1

The OWLS Are Here

I walked away from the corporate world at 57 . . . spent two happy years traveling, sailing, and volunteering . . . earned a second Master's degree in Human Resource Development at 59 while consulting with one of industry's best employers of mature workers. At 64 I'm still consulting and showing HRD departments how to capture the spirit of the mature worker and maximize the mature worker's potential. I love what I'm doing and don't anticipate retiring as long as my health remains constant . . . I just enjoy life and learning new things . . . I often wonder what I'll be doing when I'm 80.

Kenneth, age sixty-four, senior consultant

OLDER WORKER-LEARNERS (OWLS) like Kenneth are here—and they're here to stay. At age sixty-four, he is on the cusp of two demographic groups: (1) the age sixty-five-plus group, which is becoming the fastest-growing segment of the U.S. workforce and will steadily increase through 2030, and (2) the age twenty through sixty-four group, which is predicted to steadily decline through 2030 (Allier & Kolosh, 2005; *Reimagining America,* 2005). This puts Kenneth right in the middle of two major

workplace trends—the aging or graying of the workplace and the demographic shift that will disturb the balance of the global workforce.

This chapter will discuss these two trends and establish the age span of the OWLS who are at the heart of the trends. The chapter will also suggest how workplace learning and performance (WLP) practitioners can use their competencies as analysts and change agents to assess the aging of their workplaces and make recommendations for action.

Workplace Trends

It is the same throughout the working world. The global workplace is aging and demographics are shifting. OWLS are getting younger—and older. And they are an integral part of a workplace that is undergoing other dramatic changes as well. We know of the growing use of information technology; offshoring, outsourcing, and rightsizing; contingent employment; performance pressures; life and work balance, and other pressing issues. Trends like these will continue to define work in the future (O'Toole & Lawler III, 2006).

The Global Workplace Is Aging

The total number of OWLS in the U.S. workplace began to rise around 1990 (Callahan, Kiker, & Cross, 2003); nine years later the *Monthly Labor Review* reported that over forty million OWLS were actively participating in the workforce, an increase from 1990 of 30 percent (Fullerton, 1999). Looking into the future, the U.S. Department of Labor predicts that 51 percent of the U.S. workforce in 2010 will be OWLS ("Labor Force Predictions," 2004), and the *Monthly Labor Review* forecasts that the number of OWLS will rise to nearly seventy million by 2015 (Fullerton, 1999).

The aging of the workforce is not limited to the United States. Literature from and about European and Asia Pacific workforces reports a similar increase of OWLS (Leven, 2004; Lesser, Farrell, & Payne, 2004; "Briefing Sheet," 2005; Lesser, Hausmann, & Feuerpeil, 2005). Currently, in most European Union (EU) countries the number of OWLS is relatively small; however, EU

governments have agreed to introduce laws, regulations, and policies to encourage

- OWLS to stay in, enter, or reenter the workplace
- Organizations to introduce policies that "enhance the position and chances of older workers" and help OWLS "stay healthy, productive, motivated, and involved" (*Age,* 2006, n.p.)

In Asia, China will begin to see an aging workforce around 2040 and South Korea will encounter an aging workforce by 2050 (Lesser, Farrell, & Payne, 2004). The governments of South Korea and Japan are both anticipating their aging workforce and establishing legislation and policies to encourage OWLS to stay in the workplace.

However, there is more than just aging going on. Global demographers are predicting a concurrent demographic shift from a balanced workforce of older and younger workers to an imbalanced workplace in which OWLS predominate. For example, half of Japan's population is over age 41. According to Charles Leven, Chair of the AARP Board of Directors: "I am told it is Japan's destiny to have the oldest, working-age population of any member country of the Organization for Economic Cooperation and Development (OECD)" (Leven, 2004, n.p.).

