers. We named these "Extrinsic: Full-Time," "Extrinsic: Part-Time", "Intrinsic: Personal Characteristics," and "Intrinsic: Fit." While DHRs make distinctions between extrinsic and intrinsic worker qualities, they also make distinctions between those seeking full time and part time work.

(d) Worker qualities organizations sought varied by type of industry. Manufacturing businesses sought older workers who showed an aggressive or competitive spirit, who were looking for permanent placements in their new jobs, and who were willing to work flexible hours. Education and health/social service organizations wanted people who were willing to be flexible in the tasks they performed. "Extrinsic Part-Time" qualities (i.e., flexibility in hours worked, wanting to supplement income, using skills from previous jobs) were most important for retail, wholesale, and service types of jobs while "Intrinsic Personal Characteristics" (i.e., making independent decisions, creative problem solving) were most important for educational organizations.

(e) DHR's sought different worker characteristics according to organization size. Small companies sought older workers who could make independent decisions, work flexible hours, and solve problems on the job, perhaps suggesting the need for employee adaptability. DHR's in larger organizations hired people who were willing to learn new technologies.

(f) The personal characteristics of DHR's appeared to influence the importance attached to older worker qualities. Women who hired older workers were motivated than their male counterparts by intrinsic factors such as older workers' ability to make independent decisions, flexibility in tasks performed, and creative problem solving. Younger DHR's placed more value on the workers having an aggressive/competitive spirit, problem solving ability, and willingness to learn new things. And DHR's with longer experience on the job were more likely to be motivated to hire older applicants who showed strong intrinsic qualities.

## 2. Supervisors

(a) Most supervisors reported strongly positive feelings toward newly hired older workers. They gave superlative ratings to older workers' loyalty to the organization, ability to get along with co-workers, general attitude toward work, and other crucial job characteristics. As a consequence of little variation, no factors regarding older worker qualities or job performance emerged from the supervisors' point of view.

(b) Supervisors have the opportunity to be more frank about older workers than DHRs. They did not respond to questions with as much caution as DHRs who, as a whole, were more familiar with the Age Discrimination in Employment Act, The Equal Employment Opportunity Commission, and other regulations governing the work place. Unlike DHR's, who often went out of their way during the interview to suggest that older and younger workers were similar, supervisors saw a distinction. They saw older workers being more attentive to detail, having fewer absences, and displaying greater enthusiasm toward work. Each of these attributes influence the day-to-day culture of the workplace, and direct supervisors are often in a position to be personally affected by them.

(c) Regarding job performance, while supervisors were very satisfied with numerous performance criteria, the one they rated highest among newly hired older workers was attendance. The job performance criterion with which they were least satisfied was the older worker's willingness to perform additional tasks not in the job description.

(d) The reasons for some supervisors being dissatisfied with older workers seemed to group around memory deficit, lack of aggressiveness, and other characteristics which appeared to relate to mental capacity or disposition.

(e) Older workers are heterogeneous, and differences occurred in supervisors' ratings by selected worker characteristics. For example, supervisors paid especially high regard to the youngest of the older workers in our sample (age 50 - 54), workers with college degrees, those who generally had excellent or good health, and workers who had no specific health limitations.

(f) The amount of time spent supervising a new worker appeared to be important. The evidence was that employees who were supervised less frequently were seen in a better light by their supervisors.

(g) Selected job characteristics also appeared to affect supervisor evaluation. Workers in permanent as compared with temporary or seasonal jobs were perceived by their immediate supervisors as possessing more desirable worker characteristics and having superior job performance. Also, jobs in which workers were free to make decisions about how the work was going to get done appeared to relate to favorable worker characteristics and performance.

## **B. Major Recommendations**

Recommendations from the data collected in this study are made for: (1) aging network and employment service practitioners; and (2) further gerontology research.

### **1. For Aging Network and Employment Practitioners**

(a) While DHRs and supervisors both, and nearly unequivocally, valued older workers, they often saw circumstances differently. Perhaps a good recruitment and hiring strategy would be for direct supervisors to have input in the hiring decisions within organizations. In many businesses this may be standard policy. In others, human resources professionals maintain control over this important function. Supervisors are often deeply affected by the caliber of job performance of workers and would make, we believe, important contributions concerning the "fit" between potential employee, job requirements, and work culture.

(b) Employers, job service counselors, job-bank personnel, and others engaged in employment services ought to realize the high value placed on older workers by businesses and other organizations. In general, newly hired workers over the age of 50 received accolades from over 200 senior organizational officers and first-line supervisors. While differences among individual workers will always exist, it is important to recognize that most older workers can and do make excellent employees.

(c) Many people do not work exclusively for money and other material rewards. Intrinsic work values, such as the meaning of the work itself and the sense of satisfaction work brings, ought not to be overlooked when attempting to place or directly hire an older worker. Brady and Fortinsky (1989), in an earlier AARP Andrus Foundation funded

study, reported the crucial nature of intrinsic work values among older workers who were seeking employment. This study points to the fact that employers also seek individuals who have positive intrinsic work values, that is, who seek psychic as well as financial income from their jobs.

(d) It is important to be realistic about what older workers can and cannot do. Employers reported that older workers' general health status and absence of physical limitations were important attributes for successful employment. While this study does not suggest that elders with physical disabilities "need not apply," it is clear that most workplaces are seeking individuals who have the physical energy and capacity to fulfill organizational needs. Most elders in this research study apparently met this standard.

(e) The "freedom factor," that is, workers having a degree of flexibility about how to get the job done and not being too closely supervised, appeared to be a compelling condition for optimal performance. Older workers want this freedom (Brady and Fortinsky, 1989). And in this study, supervisors reported that they prefer workers with whom they do not need to spend a lot of time in direct supervision. Consequently, older workers ought to stress their ability to take responsibility and work with a reasonable degree of independence from close supervision when interviewing for a job. An exception may be in manufacturing jobs or other employment sectors where strong unions, seniority systems, and supervision policies exist.

(f) Finally, it is important that older workers themselves realize their value in the workplace. Too often older persons in between jobs, beginning paid work after a career in the home, or otherwise seeking employment in later life doubt their worth (Hale, 1990). This study points to the fact that older workers are excellent human resources and are highly valued by the organizations who hire them.

## 2. For Further Gerontology Research

(a) This study focused on organizations in three New England states who, for the most part, already had track records hiring older workers. Therefore, the lack of variation in responses is really not surprising. Using a randomly selected sample of organizations would increase the variation in dependent variables, such as DHR and supervisor views of older worker qualities and job performance.

(b) Most research reported in the literature has examined the views of chief executive officers or other senior managers within organizations. This study demonstrated that supervisors, while typically "lower" in the organizational hierarchy than senior managers, often work side-by-side on a daily basis with subordinates, thus offering a unique and valuable perspective. Future research in the area of organizational perspectives on older workers must involve more first-line supervisors.

(c) The heterogeneity of both older workers and the organizations which hire them need to be further explored. Workers in their fifties are different from those in their seventies. Also, manufacturing jobs are different from those in education. This study has begun to explore these variations, but further investigation is needed.

(d) The heretofore mentioned "freedom factor," i.e., the desire on the part of both older workers and their supervisors to have some independence and supervisory distance, requires further exploration. It appears to be an important variable in both the self-evaluation of older workers and the evaluation of older workers by their direct

supervisors. Perhaps widening the research methods beyond those used in this study could shed more light on this phenomenon.

(e) A number of research projects, including this one, have used either paper and pencil or telephone surveys to collect data on older workers. Perhaps studies in the future could, at least in part, collect data by using case study, critical incident, or other more qualitative approaches. Such efforts might lead to increased understanding of the role of older workers in their specific work units, nuances concerning their relationships with co-workers and supervisors, and other important information that can only be collected in a limited manner via survey research.



