

## Career Development and Older Workers: Study Evaluating Adaptability in Older Workers Using Hall's Model

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*This qualitative case study described the development of adaptive competence in older workers using a Model of Adaptability and Adaptation developed by Dr. Douglas T. Hall (2002). Few studies have focused on the development of adaptability in workers when faced with change and no studies have focused on the development of adaptability in older workers. The focus of the study was on Hall's three constructs of adaptive competence; identity exploration, response capacity and integrative potential.*

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Human resource development professionals have amassed an impressive body of knowledge on how to assemble, train, and sustain a competent workforce, but they face a daunting challenge over the next ten years. The talent pool is getting significantly older as the baby boomers approach the traditional ages of retirement. The workers needed to replace those aging workers, as they exit the workforce, clearly are not sufficient. Older workers also have a strong desire and/or need to continue working. In the industrial nations of the world the effects have already been felt. Japan, the U.S., and Western Europe are all rapidly aging societies. In the U.S., the demographers at the Social Security Administration expect the number of elderly people to double by 2035. Currently, there are five Americans in their prime working years (20 to 64) for every individual over 65. Assuming no massive changes in immigration policy, that ratio will change to three-to-one in 2025. By 2075 the two groups will be virtually the same size (Schwartz, 2003). This radical change in the demographics of the workforce has never been experienced and there is little research to guide organizations in addressing the adaptive skills of this soon to be large cadre of older workers.

Environmental forces such as when, where, and how work is done, are changing so constantly and dramatically that individuals must adapt, not just to a single incident but to a series of changes that give every indication of continuing throughout each person's increasing lifespan. Each change forces the person involved to adapt to that specific incident and those incidents are less predictable than they were a half century ago (Morrison & Hall, 2003).

Career development has been important to working people for generations. For many years, employees placed much of the control of their career in the hands of their employer. The traditional career that emerged during the industrial age, where the workers exchanged loyalty and commitment for lifetime employment, is being replaced by something much different today. The concept of climbing the career ladder in one organization, as typified in *The Organization Man*, was gone (Whyte, 2002). Brooks (2002) stated that very few of the new workers in the United States assume he or she will work in the same profession, or at the same plant, or for one paternalistic organization all his or her life. This attitude is in marked contrast to the one generally espoused by their parents. Individuals' careers are becoming more protean, i.e., self—rather than organization—directed (Hall & Mirvis, 1995; Hall & Moss, 1998). This constant, unpredictable, ever increasing demand on the individual to progress through the adaptation process means that we need to develop and continuously maintain our adaptability in order to cope successfully (Morrison & Hall, 2003). It is further suggested that both adaptability and adaptation are constructs requiring individuals to develop and utilize dynamic rather than static models of behavior. Morrison and Hall (2003) claimed adaptability was not a simple reactive process. They surmised that the process is much more complex, involving the evaluation of the environment and oneself and perhaps making changes to both when faced with new and novel situations. Earlier research describes individuals as having a tendency to be proactive, to create novel experiences, in addition to changing their environments as represented by leaving their jobs, divorcing, and retiring early (Goodman, 1994; Super & Knasel, 1981).

The process of evaluating the requirements of individuals and adaptability has allowed many questions to go unanswered to this point.

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Kegan (1994) proposed it was possible the complexity and rate of change in family and other social systems demanded a level of adaptive skills not feasible for the majority of people.