Demographics Are Shifting

The results of shifting demographics will be felt in the workplace of industrialized nations throughout the world, including Asia-Pacific, Canada, Europe, and the United States. For example, over the next two decades the fifty-through-sixty-four age group of European Union (EU) workers will *increase* by 25 percent, whereas the twenty-through-twenty-nine age group will *decrease* by 20 percent (Lesser, Farrell, & Payne, 2004). In the United States, the Employment Policy Foundation predicts that when the baby boomers begin to turn age sixty-five in 2011, available jobs could outnumber available workers by 4.3 million (Hall, 2005). As the number of people in the age sixty-five-plus population increases, the number of people in the

age twenty-through-sixty-four population will decline, and there will be fewer U.S. workers to replace those who are retiring.

Business, industry, and service sectors with a large proportion of OWLS will be particularly affected by the shifting demographics. The manufacturing sector estimates it may need as many as ten million new skilled workers by 2020, "partially to replace aging workers who represent a large portion of the 14 million people currently employed in the sector" (Maher, 2005). The oil and utilities industries also anticipate problems filling the vacancies anticipated from massive retirements.

In the government sector, the U.S. Library of Congress employs four thousand people and is considered to have a mature workforce; for example, "70 percent of its librarians (the single largest group of its employees) are age 50 or older" (Joyce, 2005). The Library could need to replace more than half of its librarians within the next fifteen years.

To compound the problem, another demographic shift is occurring—a shift in the age span of OWLS. Once upon a time people became OWLS in their sixties. Then the social phenomenon called *the culture of youth* occurred and OWLS became younger . . . and older.

OWLS Are Getting Younger . . . and Older

When we first began to research this book we thought OWLS were men and women age fifty through seventy who actively participate in the workforce as workers and learners. Then we read Hale's 1990 book *The Older Worker.* Hale defined *older* as fifty through seventy*;* however, she also admitted: "There is widespread variation in how *older* is defined in law, theories, surveys, studies, and the popular press and media. *Older* can be a label attached to anyone from forty to seventy and beyond" (p. 2). And that started our quest for the real age span of OWLS.

The more we read, the more we expanded our thinking, until we finally settled on an age span of forty and older. This age span encompasses those both younger and older than in our original assessment. Research on life and workplace trends, the normal aging process, and the influence of perceptions

from the workplace all confirm that the age span of OWLS is expanding—OWLS are getting younger and older.

OWLS Are Getting Younger

There is no consensus in the global literature regarding when a worker-learner becomes an OWL; however, there is a general consensus that OWLS are getting younger. In the United States, the American Association of Retired Persons (AARP) 2002 national survey on work and careers included workers age forty-five (*Staying Ahead of the Curve,* 2002); the U.S. Department of Labor labels worker as *old* at age forty-five; and the U.S. Congress states that age discrimination laws are applicable at age forty.

In the United Kingdom (UK), Metcalf and Thompson (1990) and Arrowsmith & McGoldrick (1996) found that many managers consider forty-year-old workers as *older,* and a few managers even responded that thirty-year-old workers are older.

Some of the literature speculates as to *why* OWLS are getting younger. Mostly it is a matter of perception—impressions, attitudes, or understandings based on observation or thought that may or may not be true. For example, Stein & Rocco (2001) suggest that U.S. workers are perceived as OWLS at age forty because that is when they begin to think about retirement and organizations begin to view them as less productive and more useful as mentors to younger workers. The perception is that job skills peak and then plateau or decline at age forty; yet, for many OWLS, skills and interests just keep expanding.

Arrowsmith & McGoldrick (1996) suggest that the UK managers who think OWLS become OWLS at age thirty or forty may have been influenced by the workers' attitude toward life. The authors do not specify which attitudes are indicative of older workers; however, Chapters Two and Four of this book discuss some common attitudes and characteristics that the workplace attributes to OWLS as workers and learners.

Perceptions of being *older* may also be triggered by the normal age-related physical changes that begin around age forty. A worker *may* begin to show wrinkles and gray hair. Changes in vision, hearing, and so forth *may* begin to

affect how the worker learns or performs. However, improvements in health, nutrition, and overall physical and mental well-being *may* also diminish or postpone the effects of physical aging and help to explain why OWLS are getting older (see Chapter Eight).