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**APPENDIX A - ADDITIONAL DHR DATA (TYPE OF INDUSTRY)**

Cross Tabulation: Importance to DHR of Aggressive/Competitive Spirit by  
Type of Industry

Cross Tabulation: Importance to DHR of Seeking Permanent Placement by  
Type of Industry

APPENDIX A

CROSS TABULATION: IMPORTANCE TO DHR OF AGGRESSIVE/COMPETITIVE SPIRIT BY TYPE OF INDUSTRY

Frequency Patterns Column %	Manufacturing	Retail/ Wholesale/ Services	Business/ Finance	Health/Social Services	Education	Public Administration/ Utility
Very Important	7 6.67% 38.9%	7 6.67% 35.0%	7 2.86% 15.79%	6 5.71% 24.0%	0 0% 0%	1 0.95% 8.33%
Somewhat Important	7 6.67% 38.89%	9 8.57% 45.07%	7 6.67% 36.84%	3 2.86% 12.0%	3 2.86% 27.27%	4 3.81% 33.33%
Not Very Important	4 3.81% 22.22%	4 3.81% 20.0%	9 8.57% 47.37%	16 15.24% 64.0%	8 7.62% 72.73%	7 6.67% 58.33%

Statistic

DF

Value

Probability

Chi-Square

10

21.19

.02

APPENDIX A

CROSS TABULATION: IMPORTANCE TO DHR OF SEEKING PERMANENT PLACEMENT BY TYPE OF INDUSTRY

Frequency Patterns Column %	Manufacturing	Retail/ Wholesale/ Services	Business/ Finance	Health/Social Services	Education	Public Administration/ Utility
Very Important	13 12.5% 72/22%	8 7.67% 40.0%	4 3.85% 21.05%	7 6.73% 2.8%	1 0.96% 10%	5 4.81% 41.67%
Somewhat Important	2 1.92% 11.11%	6 5.77% 30.0%	10 9.62% 52.63%	9 8.65% 36.0%	5 4.81% 50.0%	5 4.81% 41.67%
Not Very Important	3 2.88% 16.67%	6 5.77% 30.0%	5 4.81% 23.32%	9 8.65% 36.0%	4 3.85% 40.0%	2 1.92% 16.67%

Statistic                      DF                      Value                      Probability  
 Chi-Square                      10                      18.09                      .05

**APPENDIX B - ADDITIONAL SUPERVISOR DATA (JOB CHARACTERISTICS)**

Percent of Supervisors who "Strongly Agreed" that Older Worker Had Physical Stamina and Energy by Job Characteristics

Percent of Supervisors who "Strongly Agreed" that Older Workers had an Aggressive or Competitive Spirit by Job Characteristics

Percent of Supervisors who were "Very Satisfied" with Being Able to Count on Older Workers in a Crisis by Job Characteristics

Percent of Supervisors who Were "Very Satisfied with Amount of Supervision by Job Characteristics

## APPENDIX B

### TABLE 1

#### PERCENT OF SUPERVISORS WHO "STRONGLY AGREED" THAT OLDER WORKER HAD PHYSICAL STAMINA AND ENERGY BY JOB CHARACTERISTICS

Job Characteristic	Percent	Absent
Job Required Learning New Things	40.0	26.1*
Freedom to Make Decisions About How to Do the Job	41.8	18.1*
Job Required High Level of Experience and Skill	42.9	25.0**
Job Required Familiarity with Computers and Technology	50.0	29.6*
Job Required Well Developed Writing Skill	44.4	32.4
Job Required Communicating With the Public	40.5	27.6
Job Required Working Extra Hours	38.9	34.2
Job Required Regular Travel	35.0	38.0

\* Chi Square Significant at .07

\*\* Chi Square Significant at .03



## APPENDIX B

### TABLE 2

#### PERCENT OF SUPERVISORS WHO "STRONGLY AGREED" THAT OLDER WORKER HAD AN AGGRESSIVE OR COMPETITIVE SPIRIT BY JOB CHARACTERISTICS

Job Characteristic	Percent	Absent
Job Required Learning New Things	20.5	26.1
Freedom to Make Decisions About How to Do the Job	27.0	0.0*
Job Required High Level of Experience and Skill	26.3	11.4**
Job Required Familiarity with Computers and Technology	12.5	26.8
Job Required Well Developed Writing Skills	27.9	17.7
Job Required Communicating With the Public	23.2	17.2
Job Required Working Extra Hours	25.7	14.6
Job Required Regular Travel	25.0	20.9

\* Chi Square Significant at .02

\*\* Chi Square Significant at .01

## APPENDIX B

### TABLE 3

#### PERCENT OF SUPERVISORS WHO WERE "VERY SATISFIED" WITH BEING ABLE TO COUNT ON OLDER WORKERS IN A CRISIS BY JOB CHARACTERISTICS

Job Characteristic	Percent	Absent
Job Required Learning New Things	65.6	52.2
Freedom to Make Decisions About How to Do the Job	68.1	40.9*
Job Required High Level of Experience and Skill	70.1	47.2**
Job Required Familiarity with Computers and Technology	57.1	66.2
Job Required Well Developed Writing Skills	71.1	57.4
Job Required Communicating With the Public	64.3	58.6
Job Required Working Extra Hours	63.9	61.0
Job Required Regular Travel	65.0	63.0

\* Chi Square Significant at .05

\*\* Chi Square Significant at .06

APPENDIX B

TABLE 4

PERCENT OF SUPERVISORS WHO WERE "VERY SATISFIED" WITH  
AMOUNT OF SUPERVISION BY JOB CHARACTERISTICS

Job Characteristic	Percent	Absent
Job Required Learning New Things	61.1	60.9
Freedom to Make Decisions About How to Do the Job	65.9	40.9*
Job Required High Level of Experience and Skill	66.2	50.0
Job Required Familiarity with Computers and Technology	57.1	63.4
Job Required Well Developed Writing Skills	68.9	55.9
Job Required Communicating With the Public	60.7	62.1
Job Required Working Extra Hours	62.5	58.5
Job Required Regular Travel	55.0	62.0

\* Chi Square Significant at .03

**APPENDIX C - EMPLOYER CONTACT PROTOCOLS**

Project Summary

Letter

Postcards



# UNIVERSITY OF SOUTHERN MAINE

Human Services Development  
Institute

Page 1 of 1  
Date: 11/17/11  
Page 1 of 1

## **EMPLOYERS' VIEWS ON THE VALUE OF OLDER WORKERS**

### **Project Summary**

#### **Age Issue a Cutting Edge in the Workplace**

The demographics of the workforce are shifting; more and more of us in the future will be changing careers after the age of 50 or continuing to work past present retirement age.

The process of hiring an older worker, the expectations of the employer for the older worker, the possibilities for promotion and training of an older worker, how the workplace setting and supervision of an older worker are structured, and the perceived advantages or disadvantages of hiring an older worker are all issues which need to be looked at by employers, supervisors, gerontology professionals, and the working public at large.

#### **Research Funded by AARP**

Researchers at the University of Southern Maine are conducting a project funded by a grant from the AARP Andrus Foundation. This study will examine:

- o Why employers hire older workers (aged 50 or older);
- o How highly employers value older workers who have been hired in the recent past.

#### **Seeking Answers to Questions**

The researchers are looking for insight into these questions:

- o What motivates employers to recruit and hire older workers?
- o Do the characteristics of different companies influence the motivation of employers in hiring older workers?
- o How satisfied are supervisors with recently-hired older workers in their companies?
- o How do supervisors' experiences with older workers vary depending on the characteristics of the company, the older employee, the job, and the supervisor?

### Selection of Employers

The research will be conducted in three (3) New England states — Connecticut, Maine, and New Hampshire. We plan to interview between 30 and 40 employers in each state, for a total sample of 100 employers.

In Connecticut and Maine, the sample will be drawn from employers represented in a previous study. The sample in New Hampshire will be referred by the Senior Community Services Employment Program, the Green Thumb Program, and State-level employment agencies.

### Interviews With Human Resource Directors and Supervisors

The researchers will interview both the Director of Human Resources (DHR) and a direct supervisor of a recently hired older worker within each company.

The DHR will be interviewed by phone concerning specific qualities companies look for when hiring older workers, benefits to the company of hiring older workers, and characteristics of both the DHR and the company.

The individual supervisor will also be interviewed by phone and asked questions about his/her level of satisfaction with the older worker's performance, as well as the benefits and liabilities involved in supervising newly-hired older workers.

### Confidentiality

No individuals or companies will be named in any reports from this research. Names of older workers will not be requested or recorded by the research team.



# UNIVERSITY OF SOUTHERN MAINE

Human Services Development  
Institute

96 Falmouth Street  
Portland, Maine 04103  
207/780-4430  
FAX 207, 780-4417

August 22, 1990

Mr. ABC  
Director  
Human Resources  
Corporation, XYZ  
Portland, ME

Dear :

We have had the recent good fortune to receive a research grant from the AARP Andrus Foundation in Washington, D.C., to study employers' views about the value of older workers. The enclosed description provides more detail about our study. Since your company has a track record of hiring older workers, we are particularly interested in learning about your experiences with older workers.

We'd like to have your help. In September and October we plan to conduct phone interviews with human resource managers and direct supervisors of older workers (defined as age 50 or over) hired since January 1, 1988 and still in your employ. In the human resource manager's interview we are going to explore the company's motivations for hiring older workers and what qualities the company looks for in these employees. In the supervisor's interview we are interested in learning that person's appraisal of the worker as well as information about the specific job being performed. We expect each of these telephone interviews to last approximately 15 minutes.