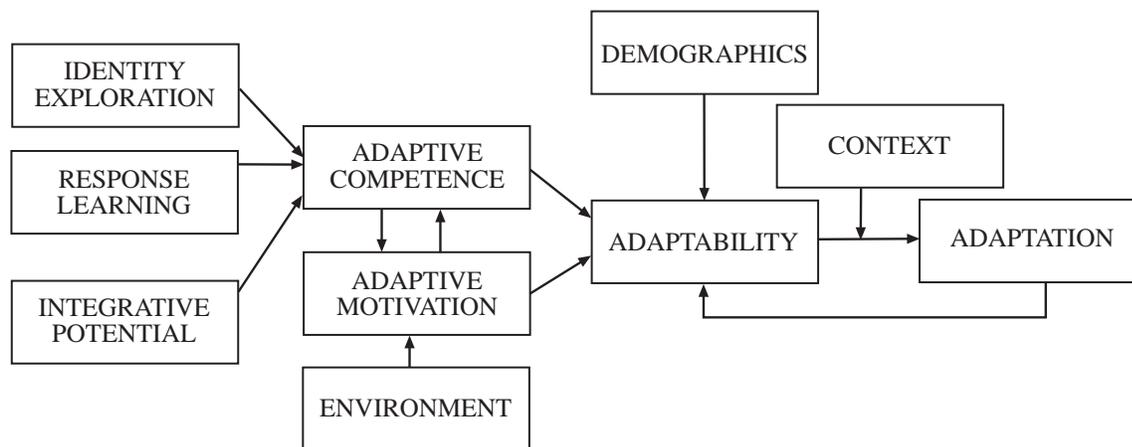
Further suggestions were made that the responses of organizations to new competition, technologies, and world dynamics in the form of mission and role changes (Edwards & Morrison, 1994) and “boundarylessness” (Gunz, Evans & Jalland, 2000) is demanding more adaptation than their members can supply. Baltes and Baltes (1990) suggested that the increasing life span for individuals may be requiring too much adaptation because of their declining physical and mental states. With an aging population, maintaining the employability and skills of older workers is a critical human resource issue not just for employers but also for the larger economy (Hall & Mirvis, 1996, 1998). These suppositions are even more critical when directed at the evaluation of adaptability in older workers. Before these questions can be answered, a much clearer, deeper, more thorough understanding of adaptability in older workers is needed.

Organizations will need older workers in greater numbers than ever before. Older workers will need to continue working for a variety of reasons. Higher level skills at adapting to continuous change will be required. These higher level skills and the processes of adapting are not clearly and fully understood in older workers. This area will provide the basis for the research in this study. The problem that influenced the need to undertake this study is the increased demand for older workers in the workplace coupled with the lack of knowledge and understanding about their adaptability.

### Theoretical Framework

Hall’s Model was utilized as a theoretical framework for the study. Morrison and Hall (2003) distinguish between adaptability (a generalized state of readiness to respond to any new situation) and adaptation (the process of applying adaptability in response to a specific altered situation). Hall’s Model suggests that adaptability is composed of two facets, the competence for adapting and the motivation to do so, and is a direct primary influence on adaptation. Adaptive competence and adaptive motivation affect each other in a reciprocal manner. That is, to be adaptable, a person must be both capable of responding to any new situation and willing to do so. And, being motivated to tackle a new situation enhances the development of the competence to face change while the development of competence increases the desire to change. Sets of individual differences and environmental factors that affect the development of adaptability are identified in this model, as well as situation-specific factors that help explain when a person with high adaptability is aided in or constrained from translating that adaptability into actual adaptation (i.e., change in the person) (Morrison & Hall, 2003). Figure 1 is a graphic example of the components of Hall’s Model of the Components of Adaptability and Adaptation (Hall, 2002).

Figure 1. Hall’s model: The components of adaptability and adaptation



Morrison and Hall (2003) conducted an extensive review of empirical and theoretical literature in the development of each construct of their model and also determined how those constructs relate to each other. The two central issues of Hall’s Model are adaptability and adaptation. Adaptability has two subordinate constructs, adaptive competence and adaptive motivation. Adaptive competence will be the focus for this research. Adaptive motivation was not a focus for this research; however, it was addressed as the process of the qualitative case study evolves.

Emphasis was on the three facets of adaptive competence and how these factors interact in an effective change process and how these factors contribute to the individual's career adaptability.

Hall's Model (2003) uses a life span approach emphasizing that the development of adaptability and its application in adaptation occurs continuously rather than at any single point in time or in any chronologically keyed stages (Hall, Briscoe, & Kram, 1997; Morrison, 1977; Vaillant, 1977). Adaptability and adaptation are referred to in multiple societal roles where work and non-work roles are closely and inextricably intertwined (Blustein, 1997), but the focus will be on the individual in the work environment.

Savickas (1997) defines "adaptable" as meaning to learn or understand taken from "apt," the word's root. Individuals are faced with the need to learn or understand or are faced with a novel situation, one that requires us to change in some way. Adaptability helps an individual deal with change (Morrison & Hall, 2003). The first component of Hall's Model posits the following:

$$\text{Adaptability} = f(\text{Competence, Motivation}).$$

That is, the ability to respond effectively to change in the environment is a function of competence and motivation. In discussing this model, the focus will be on competence.