OWLS Are Getting Older

There is less controversy surrounding the upper groups of OWLS. AARP's survey *Staying Ahead of the Curve* (2002) surveyed OWLS as old as age seventy-four—well beyond the traditional retirement age of sixty-five. *Experience Works,* a national organization that supports and honors older workers, reports that more and more OWLS age eighty to one hundred-plus are actively participating in the U.S. workplace, and many of them are full-time OWLS ("The Search Is On," 2006). From a global perspective, an increasing number of Japanese men and women are working until they are age ninety to one hundred (Watanabe, 2005).

The reasons why OWLS are getting older are more of a reality than a perception. We have already mentioned that life trends toward better health, increased fitness levels, and longer life expectancy extend both the length of time an OWL can live—the lifespan—and the length of time an OWL can be able to work—the workspan. Workplace trends such as the shift from physical to nonphysical job demands (see Chapter Two) and the need to retain or rehire older workers also allow OWLS to stay active in the workforce beyond the traditional retirement age. Workplace accommodations such as flexible work schedules, telecommuting, and consulting opportunities can extend the working life of OWLS indefinitely.

OWLS Span Five Age Groups

There are more than sixty years of separation between younger and older OWLS. The forty-plus span we have discussed previously is so broad that the picture is out of focus unless we break down the age span into smaller age groups. We decided to use traditional descriptive terms found in the research literature (Neugarten, 1936; Neikrug, Ronen, & Glanz, 1995) to help us categorize the age span of OWLS:

Young OWLS—age forty through fifty-four

Mid-Old OWLS—age fifty-five through sixty-four

Old OWLS—age sixty-five through seventy-four

Old-Old OWLS—seventy-five through eighty-four

Oldest OWLS—eighty-five-plus

Table 1.1 presents a statistical snapshot of Young to Oldest OWLS here in the United States. There were some slight differences between the age spans we use in our categories and the age spans used in the various studies. We have only reported statistics that begin with the age group or do not deviate more than one or two years from the age group.

Table 1.1. OWLS Here and There—A Global Snapshot.

OWL Age Span	U.S. Workplace Statistics
Young OWLS Age forty through fifty-four	There were approximately forty million Young OWLS in the workplace in 2002 (U.S. Bureau of Labor Statistics, 2002).
Mid-Old OWLS Age fifty-five through sixty-four	There were 18.8 million Mid-Old OWLS in the U.S. in 2002 (U.S. Bureau of Labor Statistics, 2002). The Social Security Administration reports that OWLS age fifty-five-plus are the fastest-growing segment of the U.S. working population and will remain the predominant segment through 2010 (Allier & Kolosh, 2005; *Staying Ahead of the Curve,* 2002; "Turning Boomers into Boomerangs," 2006).

(Continued)

Table 1.1. OWLS Here and There—A Global Snapshot, *Continued.*

OWL Age Span	U.S. Workplace Statistics
Old OWLS Age sixty-five through seventy-four	There were 3.3 million Old OWLS in 2002 (U.S. Bureau of Labor Statistics, 2002). OWLS age sixty-five-plus will become the fastest-growing segment from 2010 to 2030: they will increase from thirty-nine million to seventy million (Allier & Kolosh, 2005; Wellner, 2002).
Old-Old OWLS Age seventy-five through eighty-four	Seventy percent of men seventy-five-plus are supporting themselves and their spouses (Atchley, 1991).
Oldest OWLS Age eighty-five-plus	There were nearly a million Oldest OWLS in 2002 (U.S. Bureau of Labor Statistics, 2002). All of the past *America's Oldest Worker Award* winners have been 100 years or older and working almost full time ("The Search Is On," 2006).

The largest segment of the global OWL population is currently age fifty-five-plus. In 2015, the demographics will shift slightly. As Young Owls become Old OWLS, the largest, fastest-growing group of OWLS will be age sixty-five-plus. The sixty-five-plus group will continue to grow through 2030.