Results of this study will be shared with job banks, state employment service units, private businesses, and the public at large (via newspaper articles). However, the names of individual companies and employees will be kept anonymous in all disseminations of the study's findings.

To participate in our research, please complete and return the postcard included with this letter. Be sure to note when the best time would be for us to call you. We appreciate your consideration.

If you have any questions about this project before returning the postcard, please feel free to call either one of us. Thank you for your assistance with our project.

Sincerely,

E. Michael Brady, Ph.D.  
Professor of Human Resource Development  
(207) 780-5312

Richard H. Fortinsky, Ph.D.  
Research Associate  
(207) 780-4451 or 780-4430

/mc  
enclosures

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\_\_\_\_\_ I will be glad to participate in your study about Employers' Views on the Value of Older Workers (please complete section below).

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Ext.: \_\_\_\_\_

Best time to call \_\_\_\_\_

\_\_\_\_\_ I would prefer not to participate because \_\_\_\_\_

\_\_\_\_\_

Thank you

For Your Time

We at the University of Southern Maine are talking with organizations about their experiences with recently hired older workers. The Director of Human Resources of your company referred you for a short telephone interview about your own experiences in supervising such workers. We will call you in the next 3-4 weeks.

Please call if you have any questions. Ask For Kari Koss or Rick Fortinsky

Oider Workers Project  
University of Southern Maine  
780-4430

Thanks for your participation.

**APPENDIX D - SURVEY INSTRUMENTS**

DHR Instrument

Question by Question Instructions for the DHR Instrument

Supervisor Instrument

Question by Question Instructions for the Supervisor Instrument

Site Visit Interview Questions

OLDER WORKER EMPLOYER PROJECT  
DIRECTOR OF HUMAN RESOURCES SURVEY

OCTOBER 1990

Hello. May I please speak to \_\_\_\_\_. I'm \_\_\_\_\_ from the University of Southern Maine. Recently we sent you a letter regarding a research study on employers of older workers and you returned a postcard to us in which you agreed to participate. We are interested in your experience, as an employer, with older workers in your organization. We would like to ask some questions about the hiring and employment of older workers. We define an older worker as anyone 50 years of age or older. Your cooperation will help employers and other organizations understand how older workers best succeed in a variety of employment situations.

The answers you give are completely confidential and will not be used in any way that associates them with your name. It will be impossible to tell who said what to each question. Also, please note that I am reading this to you off a computerized questionnaire.

SCREENING QUESTION - First, has your organization hired any older workers, that is workers 50 years of age or older, since January 1988?

YES -----> CONTINUE WITH SURVEY

NO -----> THANK R AND TERMINATE INTERVIEW

1. Does your organization actively recruit older workers to fill job openings?

YES

NO

2. Are there any special qualities your organization looks for when recruiting and hiring older workers?

YES

NO -----> GO TO Q4 INTRO.

2a. What are those qualities?

---

---

Any others? \_\_\_\_\_

---

3. Are these different from special qualities your organization looks for when hiring and recruiting younger workers, that is, those workers younger than 50 years of age?

YES

NO

3a. What special qualities do you look for in younger workers?

---

---

Any others? \_\_\_\_\_

---

4. Now, I am going to read a list of employee characteristics. For each one, I'd like you to tell me how important it is for your organization that older workers, that is, age 50 and older, show these characteristics at the time you are considering hiring them. First . . .

4a. How important is it to your organization at the time you are considering hiring them that older workers are willing to learn new things? Is it very important, somewhat important, not very important, or not at all important?

VERY IMPORTANT

SOMEWHAT IMPORTANT

NOT VERY IMPORTANT

NOT AT ALL IMPORTANT

DK

NA

4b. How important is it to your organization at the time you are considering hiring them that older workers have the ability to make independent decisions? Is it very important, somewhat important, not very important, or not at all important?

VERY IMPORTANT  
SOMEWHAT IMPORTANT  
NOT VERY IMPORTANT  
NOT AT ALL IMPORTANT  
DK  
NA

4c. How important is it to your organization that at the time you are considering hiring them that older workers are flexible in the hours they will work? Is it very important, somewhat important, not very important, or not at all important?

VERY IMPORTANT  
SOMWHAT IMPORTANT  
NOT VERY IMPORTANT  
NOT AT ALL IMPORTANT  
DK  
NA

4d. How important is it to your organization at the time you are considering hiring them that older workers apply in their new jobs skills they have developed during previous jobs? Is it very important, somewhat important, not very important, or not at all important?

VERY IMPORTANT  
SOMEWHAT IMPORTANT  
NOT VERY IMPORTANT  
NOT AT ALL IMPORTANT  
DK  
NA

4e. How important is it to your organization at the time you are considering hiring them that older workers be flexible about doing a variety of tasks in their work? Is it very important, somewhat important, not very important, or not at all important?

VERY IMPORTANT  
SOMEWHAT IMPORTANT  
NOT VERY IMPORTANT  
NOT AT ALL IMPORTANT  
DK  
NA

4f. How important is it to your organization at the time you are considering hiring them that older workers be willing to adapt to new technologies in the workplace? Is it very important, somewhat important, not very important, or not at all important?

VERY IMPORTANT  
SOMEWHAT IMPORTANT  
NOT VERY IMPORTANT  
NOT AT ALL IMPORTANT  
DK  
NA

4g. How important is it to your organization at the time you are considering hiring them that older workers be creative in solving problems on the job? Is it very important, somewhat important, not very important, or not at all important?

VERY IMPORTANT  
SOMEWHAT IMPORTANT  
NOT VERY IMPORTANT  
NOT AT ALL IMPORTANT  
DK  
NA

4h. How important is it to your organization at the time you are considering hiring them that older workers exhibit an aggressive or competitive spirit in their work? Is it very important, somewhat important, not very important, or not at all important?

VERY IMPORTANT  
SOMEWHAT IMPORTANT  
NOT VERY IMPORTANT  
NOT AT ALL IMPORTANT  
DK  
NA

4i. How important is it to your organization at the time you are considering hiring them that older workers seek permanent placement in their new jobs? Is it very important, somewhat important, not very important, or not at all important?

VERY IMPORTANT  
SOMEWHAT IMPORTANT  
NOT VERY IMPORTANT  
NOT AT ALL IMPORTANT  
DK  
NA

4j. How important is it to your organization at the time you are considering hiring them that older workers seek promotion and advancement in their work? Is it very important, somewhat important, not very important, or not at all important?

- VERY IMPORTANT
- SOMEWHAT IMPORTANT
- NOT VERY IMPORTANT
- NOT ALL IMPORTANT
- DK
- NA

4k. How important is it to your organization what at the time you are considering hiring them that older workers are seeking fringe benefits in their new jobs? Is it very important, somewhat important, not very important, or not at all important?

- VERY IMPORTANT
- SOMEWHAT IMPORTANT
- NOT VERY IMPORTANT
- NOT AT ALL IMPORTANT
- DK
- NA

4l. How important is it to your organization at the time you are considering hiring them that older workers want medical insurance at their new jobs? Is it very important, somewhat important, not very important, or not at all important?

- VERY IMPORTANT
- SOMEWHAT IMPORTANT
- NOT VERY IMPORTANT
- NOT AT ALL IMPORTANT
- DK
- NA

4m. How important is it to your company at the time you are considering hiring them that older workers are seeking income to supplement retirement benefits? Is it very important, somewhat important, not very important, or not at all important?

- VERY IMPORTANT
- SOMEWHAT IMPORTANT
- NOT VERY IMPORTANT
- NOT AT ALL IMPORTANT
- DK
- NA

4n. Are there any other characteristics that I have not mentioned that are important for organization when you are considering hiring older workers?

- YES
- NO -----> Q4n



40. What are those characteristics?

---

---

Any others? \_\_\_\_\_

---

INTRO

Now, I have a couple of questions about newly hired older workers in your organization, that, is those hired since January 1988.

5. Do you offer newly hired older workers the same opportunities and benefits as older workers who have been there longer?

YES -----> GO TO Q6.

NO -----> ASK Q5a.

5a. How are the opportunitites and benefits for newly hired older workers are different than those of older workers who have been there longer?

---

---

6. How many older workers, that is workers 50 years of age or older, have you hired since January 1988?

\_\_\_\_\_ # OF OLDER WORKERS

7. Please tell me about how many of your newly hired older workers fall into the following age groups. About how many are:

50 - 59 \_\_\_\_\_

60 - 64 \_\_\_\_\_

65 or older \_\_\_\_\_

8. About how many of these newly hired older workers are male and how many are female?

\_\_\_\_\_ # OF MALES

\_\_\_\_\_ # OF FEMALES

9. Are most of the jobs filled by newly hired older workers part time or full time?  
PART TIME  
FULL TIME

10. How many hours per week does the average newly hired older worker work?  
\_\_\_\_\_ # of hours

11. Please tell me about the position in your organization which is most often filled by newly hired older workers. What is made or done in this position?