Morrison and Hall (2003) described three different components to the competence to adapt. They proposed that adaptive competence is a function of the maturation of the identity as it becomes clarified, cohesive, and comfortable to the individual; response capacity, and integrative potential. The purpose of this case study was to explore and more fully understand adaptive competence in older workers at a large public school system in the Midwest. This study investigated the career adaptability/adaptation process and its relationships in older workers using Morrison and Hall's (2003) Model of Career Adaptability and Adaptation (Hall's Model). This study examined the construct of adaptive competence contained in Hall's Model. At this stage in the research, adaptive competence was defined as a generalized capacity to respond with resilience to challenges arising from one's body, mind, and environment (Featherman, Smith & Peterson, 1990). Conversations with Dr. Hall had suggested that there had been no research studies done to-date evaluating any of the particular components or constructs of Hall's Model as they applied to workers in general and most specifically to older workers. In response, this paper explored the following questions.

### Research Questions

1. How do older workers describe their career experiences and the development of adaptive competence?
2. Do older workers describe the components of adaptive competence and, if so, what do they say about the relationship of these components to their career experiences?
3. How do older workers describe the affects of training and education and the development of adaptive competence in their own careers?

### Methodology with Limitations

In this section, the choice of the method of inquiry as well as the choice of the related data gathering and data analysis procedures used for this study are discussed in detail. As part of the discussion, the chosen method and procedures are related to the study

#### *Type of Design Used.*

A case study approach with multiple informants was selected as the research design for this qualitative study. The case study method has been used for research in many different fields, including psychology, sociology, economics, business, political science, and social work. Yin (2003a) defined case study as an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident. According to Yin, it is particularly suited to a situation in which there are many variables, and for this reason it uses multiple sources of evidence, including written records, interviews, and observations. This definition may be somewhat limited in its usefulness unless one is already familiar with case study research. This study used organizational records to evaluate demographics in the selection of study participants. Structured in-depth interviews were used as well as observations of the participants in their natural work settings.

A case study is an exploration of a "bounded system" or a case over time through detailed, in-depth collection of information rich in context. This bounded system is bounded by time and place, and it is the case being studied—a program, an event, an activity, or individuals (Creswell, 1998). This study focused on individuals (older workers) at a large Midwestern public school system and the development of adaptability over the course of their careers.

#### *Assumptions.*

This study made several assumptions about the selection of the participants and the nature of the case study research design. This study focused on the career experiences of older workers and the development of adaptive competence as a construct contained in Hall's Model. The participants were selected purposely by the researcher to provide the greatest and most in-depth data possible. It was assumed that the information provided by the participants was honest and truthfully reflected their experiences and opinions. The background and experiences of the researcher affected the data gathering and interpretation. The data was gathered in a setting that most appropriately reflected the environment in which the participants existed. Participants suffered no harm from any phase of this research study and care was taken to protect the privacy of the individuals and the institution.

*Limitations.*

Qualitative case studies have inherent limitations. Regarding this research study, the findings were only relevant in the context from which the information was collected. The researcher was the primary research tool. The researcher's age and prior experience had a potential influence on the interpretations of the comments and facts gathered at the case sites. Qualitative research places a great deal of reliance on the perceptions of the informants and the researcher. Therefore, many of the recollections, opinions and statements of the informants were reflected biases of these individuals. The researcher's interpretations will necessarily reflect bias as well. These factors also limited the generalizability of the study to other individuals, organizations, and environments. Therefore, care was taken not to attempt to generalize the results of this study to all individuals or all educational settings.

The purpose of this qualitative study was to gain in-depth information about the adaptability and adaptive process of the informants to further inform Hall's Model (2003) and provide insight and direction for further research that will aid in the application of Hall's Model in the field of HRD practice. Denzin (1989) suggested connecting the informant's experiences with the larger environment. To achieve this, the researcher must set aside validity, reliability, generalizability, and theoretical relevance in favor of literary interpretation and meaning. The results of this study were based on the perceptions, experiences, and interpretations of the informants and as a result should be limited to that context.