Implications for Workplace Learning and Performance

WLP practitioners and their organizations need to accept that "demography is destiny when it comes to improving workplace learning and performance" (Woodwell, 2004, p. 9). Whether OWLS are forty or one hundred, Young, Oldest, or in between, they are working and will continue to work well into the twenty-first century. The very presence of large numbers of OWLS challenges existing workplace learning and performance policies, procedures, and practices. The fact that OWLS may be irreplaceable adds to the challenge.

Organizations need to recognize how shifting demographics may affect their success and survival. They need to adapt to a potential imbalance between younger and older workers. They need to look at the demographics and turn a challenge into an opportunity. If current demographic patterns persist, there will be more OWLS in the workplace and fewer younger workers available to replace the OWLS who do retire or to meet increased customer needs for products or services. Researchers such as Aaron, Bosworth, and Burtless (1989) and Johnson (2004) suggest that increasing employment among older adults could relieve the demographic pressures in the workplace; however, it takes a combination of awareness and action to maximize the learning and performance potential of OWLS in the workplace. The *ASTD Trends Watch* also suggests that organizations should hire more OWLS, work hard at retaining OWLS, and expand education and training efforts to meet the needs of OWLS—especially their need for continuing training in new technologies: ". . . success in the knowledge economy will depend to an unprecedented degree on workers' skills and their willingness to learn, not on whether they are young or old, male or female, black or white" (Woodwell, 2004, p. 21).

Finding the key to successful hiring, retention, and training of OWLS is not easy. OWLS "defy stereotyping" (Roberson, 2003, p. 5). The large age span of OWLS—sixty years or four generations—makes it almost impossible to establish "OWLness"; yet WLP practitioners need to become aware of the

totality of OWLness and how to adapt workplace learning and performance initiatives to OWLS of all ages and stages.

The Key: Awareness+Action

To make the most of the aging workplace, organizations need to be aware of the degree to which their specific workplace is influenced by the presence of OWLS and to actively pursue learning and performance interventions as required. On a global level, the EU and countries like Japan and South Korea are currently funding projects to create jobs, training, and wage support for OWLS over the next decade (Lesser, Farrell, & Payne, 2004). In the United States, a 2002 survey by DBM, a global human resources firm, found that 61 percent of the companies were aware of the demographic shift; however, only 45 percent were actively strategizing how to retain, hire or rehire, or train or retrain OWLS (McIntire, 2005).

A 2003 study by the Society of Human Resource Management (SHRM), National Older Worker Career Center (NOWCC), and Center for Economic Development (CED) also found that while 28 percent of large U.S. employers in the study planned to set up programs to attract and retrain OWLS, less than 50 percent provided training to upgrade the skills of OWLS (*SHRM Trends,* 2003). WLP practitioners are in a unique position to help their organizations integrate awareness with action.

WLP Practitioners Can Help

WLP practitioners come from many disciplines—training, human resources, quality, human performance technology, and so forth. They are champions or advocates of learning and performance and masters of practical workplace-based learning and performance interventions and change strategies. They perform many roles—manager, analyst, intervention selector, intervention designer and developer, intervention implementer, change leader, and evaluator—and each role represents a group of competencies—analytical, business, interpersonal, leadership, technical, and technological

(Rothwell, Sanders, & Soper, 1999; Van Tiem, Moseley, & Dessinger, 2001).

Action Steps for WLP Practitioners

WLP practitioners need to become analysts and change leaders if they want to help their organizations integrate awareness with action. The associated competencies they will need to achieve success include data analysis, work environment analysis, identification of critical business issues, negotiation, communication, relationship building, diversity awareness, and visioning. The last section of this chapter suggests how to use these roles and related competencies to build awareness and recommend action. Meanwhile, here are some up-front action steps to help prepare WLP practitioners and their organizations for a potential influx of OWLS.

1. Learn more about the new American workplace—major themes, changes, and consequences to the American worker.

   Read *The New American Workplace* (O'Toole & Lawler III, 2006).