\_\_\_\_\_  
\_\_\_\_\_

12a. Are there any other jobs in your organization which are filled by newly hired older workers? YES  
NO -----> GO TO NEXT INTRO.

12b. Please tell me what these jobs are.

\_\_\_\_\_  
\_\_\_\_\_

INTRO

Now we would like to ask you some questions on your organization's policies towards all older workers, that is those workers who are 50 years <sup>or</sup> age or older.

13a. Do older workers in your organization have access to training programs?  
YES  
NO ACCESS -----> GO TO Q14.  
NO TRAINING PROGRAMS -----> GO TO Q14.

13b. Are training opportunities for older workers the same as or different from those for younger workers in your organization?  
SAME -----> GO TO Q14.  
DIFFERENT

13c. How are training opportunities for older workers different than those for younger workers?

---

---

14. Do older workers in your company receive performance appraisals?

YES

NO PERFORMANCE APPRAISALS ----- > GO TO Q15a.

NO FOR OLDER WORKERS ----- > GO TO Q15a.

14a. Do older workers receive performance appraisals that are the same as or different from those of younger workers?

SAME ----- > GO TO Q15a

DIFFERENT

14b. How are the performance appraisals of older workers different than those of younger workers?

---

---

15a. Are there opportunities for promotion and advancement for the older workers in your organization?

YES

NO ----- > GO TO Q16a.

15b. Do these opportunities include salary increases?

YES

NO

15c. Do these opportunities include bonuses?

YES

NO

15d. Do these opportunities include increasing complexity and responsibility in job tasks?

YES

NO

15e. Do these opportunitites include job advancements?

YES

NO

15f. Are there any other opportunities for promotion and advancement for older workers in your organization?

YES

NO -----> GO TO Q 15h

15g. What are the other opportunities?

---

---

15h. Are the opportunities for promotion and advancement for older workers the same as or different from those for younger workers?

SAME -----> GO TO Q16a

DIFFERENT

15i. How are the opportunities for promotion and advancement different for older workers than for younger workers?

---

---

16a. Do older workers in your organization receive health care benefits?

YES ALL OLDER WORKERS

YES SOME OLDER WORKERS (PLEASE SPECIFY: \_\_\_\_\_.)

NO -----> GO TO Q17

16b. Are the health care benefits that older workers receive the same as or different from those received by younger workers?

SAME

DIFFERENT

17. Does your organization offer a pension or 401K plan to older workers?

YES

NO

18. Do you believe that employing older workers has specific benefits for your organization?

YES -----> ASK Q18a.

NO -----> GO TO Q18b.

18a. What are these benefits?

---

---

Any others? \_\_\_\_\_

---

**GO TO Q19.**

18b. Why do you feel there are no benefits to employing older workers?

---

---

19. Are there any liabilities to your organization from employing older workers?

YES

NO ----- > GO TO Q19b.

19a. What are the liabilities of employing older workers?

---

---

Any others? \_\_\_\_\_

---

INTRO

Next, I have a few questions about the organization where you are employed.

20. What kind of business or industry is your organization?

---

21. How many employees work for your organization at all location?  
LESS THAN 25  
25 - 49  
50 - 99  
100 - 499  
500 OR MORE

22. Does your company offer any of the following alternative work structures?

22a. . . . phased in retirement?

- YES
- NO
- DK
- NA

22b. . . . job sharing?

- YES
- NO
- DK
- NA

22c. Does your company offer job redesign?

- YES
- NO
- DK
- NA

22d. . . . reduced work week?

- YES
- NO
- DK
- NA

22e. . . . flex time?

- YES
- NO
- DK
- NA

22f. Does your company offer flex place?

- YES
- NO
- DK
- NA

22g. Are there any other alternative work structures that your organization offers any employee?  
YES  
NO -----> GO TO NEXT INTRO.

22h. What other alternative work structures does it offer?

---

---

INTRO

Finally, I have a couple of questions about you.

23. What is your date of birth?

---

(MM/DD/YY)

24. How long have you worked for this company?

\_\_\_\_\_ # OF YEARS      \_\_\_\_\_ # OF MONTHS

25. How long have you been the director of human resources or in charge of personnel for this organization?

\_\_\_\_\_ # OF YEARS      \_\_\_\_\_ # OF MONTHS

26. What is the last grade in school you have completed so far?

- LESS THAN 12TH
- HIGH SCHOOL OR GED
- TECHNICAL OR VOCATIONAL SCHOOL
- SOME COLLEGE OR ASSOCIATE DEGREE
- COLLEGE GRADUATE
- SOME GRADUATE WORK
- GRADUATE DEGREE

27a. Before joining this organization, did you have any experience hiring older workers?

YES  
NO -----> GO TO NEXT INTRO

27b. Please describe your past experience hiring older workers.

---

---



INTRO

Now, for my last question.

- 28. Please give us the names and phone numbers of three people who supervise older workers who have been hired since January 1988 at your organization. We will pick one of these names at random to interview about their experience as the supervisor of a newly hired older worker.

NAME

PHONE #

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

INTERVIEWER NOTES

IF SAME PHONE NUMBER AS DHR CURRENTLY BEING INTERVIEWED - PLEASE VERIFY NUMBER. PHONE \_\_\_\_\_.

NUMBER OF NAMES GIVEN:

- 1 NAME
- 2 NAMES
- 3 NAMES
- NONE

IS ONE OF THESE NAMES THE SAME AS THAT OF THE DHR WHO IS CURRENTLY BEING INTERVIEWED?

- YES
- NO

Thank you very much for your time and your participation in the study. Your answers have been very helpful. Do you have any comments that you would like add?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

PLEASE COMPLETE INTERVIEWER RECORD

INTERVIEWER RECORD

INTERVIEWER NUMBER.....

DATE OF INTERVIEW..... / /

SEX OF RESPONDENT ..... MALE FEMALE

WAS RESPONDENT..... COOPERATIVE UNCOOPERATIVE

ANY OTHER COMMENTS YOU WOULD LIKE TO MAKE

---

---

---

## DIRECTOR OF HUMAN RESOURCES SURVEY

### QUESTION BY QUESTION OBJECTIVES

#### SCREENING QUESTION

The purpose of this question is to make sure that the R meets the basic criteria of the study, even if the employee no longer works there.

If the DHR listed is no longer working for this organization, ask if the R has any experience hiring since January 1988 older workers in the organization. IF YES, go ahead with the interview, IF NO, ask to speak with someone else who has had experience hiring older workers.

If the R is a new DHR, hired since the response card was returned, and has no experience hiring older workers within this organization, this disqualifies the R from participating. We are looking for a person who has a sense of the organization's history in hiring older workers.

The R does not have to document the DOB of the employees; if he/she knows of employees in the general age group around 50 years old, this is sufficient.

Try to be as inclusive as possible when screening Respondents.

Q1. Actively recruit is defined as making a conscious effort to recruit.

Q2. Here we are looking for qualities that R judges to be specific to older workers.

In the sub-part of this question, try to elicit as few words as possible, that is, one or two adjectives.

Q3. We are asking for the difference in qualities that the employer is looking for when hiring younger workers.

Q4. All sub-parts of this question ask responses on the same scale: very important, somewhat important, not very important, not at all important.

Do not define the items for the R. Rather, read the question again, and ask the R to listen again, or to define the item in his/her own words.

4n&o. When you ask for characteristics not previously mentioned, take down the R's answer, even if it sounds similar to those already mentioned.

Q5. These questions refer to the difference between workers 50 or older who are recently hired and those who aged in place, that is, began working for the organization when younger, and are now over 50.

Q6. If R does not know the exact number, an approximation is acceptable.

Q7. Again, approximations are fine. It is not necessary for R to check records to be exact.

Q8. Approximate numbers are needed here, not percentages.

Q9. It is not necessary for the R to meet any specific definition for full or part-time work. Whatever is considered full or part-time work in that organization satisfies the definition.

Q10. Here we are asking for specific number of hours. If R seeks clarification, ask him/her to visualize an average newly hired worker. Probe for a specific number.

Q11. Here we would like both the job title and an explanation of the job in behavioral terms, that is, what does the employee do or make?

The R can choose any job to describe, if there are several to choose from which are filled equally.

Q12. For these questions, the R can give either job titles, if they are self-explanatory, or brief job descriptions.

Q13. This question refers to ongoing training programs, after initial training.

In the sub-parts to this question, we are trying to discover if the older worker is singled out for more or less training, and if there are substantive differences in the training programs. (We are interested in both quantity and quality.)

Q14. This item refers to regularly scheduled performance appraisals, not just day to day supervision or feedback.