## **Results and Findings**

The intent of this study was to explore and more fully understand adaptive competence in older workers. This study investigated the career adaptability process and its relationships in older workers using Hall's Model (2003) of Career Adaptability and Adaptation. Data were gathered in the form of interviews, documents and field notes. The study concentrated on examining the construct of adaptive competence in older workers in a large public school system in the Midwest. The study had two female participants who were given the pseudonyms of "Jennie" and "Judy". Likewise, the two male participants were identified as "Tim" and "Steve".

From the beginning of this study, the four participants began to describe a wide variety of career experiences that had an impact on their development of adaptive competence. The four participants found that their careers had been filled with challenges, struggles, frustrations, disappointments and surprises. The environment of each participant dictated the development of different responses. Each participant was able to describe his/her career experiences and the development of adaptive competence. The relationship of the components of adaptive competence was described by each participant and each was able to describe how the components were viewed in his/her respective careers. The affects of training and education were described as each participant progressed through the development of adaptive competence in their careers.

Judy described herself as a risk taker. She attributed the early development of this part of her identity to the support and encouragement of her family while she was growing up. The later development of her identity was greatly impacted by the wide variety of experiences she encountered while progressing through the years of early adulthood. These experiences and situations that Judy described as having an impact on her adaptive competence were for the most part, responses to environmental demands. Adjusting to new cultures was demanded of her as she followed along with her first husband as his career took him to Spain and South America. Later, divorces and single parent child rearing demanded that Judy expand her definition of herself to include factory work and also increasing her need for further formal education in her chosen field. Even though Judy typified herself as a risk taker, she felt that she was not always the first to volunteer for new assignments but preferred to observe, ask questions and gather information prior to moving into a new job or task. For Judy, training and education provided her with the new skills and knowledge that was needed to successfully adjust to changes in her career. She felt that her development of adaptive competence was most directly attributable to the experiential learning that occurred from her exposure to a wide variety of different experiences both as a young person and later as an adult.

Jennie described the development of her identity and the ability to respond to her changing environment in terms similar to those provided by Judy. Jennie was also strongly encouraged by her family to try a variety of new

things and activities when she was young. The confidence she developed from the successful engagement with new tasks as a young person provided Jennie with the ability to successfully adapt to changes that she found occurring later in her life. Jennie also called herself a risk taker; however, for her; it took more encouragement and prodding at times to move her into new jobs. It was only after the assumption of new jobs, did Jennie realize that she had the skills and abilities to be truly successful in those new endeavors. Divorce, later in life for Jennie than for Judy, had the affect of forcing Jennie to examine her identity. She had to respond to the sudden environmental changes demanded of her as she suddenly became a single parent. Jennie described herself as slower to change. She found training and education to be most important for her development of computer skills where she preferred one-on-one training to formal classroom training.

Steve grew up in a small rural area. His experiences with adapting to new cultures and situations were mostly by choice and not by chance, unlike those of Judy and Jennie. Steve had made all of his career moves as responses to internal demands. Steve termed himself a risk taker also. He had enjoyed a number of different career experiences before going on to college to become a teacher. He also detailed the support and encouragement of his family in the development of his willingness to seek out new opportunities. Steve described his identity as possessing more of an internal desire to learn and to grow professionally. Activities of a routine nature soon found Steve losing interest. Steve was able to describe the development of his skills and identified himself as more of a 'people person'. Steve was the only participant that had not been divorced. Steve felt that he did not experience any substantial cultural growth until after his exposure to racial integration in his second teaching assignment. This experience allowed him to expand his interpersonal skills in dealing with people from a variety of cultural backgrounds. Steve also attributed a large portion of the development of adaptive competence to the experiential learning that occurred as a result of encountering a wider variety of situations in his career.

Tim had the most varied and numerous career experiences of the four study participants. He was a self-described renaissance man as he was always seeking new challenges to continue in his process of identity exploration and regeneration. Tim had experienced substantial cultural growth while growing up in a multi-cultural neighborhood as a child in Boston. His family also provided ample support and encouragement in the pursuit of new tasks and experiences. Tim was quick to assess environmental requirements when faced with a new opportunity. His ability to evaluate his skills in light of the environmental demands was clearly evident. Divorce and re-marriage for Tim had a lessened effect on Tim's adaptability skills as it came at a much later time in his life. The acquisition of additional skills and abilities for Tim was demonstrated by his increased desire for experiential opportunities and access to other people versus more formalized training opportunities. Tim identified experiences that expanded his abilities and identities far beyond what he thought were possible.