2. Add to your analysis toolbox.

   Read *Organizational Surveys: Tools for Assessment and Change* (Kraut, 1996).

3. Design and implement an organizational audit to determine whether the organization is aging and in danger of becoming demographically unbalanced.

   You can plan, design, and develop the audit; collect existing data and interview or survey members of the organization; analyze the data; draw conclusions; and make recommendations for next steps. Go to Performance Support Tool (PST) 1.1, How to Perform a Preliminary Organizational Audit at the end of the Action Steps. The PST will provide you with guidelines

for conducting an audit, including questions to ask, formats
to use for data collection and analysis, and so forth.

4. Learn more about roles and competencies for WLP practitioners.

    Read *ASTD Models for Workplace Learning and Performance*
    (Rothwell, Sanders, & Soper, 1999).

5. Learn more about OWLS as workers.

    Chapter Two, OWLS as Workers, discusses work-related char-
    acteristics attributed to OWLS. The chapter also provides a PST
    for how to discover what people within an organization really
    think or feel about OWLS as workers.

PST 1.1. How to Perform a Preliminary Organizational Audit.

Purpose: To help you conduct a preliminary audit of your organization to assess the current situation and determine whether your workplace is aging and whether shifting demographics will impact the organization.

Instructions:

1. Collect the information.

   Collect existing data about the current situation in your industry and in your organization from the research and professional literature on older workers, industry reports, and human resource (HR) or other organizational records. The *Sample Data Sheet* that follows suggests the type of information you could collect about your organization. Customize the *Sample Data Sheet* so it is specific to your organization.

   You may also want to collect information and opinions from people in your organization about older workers. Interview or survey executives, human resource practitioners, managers or supervisors, workers, customers, and OWLS. Use the sample survey: *What Do You Think About the Aging Workforce?* at the end of this audit or customize the survey for your organization. The survey can also be used as an interview guide.

2. Quantify and record the information.

   Use frequency counts or percentages to quantify the quantitative data collected during the audit. Record and summarize comments and other qualitative data. You can use the *Sample Data Sheet,* spreadsheets, or a blank survey form to record the results.

   Here is an example of how to quantify the data:

   a. Total the number of the respondents to this survey.

   b. Total the number of respondents by classification—executives, managers, and so forth.

   c. Total the number of respondents by classification and age group (20–29, 30–39, 40–64, and so forth).

   d. Calculate the percentage of the total number of respondents who selected each response to each item or perception.

   e. Calculate the percentage of the respondents within a classification—executives, managers, and so forth—who selected each response to each item or perception.

PST 1.1. How to Perform a Preliminary Organizational Audit, *Continued.*

  f. Calculate the percentage in each classification who selected each response to each item or perception by age group (20–29, 30–39, 40–64, and so forth).

  g. Calculate the percentage of the total number of respondents who selected each response by age group.

  h. Other . . .

  The following is an example of how to record results after you have quantified the data.

Sample Data Record:

2. Should our organization offer the same training or retraining opportunities to older workers that we offer to younger workers?	Yes	No	Not Sure
Executives	20%	69%	11%
Managers	50%	45%	5%

 3. Analyze the data.

  Here are some analysis questions you can use to analyze the demographic and perception data you have collected and quantified or summarized:

  Sample Analysis Questions: Demographics

- What percentage of our total workforce is made up of OWLS?

- What percentage of our OWL population is in each age group: Young, Mid-Old, and so forth?

- What age group or groups of OWLS is most heavily represented in our workplace?

- What age group or groups of OWLS is represented in *each* of our divisions, departments, jobs, and so forth?

- What specific divisions, departments, jobs, and so forth have the highest and lowest percentages of OWLS?

- Other . . .

  Sample Analysis Questions: Perceptions

- How did each group—executives, managers, and so forth—respond to each question in the perception section?

PST 1.1. How to Perform a Preliminary Organizational Audit, *Continued.*

- Are the responses to each question from the different groups aligned with each other?
- How did each age group—Young to Oldest—respond to each question in the perception section?
- Are the responses from the different age groups aligned with each other?
- Are the responses from the different age groups aligned with the responses from OWLS?
- Other . . .