If the R hesitates for these answers, remind him/her that all data is confidential.

The next sub-part of this question refer to any difference between the scheduling or the substance of appraisals of older and younger workers.

Q15. These questions aim at establishing the opportunities for moving forward or upward in the organization. They also ask the R to identify the way that an older worker can advance.

- 15i. Here we are interested in actual differences expressed in specific behavioral terms.
- Q16. These questions refer to an established health care plan which the organization offers its workers as a benefit.

Q16a. All or some refers to older workers.

If R differentiates between full or part time worker, mark all or some.

Q18. Try to probe for brief but exact words describing the specific benefits. If the R sounds vague, ask for examples.

Q19. These items aim at defining the value or lack of value to the organization in hiring older workers. Ask the R to be specific, rather than just that they cost more or are more difficult to handle. In what ways are older workers a problem?

Q20. If the title is not self-explanatory, ask for a brief description of what the organization does.

Q21. In this item we are looking for a general classification of size, rather than a specific number. Read the categories to the R.

This item refers to the general size of the entire organization, at all locations, even if the DHR is only responsible for a specific location.

Q22. These items refer to the practices prevalent at the specific location where the DHR has jurisdiction. We want to know which alternative work structures are used at the job location where the DHR does the hiring.

Q22a. Phased in retirement refers to easing into retirement gradually by reducing the hours or work load over a period of time. An example might be reducing the work load from 5-4-3 days a week as one approaches retirement age.

22b. Job sharing refers to one or more individuals sharing job duties and tasks, and being paid half or third wages, according to how the job is divided.

22c. Job redesign refers to allowing the employee to actively shape the way he/she does the job is done. For example, an older worker is allowed to change the physical conditions of a work station in order to be more comfortable or efficient. It also refers to allowing alternative approaches to getting the job done.

22d. Reduced work week means a shorter work week, accomplished by having longer days, for instance, working 40 hours in 4 days.

22e. Flex time is defined as having employees come to work at various times of the day, not necessarily everybody at the same time.

22f. Flex place means that workers have some choice in where they work, including at home.

Have the R describe any other alternative work structures specifically, not just name them.

Q23. The items in questions 23-26 ask for specific information.

Q27. When asking for a description, the R can either give brief words or tell an anecdote or story. Write down as much as possible, even if it repeats some of the information previously noted. Use the R's words.

Q28. Exact information is important here because this information is essential for the supervisor survey. It is possible that the DHR will refer the interviewer to a secretary or assistant.

If the DHR and supervisor are the same person, as will probably be the case in a small company, ask for a convenient follow-up time for another interview. Indicate to R that this will probably be in another month.

**DIRECT SUPERVISOR SURVEY**

1/18/91

Hello. May I please speak to \_\_\_\_\_ . I'm \_\_\_\_\_ from the University of Southern Maine. We are interested in your experiences with older workers in your company. Your cooperation will help employers and other organizations to understand how older workers best succeed in a variety of employment situations.

The answers you give are completely confidential and will not be used in any way that associates them with your name. It will be impossible to tell who said what to each question.

I would also like you to know that I am reading this to you off a computerized questionnaire.

SCREENING QUESTION - First, are you currently supervising a worker, aged 50 years or older, who has been hired since January 1988?

YES ----->GO TO INTRO I

NO ----->ASK NEXT SCREENING QUESTION

SCREENING QUESTION - Have you supervised an older worker in the past six months who has been hired since January 1988?

YES----->GO TO INTRO I

NO----->THANK R AND TERMINATE INTERVIEW

INTRO I

Now, I am going to ask you about a particular older worker as you answer these questions. Can you please list the first names of 3 individual older workers hired since January of 1988 which you are presently supervising or have supervised in the past six months? If you are supervising less than 3 older workers, can you please list their first names?

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

**INTERVIEWER NOTE: PLEASE CHANGE Q TO PAST TENSE WHEN OLDER WORKER IS NO LONGER SUPERVISED BY R**



I will randomly choose one name for you to keep in mind as you answer this questionnaire.

1. Thinking about \_\_\_\_\_, please tell me if you strongly agree, agree, disagree or strongly disagree with the following statements about \_\_\_\_\_.
  - 1a. He/she is willing to learn new procedures and technologies when they are introduced in the workplace. Do you strongly agree, agree, disagree, or strongly disagree?
    - 1 STRONGLY AGREE
    - 2 AGREE
    - 3 DISAGREE
    - 4 STRONGLY DISAGREE
    - 5 DK
    - 6 NA
  - 1b. He/she is creative in solving problems on the job. Do you strongly agree, agree, disagree, or strongly disagree?
    - 1 STRONGLY AGREE
    - 2 AGREE
    - 3 DISAGREE
    - 4 STRONGLY DISAGREE
    - 5 DK
    - 6 NA
  - 1c. He/she shows an aggressive or competitive spirit in his/her work. Do you strongly agree, agree, disagree, or strongly disagree?
    - 1 STRONGLY AGREE
    - 2 AGREE
    - 3 DISAGREE
    - 4 STRONGLY DISAGREE
    - 5 DK
    - 6 NA
  - 1d. He/she is committed to his/her job? Do you strongly agree, agree, disagree, or strongly disagree?
    - 1 STRONGLY AGREE
    - 2 AGREE
    - 3 DISAGREE
    - 4 STRONGLY DISAGREE
    - 5 DK
    - 6 NA

- 1e. He/she displays a good attitude toward his/her job. Do you strongly agree, agree, disagree, or strongly disagree?  
1 STRONGLY AGREE  
2 AGREE  
3 DISAGREE  
4 STRONGLY DISAGREE  
5 DK  
6 NA
- 1f. \_\_\_\_\_ gets along well with his/her coworkers. Do you strongly agree, agree, disagree, or strongly disagree?  
1 STRONGLY AGREE  
2 AGREE  
3 DISAGREE  
4 STRONGLY DISAGREE  
5 DK  
6 NA
- 1g. \_\_\_\_\_ is loyal and dedicated to the organization. Do you strongly agree, agree, disagree, or strongly disagree?  
1 STRONGLY AGREE  
2 AGREE  
3 DISAGREE  
4 STRONGLY DISAGREE  
5 DK  
6 NA
- 1h. \_\_\_\_\_ has the physical stamina or energy level needed to function well in his/her job. Do you strongly agree, agree, disagree, or strongly disagree?  
1 STRONGLY AGREE  
2 AGREE  
3 DISAGREE  
4 STRONGLY DISAGREE  
5 DK  
6 NA
- 2a. Are there any differences between the characteristics which \_\_\_\_\_ brings to the job as an older worker, and those which a younger worker whom you might supervise brings to the job?  
1 YES  
2 NO  
3 DK  
4 NA  
INAP NO YOUNGER WORKERS

2b. What are those characteristics?

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3. For the following series of questions concerning job performance, please tell me if you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied.

3a. How satisfied are you with the amount of supervision that \_\_\_\_\_ needs in order for him/her to get the job done. Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?

- 1 VERY SATISFIED
- 2 SOMEWHAT SATISFIED
- 3 SOMEWHAT DISSATISFIED
- 4 VERY DISSATISFIED
- 5 DK
- 6 NA

3b. How satisfied are you with \_\_\_\_\_'s willingness to work overtime even when it is not required of him/her. Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?

- 1 VERY SATISFIED
- 2 SOMEWHAT SATISFIED
- 3 SOMEWHAT DISSATISFIED
- 4 VERY DISSATISFIED
- 5 DK
- 6 NA

3c. How satisfied are you with \_\_\_\_\_'s willingness to perform tasks not specifically in his/her job description. Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?

- 1 VERY SATISFIED
- 2 SOMEWHAT SATISFIED
- 3 SOMEWHAT DISSATISFIED
- 4 VERY DISSATISFIED
- 5 DK
- 6 NA

- 3d. How satisfied are you with the way \_\_\_\_\_ follows your instructions? Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?
- 1 VERY SATISFIED
  - 2 SOMEWHAT SATISFIED
  - 3 SOMEWHAT DISSATISFIED
  - 4 VERY DISSATISFIED
  - 5 DK
  - 6 NA
- 3e. How satisfied are you with the way \_\_\_\_\_ meets deadlines? Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?
- 1 VERY SATISFIED
  - 2 SOMEWHAT SATISFIED
  - 3 SOMEWHAT DISSATISFIED
  - 4 VERY DISSATISFIED
  - 5 DK
  - 6 NA
- 3f. How satisfied are you with \_\_\_\_\_'s attendance record on the job? Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very satisfied?
- 1 VERY SATISFIED
  - 2 SOMEWHAT SATISFIED
  - 3 SOMEWHAT DISSATISFIED
  - 4 VERY DISSATISFIED
  - 5 DK
  - 6 NA
- 3g. How satisfied are you with your ability to count on \_\_\_\_\_ in a crisis? Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very satisfied?
- 1 VERY SATISFIED
  - 2 SOMEWHAT SATISFIED
  - 3 SOMEWHAT DISSATISFIED
  - 4 VERY DISSATISFIED
  - 5 DK
  - 6 NA

3h. How satisfied are you with \_\_\_\_\_'s skill in communicating on the job? Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very satisfied?