This study found that the components of adaptive competence in Hall's Model (2003) were described by the older workers as being integral parts of the development of adaptability. The participants all commented on the importance of mentors in their development of adaptive competence. They felt that the support, encouragement and guidance provided by mentors was especially important for older workers when they encounter new and novel situations. The divergence in the development of adaptive competence between the female and the male participants grew evident as the study progressed. The comments provided by the female participants indicated that their development of adaptive competence was more reactive to changes in their work environments. The two male participants indicated that they were much more proactive in their adaptation to new and varying career opportunities. Three of the four participants selected as being highly adaptable had been married and divorced (five times for Judy). Further study may be needed to more fully develop the relationship between gender, life events such as marriage and divorce, and the development of adaptive competence.

The first major contributor to adaptive competence contained in Hall's Model (2003) was identity maturation. This study was able to support and inform the construct of identity maturation in the development of adaptive competence in older workers. Clearly, identity maturation contributed to the evolution of the identity in older workers that took place during successive interchanges between the self and the environment that were composed of the variety of roles representing contrasting attitudes, values, and interests. The second major contributor to adaptive competence proposed in Hall's Model (2003) was response capacity, i.e., the ability to learn and modify performance so that it is consistent with the requirements of significant changes in the environment, especially those that are unpredictable. This study was able to describe the development of response capacity in older workers as they progressed through their respective careers. The construct of integrative potential between the self and the environment was informed through the successive descriptions of adaptation events provided by the study participants.

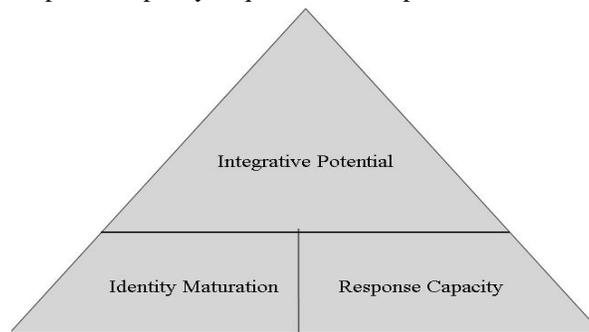
### **Contributions to new knowledge**

This investigation further sought to clarify and/or inform the construct of adaptive competence in this theoretical model for further development. Outcomes of this in-depth investigation will be used to further develop the model with respect to the training and education opportunities that would prove to be most useful to both individuals and organizations in addressing adaptive competence in older workers.

The major contribution this study made to the already existing body of knowledge was its unique exploration of adaptive competence in older workers using Hall's Model (2003). This model provided an adequate framework for the investigation and understanding of the adaptive process in older workers. Further investigation is suggested to develop a better understanding of the developmental process for risk aversion as a part of adaptive competence in older workers. Preliminary indications from this study indicated that it is developed earlier in the life and career of older workers versus later. The relative importance of mentors in the development of adaptive competence in older workers needs further study to determine its part in the process for older workers. The topics of risk aversion and mentoring were not contained in the initial development and discussion of Hall's Model (2003).

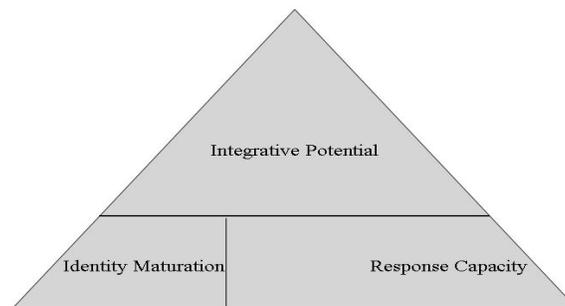
Further research is needed to more fully understand the relationship between adaptive competence and adaptive motivation as suggested in Hall's Model (2003). Hall had described the relationship between identity maturation and response capacity as being somewhat equal. These two constructs provide the basis for integrative potential. This is displayed graphically in Figure 2.

Figure 2. Identity Maturation/Response Capacity: Equal relationship



The results of this study indicated that all four participants had developed adaptive competence at a fairly high and somewhat equal level. Even though all participants were fairly equal in their competence to adapt, the two female members of the study indicated that they had to be more strongly encouraged to make career or role changes. The relationship between identity maturation and response capacity for the two female participants in the study would look more like the relationship displayed in Figure 3. They had developed adaptive competence in more of a reactive mode due to the influences of situations that they encountered. Many of these situations developed more by chance than by choice.