4. Draw conclusions.

Interpret what the results mean to the organization; make deductions based on the audit results. Here are some examples:

Sample Conclusions:

- Currently, we *are/are not* an aging workplace.
- We *do/do not* need to plan a strategy for maximizing the workplace learning and performance of our OWLS.
- The following divisions, departments, and so forth are most affected by the aging of the workforce . . .
- Our organization *is/will be* faced with an imbalance between OWLS and younger replacement workers.
- We *do/do not* need to plan how to: *retain, hire or rehire, or train or retrain* OWLS.
- Reports indicate that our industry *will/will not* be affected by shifting demographics.
- Reports indicate that the global workplace in which we function *will/will not* be affected by shifting demographics.
- Other . . .

5. Make recommendations for action.

Encourage the organization to act, based on the results of the audit. If the organization is aging or will be affected by shifting demographics, suggest that it will be necessary to collect and analyze more information. For example, suggest that the organization continue by analyzing how the organization perceives its OWLS as workers and learners (see Chapters Two and Four). Another recommendation might be to investigate existing retention, hiring, training, retraining, and career development policies, procedures, and practices for OWLS.

6. Communicate the results.

   Build awareness and, if action is required, begin to gain support for a change initiative that will maximize the performance of the OWLS and the organization. Share the process and the results of the audit with the people who provided you with the data and anyone else in the organization who needs to know—especially anyone whose support you will need if you decide to recommend further action steps. Send an email or fax report; print the results in a newsletter; discuss the results at meetings, information briefings, and brown bag lunches; and so forth.

Sample Data Sheet:

Sample Data Sheet (for use by WLP practitioner)	
Is our workplace affected by the aging trend?	
1. Total number of people employed in this organization	_____ Total number
2. Total number of OWLS employed in this organization	_____ Total number
3. Number of OWLS in each age group	___ 40–54 ___ 55–64 ___ 65–74 ___ 75–84 ___ 85+
4. Total number of OWLS in each division, department, job description, and so forth. *Note: Use a spreadsheet to collect all this data; attach it to the data sheet.*	Location # OWLS Division Department Job title

Sample Data Sheet (for use by WLP practitioner), *Continued.*

	Location	Age	#
5. Number of OWLS in each age group by division, department, and so forth. *Note: Use a spreadsheet to collect all this data; attach it to the data sheet.*	Division Department Job title		
6. Evidence that our organization is or is not aging (comparison of past and present workforce, future workforce predictions, and so forth)	Our organization is/is not aging. *Attach an executive summary and supporting documentation.*		
7. Evidence that our business or industry sector is or is not aging	Our sector is/is not aging. *Attach an executive summary and supporting documentation.*		
8. Evidence that the global workplace in which we function is or is not aging	The global workplace in which we function is/is not aging. *Attach an executive summary and supporting documentation.*		
9. Other . . .			

Sample Data Sheet (for use by WLP practitioner), *Continued.*

Is our workplace affected by shifting demographics?

10. Total number of OWLS who could retire in x year. *Note: You may want to do a projection (3 years, 5 years, and so forth) depending on available data. You may need to use and attach a spreadsheet for this.*	____Total number in ____(year)____	
11. Total number of OWLS who could retire from specific divisions, departments, and so forth in x year. *Note: You may want to do a projection (3 years, 5 years, and so forth) depending on available data. You may need to use and attach a spreadsheet.*	Location Division Department Job Title	# OWLS in (year)____
12. Total number of OWLS the organization will need to replace in x year. *Note: You may want to do a projection (3 years, 5 years, and so forth) depending on available data. You may need to use and attach a spreadsheet.*	____ Total number in ____(year)____	
13. Total number of OWLS the organization will need to replace in specific divisions, departments, job titles, and so forth in x year. *Note: You may want to do a projection (3 years, 5 years, and so forth) depending on available data. You may need to use and attach a spreadsheet.*	Location Division Department Job Title	# OWLS in (year)____