- 1 VERY SATISFIED
- 2 SOMEWHAT SATISFIED
- 3 SOMEWHAT DISSATISFIED
- 4 VERY DISSATISFIED
- 5 DK
- 6 NA

4a. Overall, how satisfied are you with \_\_\_\_\_'s performance in this job? Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very satisfied?

- 1 VERY SATISFIED
- 2 SOMEWHAT SATISFIED
- 3 SOMEWHAT DISSATISFIED
- 4 VERY DISSATISFIED
- 5 DK
- 6 NA

4b. Why are you \_\_\_\_\_ with his/her performance?

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5a. Have you observed any differences between the job performance of \_\_\_\_\_ and the younger workers under 50 years old whom you supervise?

- 1 YES
- 2 NO
- 3 DK
- 4 NA

5b. What are the differences between them?

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6. Can you briefly describe \_\_\_\_\_'s attitude toward work?

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INTRO II

Now I would like to ask you several questions about \_\_\_\_\_.

7. How old is \_\_\_\_\_?  
\_\_\_\_\_ years
8. What race do you consider \_\_\_\_\_ to be?  
1 WHITE  
2 BLACK/AFRO-AMERICAN  
3 ASIAN/ORIENTAL  
4 NATIVE AMERICAN  
5 HISPANIC  
6 OTHER (PLEASE SPECIFY \_\_\_\_\_)  
7 DK  
8 NA
9. Is he/she married?  
1 YES  
2 NO  
3 DK  
4 NA
10. What is his/her educational level?  
1 LESS THAN EIGHTH GRADE  
2 EIGHTH GRADE  
3 NINTH - ELEVENTH GRADE  
4 HIGH SCHOOL OR GED  
5 VOCATIONAL OR OTHER NON-COLLEGE POSTSECONDARY TRAINING  
6 ONE -THREE YEARS OF COLLEGE/ASSOCIATE DEGREE  
7 GRADUATED FROM COLLEGE OR HIGHER  
8 DK  
9 NA
11. What is \_\_\_\_\_'s wage or salary?

**INTERVIEWER NOTE: PLEASE NOTE THE UNIT OF TIME (SUCH AS HOUR, WEEK, MONTH OR YEAR) WHEN RECORDING SALARY OR WAGE**

12. Does he/she have any family members who rely on him/her for physical care and assistance?

1 YES----->GO TO Q13

NO ----->GO TO Q14

DK ----->GO TO Q14

NA ----->GC TO Q14

13. In what ways, if any, has this caregiving role effected \_\_\_\_\_'s job attendance or performance?

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14. From your observation, how would you describe \_\_\_\_\_'s overall health? Would you say it is excellent, good, fair or poor?

1 EXCELLENT

2 GOOD

3 FAIR

4 POOR

5 DK

6 NA

15a. Does \_\_\_\_\_ have a health or physical problem which limits the kind or amount of work he/she can do?

1 YES

2 NO ----->GO TO INTRO III

3 DK ----->GO TO INTRO III

4 NA ----->GO TO INTRO III

15b. How does it limit the kind or amount of work he/she can do?

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### INTRO III

The following questions are about the job which \_\_\_\_\_ performs for your organization.

16. What is \_\_\_\_\_'s job title or what sort of work does he/she do on his/her job?

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17. Tell me a little more about what he/she does on his/her job?

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18. Is \_\_\_\_\_'s job a full or part-time job?

1 PART TIME

2 FULL TIME

3 DK

4 NA

19. How many hours per week does \_\_\_\_\_ work?

\_\_\_\_\_ # of hours

20. Would you consider \_\_\_\_\_'s job to be a seasonal or temporary job?

1 YES

2 NO

3 DK

4 NA

21. Thinking about \_\_\_\_\_'s job, please tell me if you strongly agree, agree, disagree or strongly disagree with the following statements about his/her job.

21a. His/her job requires that he/she keeps learning new things. Do you strongly agree, agree, disagree, or strongly disagree?

1 STRONGLY AGREE

2 AGREE

3 DISAGREE

4 STRONGLY DISAGREE

5 DK

6 NA

21b. He/she has the freedom to make decisions about how he/she goes about doing his/her job. Do you strongly agree, agree, disagree, or strongly disagree?

1 STRONGLY AGREE

2 AGREE

3 DISAGREE

4 STRONGLY DISAGREE

5 DK

6 NA



- 21c. In general, his/her job requires a high level of experience and skill. Do you strongly agree, agree, disagree, or strongly disagree?
- 1 STRONGLY AGREE
  - 2 AGREE
  - 3 DISAGREE
  - 4 STRONGLY DISAGREE
  - 5 DK
  - 6 NK
- 21d. His/her job requires familiarity with computers and other technologies. Do you strongly agree, agree, disagree, or strongly disagree?
- 1 STRONGLY AGREE
  - 2 AGREE
  - 3 DISAGREE
  - 4 STRONGLY DISAGREE
  - 5 DK
  - 6 NK
- 21e. His/her job requires well-developed writing skills. Do you strongly agree, agree, disagree, or strongly disagree?
- 1 STRONGLY AGREE
  - 2 AGREE
  - 3 DISAGREE
  - 4 STRONGLY DISAGREE
  - 5 DK
  - 6 NK
- 21f. His/her job requires skill in communicating with customers and other members of the public. Do you strongly agree, agree, disagree, or strongly disagree?
- 1 STRONGLY AGREE
  - 2 AGREE
  - 3 DISAGREE
  - 4 STRONGLY DISAGREE
  - 5 DK
  - 6 NK
- 21g. His/her job requires \_\_\_\_\_ to work extra hours at times. Do you strongly agree, agree, disagree, or strongly disagree?
- 1 STRONGLY AGREE
  - 2 AGREE
  - 3 DISAGREE
  - 4 STRONGLY DISAGREE
  - 5 DK
  - 6 NK

21h. His/her job requires that \_\_\_\_\_ travel regularly. Do you strongly agree, agree, disagree, or strongly disagree?

- 1 STRONGLY AGREE
- 2 AGREE
- 3 DISAGREE
- 4 STRONGLY DISAGREE
- 5 DK
- 6 NK

21i. His/her job requires \_\_\_\_\_ to perform most tasks alone. Do you strongly agree, agree, disagree, or strongly disagree?

- 1 STRONGLY AGREE
- 2 AGREE
- 3 DISAGREE
- 4 STRONGLY DISAGREE
- 5 DK
- 6 NK

22a. Do you see any particular tasks as more suited to an older worker rather than a younger worker?

- 1 YES
- 2 NO ----->GO TO INTRO IV
- 3 DK ----->GO TO INTRO IV
- 4 NA ----->GO TO INTRO IV

22b. What particular tasks are more suited to older workers?

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#### INTRO IV

Now I would like to ask you several questions about yourself.

23. What is your date of birth?

\_\_\_\_\_  
(MM/DD/YY)

24. How long have you worked for this organization?

\_\_\_\_\_ # OF YEARS \_\_\_\_\_ # OF MONTHS

25. How long have you been a supervisor in this organization?

\_\_\_\_\_ # OF YEARS \_\_\_\_\_ # OF MONTHS

26. What is the last grade in school you have completed so far?

- 1 LESS THAN 12TH
- 2 HIGH SCHOOL OR GED
- 3 TECHNICAL OR VOCATIONAL SCHOOL
- 4 SOME COLLEGE OR ASSOCIATE DEGREE
- 5 COLLEGE GRADUATE
- 6 SOME GRADUATE WORK
- 7 GRADUATE DEGREE
- 8 DK
- 9 NA

27a. Before joining this organization, did you have any experience supervising older workers?

- 1 YES
- 2 NO ----->GO TO Q28
- 3 DK ----->GO TO Q28
- 4 NA ----->GO TO Q28

27b. Please describe your past experience supervising older workers.

\_\_\_\_\_  
\_\_\_\_\_

28. On the average, how many hours a week are dedicated to supervising

\_\_\_\_\_?

\_\_\_\_\_ # of hours

29a. Is this different from the amount of time you give to supervising a younger worker?

- 1 YES
- 2 NO ----->GO TO Q30
- 3 DK ----->GO TO Q30
- 4 NA ----->GO TO Q30
- 5 INAD NO YOUNGER WORKERS ----->GO TO Q30

29b. How is this different?