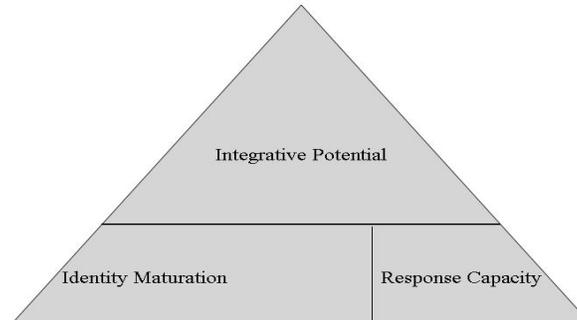
Figure 3. Stronger influence imposed by response capacity.



The male participants, who were equally competent at adapting, indicated that lower levels of motivating factors were involved in the career or role changes. The developmental process for the male participants was more proactive. Their responses indicated that they had more intrinsic motivation in efforts to learn more and acquire new skills. In efforts to explore and expand their identity, they selected new jobs and tasks that placed them in situations where they had to develop their response capacity to effectively address the new environment. The relationship between identity maturation and response capacity for the male participants is displayed in Figure 4. The intrinsic and extrinsic components of adaptive motivation need to be studied for the further understanding of Hall's Model (2003) as it applies to older workers. The relationship between identity maturation and response learning needs further investigation to fully understand the variation in motivational factors indicated by the difference between the

male and female participants. The results of the study suggest that the components of adaptive motivations should be more directly attached to the constructs of identity maturation and response capacity. This study provided a preliminary indication that the level of adaptive competence in an older worker can be evaluated. The rubric that was used to select the study participants needs further development. The further development is needed to provide a measurement instrument in the evaluation of adaptive competence in all workers.

*Figure 4. Stronger influence imposed by identity maturation.*



Further study is needed to better understand adaptability in older workers using Hall's Model. Individuals who have low levels of adaptive competence need to be evaluated to determine what the barriers are to the development of adaptive competence in older workers. Further study also needs to be extended to older workers in a broader context to include other areas of the working world in addition to this study that was conducted in education at Northeast Public schools.

The results of this study can improve the Human Resource Development field of practice as it relates to older workers. The participants in this study demonstrated the skills and abilities to adapt quite well to a wide variety of career opportunities. Older workers can adapt to an increasingly complex environment. The adaptive competence of older workers is impacted greatly through experiential learning. The opportunities to experience a variety of job and career roles should be included in the training and education initiatives in organizations that seek to develop the adaptive competence in the workforce. The knowledge and skills required for older workers to perform in new roles need to be assessed and the learning opportunities developed that best meet these needs. Clearly, older workers can and will successfully adapt to new career roles. A better understanding of adaptive competence could lead to increase performance in organizations. Perhaps change efforts in organizations could be more successful if the levels of adaptive competence could be measured and evaluated prior to any planned change events.

### Conclusions and Recommendations

The descriptions of career experiences shared by the study participants provided information to describe the development of adaptive competence in older workers. The meanings of the three constructs of adaptive competence in Hall's Model of Adaptability and Adaptation were contained in the descriptions provided by the study participants.

Role variety was identified by the participants as having a major influence on identity maturation. The development of skills at exploration, assimilation and accommodation was closely linked to activities associated with role variety. The willingness to take risks was described by the participants as developing earlier in their lives versus later in life. The affects of early family support on the development of a willingness to take risks was also described. To a lesser extent, the affect of life events and stress on identity maturation were described by some participants.

Role variety was also identified by the participants as having a major influence on response capacity. Developing expertise in responding to environmental requirements was closely associated with role variety. Reflections on experience, planfulness and exploration skills were impacted by role variety. Learning to learn, dialectic reasoning and trial and error decision making as components of response capacity were also associated with role variety. The construct of integrative potential was informed by the descriptions of the participant's experiences at making changes in their careers. The skills at obtaining information about the self and the environment were continually developed through a variety of roles and experiences. The affect of mentors on the development of response capacity was highlighted by all participants. Incidental comments were made about the affects of planning and prioritization on response capacity. The three constructs of adaptive competence were examined through the descriptions of the career experiences of the study participants. A clearer, deeper understanding of adaptability in older workers was the result this study

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