Sample Data Sheet (for use by WLP practitioner), *Continued.*	
14. Evidence that our organization *is or is not* at risk due to shifting demographics and the pending imbalance between older and younger workers	Our organization *is/is not* at risk. *Attach an executive summary and supporting documentation.*
15. Evidence that our business or industry sector *is or is not* at risk due to shifting demographics and the pending imbalance between older and younger workers	Our business or industry sector *is/is not* at risk. *Attach an executive summary and supporting documentation.*
16. Evidence that the global market in which we function *is or is not* at risk due to shifting demographics and the pending imbalance between older and younger workers	The global market in which we function *is/is not* at risk. *Attach an executive summary and supporting documentation.*
17. Evidence that we *do or do not* include strategies for addressing the issues of the aging workplace in our strategic plans	We *do/do not* include strategies addressing the issues of aging. *Attach an executive summary and supporting documentation.*
18. Other	

PST 1.1. How to Perform a Preliminary Organizational Audit, *Continued.*

Sample Survey

Title: What Do *You* Think About the Aging Workforce?

Purpose: To find out whether the people in our organization think that our organization is an "aging workplace." We plan to use the information from this survey to _____ *[What will the organization* do *with the survey results? How will the respondents benefit if they complete the survey?]*

Instructions: Please read each statement and check (✓) your *immediate* response.

If you want to add a statement or make a comment, please write it in the *Comment* box at the end of the survey.

This is an anonymous survey; however, to help us interpret the results we are asking you to provide us with some general information about yourself.

D1. Check (✓) the statement that best describes your work relationship with OWLS in this organization:

    ☐ a. As an executive I work directly and indirectly with OWLS.

    ☐ b. I hire OWLS.

    ☐ c. I manage or supervise OWLS.

    ☐ d. I train OWLS.

    ☐ e. I work directly with OWLS.

    ☐ f. I am a customer of OWLS.

    ☐ g. Other . . . (please explain)

D2. Check (✓) the age group that best describes you:

    ☐ a. Under age 20

    ☐ b. Age 20–29

    ☐ c. Age 30–39

    ☐ d. Age 40–54

    ☐ e. Age 55–64

    ☐ f. Age 65–74

    ☐ g. Age 75–84

    ☐ h. Age 85+

Thank you for your help. Please read each of the following questions and check (✓) the item that best describes how you would answer.

PST 1.1. How to Perform a Preliminary Organizational Audit, *Continued.*

1. At what age do you think a worker becomes older?	☐ 40 ☐ 45 ☐ 50 ☐ 55 ☐ 60 ☐ 65 ☐ Other ____
2. What do you think is the maximum age at which a person can actively participate in our workplace?	☐ 65 ☐ 70 ☐ 75 ☐ 80 ☐ 85 ☐ 90 ☐ 95 ☐ 100 ☐ Other ____
3. Is our organization aging?	☐ Yes ☐ No ☐ Not sure
a. If Yes, will it continue to age over the next two decades?	☐ Yes ☐ No ☐ Not sure
b. If No, will it begin to age over the next two decades?	☐ Yes ☐ No ☐ Not sure
4. Is our organization aware of the effects of aging on our workplace?	☐ Yes ☐ No ☐ Not sure

PST 1.1. How to Perform a Preliminary Organizational Audit, *Continued.*

5. Are we or will we be faced with a shortage of younger workers in the future?	☐ Yes ☐ No ☐ Not sure
6. Does our organization retain, rehire, or hire older workers?	☐ Yes ☐ No ☐ Not sure
7. Should our organization retain, rehire, or hire older workers?	☐ Yes ☐ No ☐ Not sure
8. Does our organization offer the same training or retraining opportunities to older workers that we offer to younger workers?	☐ Yes ☐ No ☐ Not sure
9. Should our organization offer the same training or retraining opportunities to older workers that we offer to younger workers?	☐ Yes ☐ No ☐ Not sure
Comment. . .	