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30. On the average, how many hours a week do you work?

\_\_\_\_\_ # of hours

31. What are the important supervisory issues you have had with \_\_\_\_\_ since hiring him/her?

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Any others? \_\_\_\_\_

32a. Is your supervisory role with \_\_\_\_\_ different from that with a typical younger worker?

- 1 YES
- 2 NO ----->GO TO Q33
- 3 DK ----->GO TO Q33
- 4 NA ----->GO TO Q33

32b. How is it different?

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33. Thank you very much for your time and for participating in the study. Your answers have been very helpful. Do you have any comments that you would like to add?

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**DIRECT SUPERVISOR SURVEY**  
**QUESTION BY QUESTION OBJECTIVES**

**SCREENING QUESTIONS**

The purpose of this first question is to ensure that the R actually has experience supervising an older worker, aged 50 or older, who was hired by this company since January of 1988.

If the R is not currently supervising someone who meets the criteria, move to the next screening question. If the R has supervised someone who meets the criteria within the last 6 months, continue with the interview.

The R needs to have only a general idea of the age of his/her employees. It is not necessary to check the records. If the R appears resistant or unwilling, ask if there is a better time to call and note that on the cover sheet. Try to be as inclusive as possible when screening Respondents.

For the next introductory question, take down as many names (up to 3) as the R can think of and randomly choose 1. There will be a number chart with the cover sheet, explaining procedures if the R lists 3 names, 2 names, or just 1. Only first names are necessary; this is merely to help the R maintain a frame of reference throughout the interview.

At this point, it might be helpful to remind the R that you will be reading this survey from a computer screen.

There will be an interviewer box here, reminding the interviewer to use the past tense if the employee is no longer with the organization.

- Q1. For this series about the personal characteristics of the older worker, establish the pattern for the R by repeating the choices for the first few questions, until the R seems to understand what the responses are.
- Q1a. This question refers to the employee's readiness to change and adapt to new machinery and working conditions, such as computers, new phone systems, new ways of handling customers.
- Q1b. Here we are looking for the employee's willingness and ability to think of new ideas and responses to problems.

- Q1c. This question asks about the employee's investment of personal energy in the job - does the employee have ambition, want to get ahead?
- Q1d. Some behaviors that might show commitment are: consistency of performance, attempts to improve, loyalty to organization's procedures and policies, punctuality.
- Q1e. We are asking about the supervisor's view of the employee's attitude here. Does the employee show a positive demeanor and outlook concerning the job?
- Q1g. These qualities are similar to commitment. Dedication can be shown in working extra hours, offering suggestions, keeping morale up, willingness to help.
- Q1h. Again, this asks for the supervisor's assessment of the employee's physical stamina. Is the general health of the employee adequate to perform well in the job?
- Q2b. Here we are asking for a comparison between the qualities that this specific older worker brings to the job and those which a younger worker might bring to the job. Although we are talking about a particular older worker in this survey, we want the R to consider the broader influence of age in this comparison.
- Q3. The focus of attention now shifts to job performance. Again, set up the pattern for this series, and then do not repeat it for every question when the R gets into the rhythm.
- Q3a. The R needs to understand that it is his/her level of satisfaction with the amount of supervision needed which is the issue. The supervisor might want more or less supervision of the individual.
- Q3c. This might vary from job to job. Some employees' duties are fairly straightforward, and don't allow for much diversity.
- Q3e. Again, deadlines might not be a part of the individual's responsibilities, but certainly getting forms or responses in on time would come under this heading.
- Q3g. This question refers as much to the R's sense that the employee can be counted on to be responsible or trustworthy as to any experience of an actual crisis on the job.
- Q3h. Here we are interested in all types of communication - with customers, with the general public, with coworkers, on the phone, in person, in writing.
- Q4b. For this question we are seeking the rationale behind the R's judgment, stated in brief terms.

Q5b. Again, we want to know about the supervisor's view of the influence of age on job performance - the performance of an older worker compared to the performance of a younger worker.

INTRO II. It is not necessary for the R to be absolutely certain about the information in this series; a general estimation of the items asked for is sufficient.

Q7. It is possible that the R can only estimate the age of the older worker. "I don't know" is an appropriate answer only after the interviewer has probed for an actual age. Try to get the R to guess at an age.

Q11. Ask the R to give an hourly, weekly, monthly, or annual salary. Record a number figure, as well as a time period.

Q12. Dependents means family members of any age. Care refers to "touch care", also meal preparation.

Q15a. This question differs from the previous one (Q3h) in asking about health/physical problems which impact the job performance of the individual.

INTRO III. These items ask for specifics about the actual job performed by the employee.

Q16. In response to the questions concerning occupations, it is necessary to get very exact information about the job itself. It is usually necessary to write several words to describe an occupation. Be as specific as possible; ask the R for more information if you need it.

The standard format found in most questionnaires (rewritten in 1981) includes automatic probes which help the R and the interviewer to arrive at the clearest, most codeable description of the older worker's occupation.

In order to code an occupation accurately, we must have very detailed information about the type of work in which the older worker is engaged. To obtain this information, you will often have to use very specific probes. For example, if R responds to the "tell more..." question with "I run a machine," you should ask, "What kind of machine is that?" If R says "construction worker", an appropriate probe would be "What are the main duties on your job?" If R just gives duties and responsibilities, probe for job title.

R may tell you the name of the company for which he or she works; do not record the names of businesses or companies in the questionnaire! Not only is this possibly identifying information and therefore a breach of confidentiality, but names are not sufficient for coding.

Since very specific information is needed to code R's occupation accurately, we encourage you to observe the following instructions carefully:

1. Probe for clear, complete answers. We must be able to distinguish among unskilled workers (such as laborers), semi-skilled workers (such as operators), and skilled workers (such as plumbers, electricians).
2. The type of place at which R works is (usually) an insufficient response to occupation questions. For example, if R "works in a bank", he might be a manager, a teller, or a janitor.
3. Avoid vague job titles that may apply to a wide range of occupations. For example, if R says he is "an engineer," that may mean that he: a) designs bridges or airplanes; b) operates a railroad locomotive; c) tends an engine in a power plant; or d) shovels coal into a furnace. A R who says he is "a road construction worker" may be: a) the supervisor of a road gang; b) the operator of a bulldozer; or c) a common laborer. We need more specific information to make the distinction among skilled, semi-skilled, and unskilled occupations.
4. Examples of differentiations necessary at the other end of the occupational scale are: a) whether a "nurse" is a registered nurse(RN) or a licensed practical nurse (LPN) and b) whether a "teacher" is at the college, high school, or elementary school level. Some suggested probes to determine this are "At what level do you teach?" or "What type of school or college do you teach in?"
5. The following job titles are unacceptable without further explanation because they simply do not provide enough information for us to determine accurately R's occupation:
  - factory worker;
  - construction worker;
  - driver (of what?);
  - teacher (grade, type of school?);
  - engineer (what does he/she do on the job?);
  - nurse (RN or LPN?);
  - sailor (officer, enlisted, deckhand...?);
  - manager, supervisor (supervises whom?)
  - salesperson (sells what, wholesale, retail?);
  - clerk (what does R do on the job?);
  - mechanic, repairperson (what does R repair?);
  - apprentice (plumber, electrician...?); or
  - inspector (what does R inspect?).

The type of business or industry in which R works is vital, not only to classify the industry, but to help us code the occupation. For instance, a laborer or a warehouse worker may do different kinds of things, depending on the industry in which he/she works. We need to know: a) whether it is a manufacturing or a selling enterprise; b) what kind of product/service is manufactured/provided.



In the case of a sales business, ask whether the trade is wholesale or retail. For instance, if R is a salesperson, find out whether he/she is engaged in wholesale or retail trade and what he/she sells.

The following clues will help you know what kinds of probes to use to get codeable information about occupation.

1. When something is constructed: is it buildings; bridges; highways...?
2. Utilities: is it electric light and power; water; electric-gas; gas and steam; telephone?
3. If the R is employed by the government, specify the department: Parks and Recreation, Sanitation, etc.
4. Government level: federal; state; local?
5. Medical clinics: hospital clinic; private doctor's?
6. Nurses: RN; LPN?
7. If a person operates a machine, specify kind of machine.
8. Machinist is a specialized occupation and is not the same as a machine operator. Be aware of this, since many people use the terms interchangeably.
9. School level: specify grade for elementary and secondary teachers and subject for college.
10. School type: vocational; high school; college?
11. Organizations: profit; nonprofit?
12. Processes used to make metal products: cast; stamped metal; fabricated?
13. Foundries (material produced): brass; bronze; steel; iron?
14. Canneries: specify kind of food - fish; fruit; milk?
15. Babysitter: done in the R's own home or someone else's home?
16. Engines: diesel; steam; turbine?

17. Motors: aircraft; electric; outboard; rocket?
18. Textiles: yarn; fabric; finished garments?
19. Clothing manufacturer: knit; cotton; wool; silk?
20. Shoes: leather; canvas; orthopedic; rubber-sole?
21. When the occupation is the armed forces, try to get the R's rank. If this is not possible, please try to find out whether the person is or was commissioned, non-commissioned, or enlisted. Keep in mind that civilians are also employed by the armed forces.
22. Mining: mining materials can be categorized as metal, coal, crude petroleum, or natural gas. Please ask the type of material mined: copper ore; borax; aluminum; gravel; crude oil; tin; petroleum; natural gas?
23. Oil: many types of oil industries. Ask the R to specify the type of business: oil field company (extraction); oil lease buyer; oil distributor; oil station (retail); oil royalty dealer; oil storage tankers?
24. Heavy equipment or heavy machinery: farm; construction?
25. Engineer: chemical; civil; industrial; petroleum; electrical; locomotive?
26. Restaurant: chain; hotel; country club; nonprofit?
27. Manager or supervisor: what are the job duties of the people R supervises or manages - sales, data processing?

Q17. Try to get the R to list tasks, duties, functions in behavioral terms.

Q21. The remaining items in this series asks the R to choose from a range of agree statements. Set up the pattern for the R with the first few items; after that it is not necessary to repeat the responses for every question.

Q21b. This item may not apply to all jobs.

Q21c. This question asks about the level of professional expertise that the job requires.

Q21d. This question does not ask about competency or specialization in technology, just general familiarity.

Q21e. Again, this item may not apply to all jobs.

Q21f. We are referring to all types of communication with the public here - by phone or in person.

Q22b. We are asking the R to think through his/her thought process in hiring an older worker for a particular job.

INTRO IV. The last series of questions asks for specific information about the R.

Q24. Fill in both years and months, if possible.

Q25. Fill in both years and months, if possible. We are asking about all the years of supervisory experience in this organization, not just the current position.

Q27b. Ask the R to describe the experience in brief terms.

Q28. We are looking for the average number of hours a week dedicated to supervising.

Q30. This item refers to the hours the R devotes to all the tasks of his/her job, not just those relating to the employee.

Q31. This question asks about both positive and negative issues in supervising the older worker.

Q32b. If the R has answered yes to this question, ask him/her to describe the difference in brief terms.

**EMPLOYERS VIEWS OF OLDER WORKERS PROJECT  
DIRECT SUPERVISOR SURVEY**

**ADDITION TO QUESTION BY QUESTION OBJECTIVES**

EXAMPLES TO BE USED IF NEEDED

- 1b. Employee's willingness and ability to think of new ideas and responses to problems:  
in small matters - finding supplies, sharpening pencil;  
in large matters - breakdown of machinery, phone system inoperative.
- 3e. Employee meets deadlines:  
gets insurance form in on time;  
gets back from break on time.
- 3g. Ability to count on employee in a crisis:  
if supervisor is unavailable, employee can step in and function  
without supervision;  
the employee is flexible enough to handle a new situation appropriately.
- 12. Dependents: refer to people of any age.  
Caregiving: means actual physical care, including meal preparation.

5/28/91

**EMPLOYERS' VIEWS ON THE VALUE OF OLDER WORKERS**

Site Visit Interview Questions  
"Generic Questions"

- 1.a. How would you describe the ability of newly hired older workers in your organization to adapt to new technologies in the workplace?
- 1.b. Does the age of a new employee make a difference in their training needs? Are older workers more or less difficult to train than younger workers?

2. Within the broad range of older workers (50+) do you have different motivations to hire workers in their 50s compared to post-retirement age (62+ or 65+)? Is there any connection to the type of job that affects your motivations?

3. Do you find a flexibility gap between what your organization wants in an employee, and the desires of older job applicants?

4. The "freedom factor" -- how important is the distance and latitude of supervision for potential older workers in your organization? Do you value workers who need not be closely supervised and who want more control over their jobs? Are older employees more likely to show these tendencies?

5. Liabilities of hiring OWs -- are issues such as general health, turnover due to anticipated re-retirement or death considered when you interview older applicants? Other "costs" to your organization?

6. Do you think about the possible value of an intergenerational work force at your organization?

7. How do you react to the intrinsic/extrinsic distinction we found in our previous study? Do you weigh either of these more when hiring older workers?



8. Have you re-examined your own beliefs about hiring or supervising older workers based on your participation in our study?

SPECIFIC QUESTIONS

1. How is the ( ) industry different from others that might affect how you value potential older workers?

**APPENDIX E - LEVEL OF EFFORT**

Responses to Mailing -DHR Survey

Level of Effort - DHR Calls - Completed and Other Disposition

Level of Effort - Supervisor Survey - Calls - Completed and Other Disposition

**MAILINGS - EMPLOYERS' VIEWS OF OLDER WORKERS PROJECT**

**DIRECTOR OF HUMAN RESOURCES SURVEY**

Total completions all three states - 105

Total ineligible, refused, terminated, not applicable because of seasonal work - 19

**Maine**

Date Mailed	Mailed To:	# Mailed	Yes	No	Not Deliverable	Completion s	Ineligible*
8/27/90 (100s)	Former Survey Participants	52	29	8	2	23	
9/26/90	Follow-up	25					
11/8/90 (500s)	Sample -Bangor Personnel Assoc. Members	21	12	1	0	15	
12/5/90	Follow-up	13					
1/24/91(600s)	Sample-ME Chamber Commerce/Industry #1	60	9	10	1	8	
2/13/91 (700s)	Sample-ME Chamber Commerce/Industry #2	42	5	4		4	
<b>TOTALS</b>		<b>213</b>	<b>55</b>	<b>23</b>	<b>3</b>	<b>52</b>	<b>9**</b>

**New Hampshire**

Date Mailed	Mailed To:	# Mailed	Yes	No	Not Deliverable	Completions	Ineligible*
9/5/90 (200s)	Referred Participants	51	24	7	1	20	
10/9/90	Follow-up	34					
9/19/90 (400s)	Random Sample -NH 100 Largest Manufacturing Cos	33	7	11	1	4	
10/19/90	Follow-up	23					
<b>TOTALS</b>		<b>141</b>	<b>31</b>	<b>18</b>	<b>2</b>	<b>25</b>	<b>5**</b>

\*Includes those who were not eligible, refused or terminated

Connecticut

Date Mailed	Mailed To:	# Mailed	Yes	No	Not Deliverable	Completion s	Ineligible*
9/5/90 (300s)	Former Survey Participants	64	33	20	1	27	
10/19/90	Follow-up	51					
TOTALS		115	33	20	1	28	3**

\*Includes those who were not eligible, refused or terminated

**DIRECT SUPERVISOR SURVEY**

Total Postcards Mailed - 122, including 20 pool postcards

Total Surveys Completed - 113

**LEVEL OF EFFORT  
 DIRECTOR OF HUMAN RESOURCES SURVEY  
 EMPLOYERS' VIEWS OF OLDER WORKERS PROJECT  
 CALLS - COMPLETED AND OTHER DISPOSITION**

Calls	Call Backs	Ineligible	Refused	No Answer	No List/Not in Service	Wrong Number	Busy	Answering Machine	Seasonal (NA)
<b>TOTAL CALLS - THREE STATES</b>									
105	150	12	5	12	1	4	21	9	1
<b>MAINE CALLS</b>									
52	77	8	1	5	1	2	5	7	0
<b>NEW HAMPSHIRE CALLS</b>									
25	43	3	1	1	0	1	9	1	0
<b>CONNECTICUT CALLS</b>									
28	30	1	3	6	0	1	7	1	1

EMPLOYERS' VIEWS OF OLDER WORKERS PROJECT

LEVEL OF EFFORT  
DIRECT SUPERVISOR SURVEY

CALLS - COMPLETED AND OTHER DISPOSITION

Calls Completed	Call Backs	Ineligible	Refused	No Answer	No List /Not in Service	Wrong Number	Busy	Answering Machine	Terminated	Only Supervisor Unavailable	Not Completed Sample Size Attained
<b>TOTAL CALLS - THREE STATES</b>											
113	302	14	1	52	1	7	81	26	2	1	4
<b>MAINE CALLS</b>											
100s 25	159	6	1	16	0	3	17	19	1	1	1
500s 17											
600s 9											
700s 5											
56											
<b>NEW HAMPSHIRE CALLS</b>											
200s 22	56	3	0	25	0	4	30	2	0	0	1
400s 5											
27											
<b>CONNECTICUT CALLS</b>											
300s 30	87	5	0	11	1	0	34	5	1	0	2