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ABSTRACT

This symposium on workplace issues in human resources consists of two presentations. "The Effect of Organizational Structure on Single-Source and Multiple-Source Performance Appraisal Processes: Implications for Human Resource Development (HRD)" (Karen K. Yarrish, Judith A. Kolb) investigates ratee acceptance of single- and multi-source performance feedback for employees working with a loosely coupled (nontraditional) and a tightly coupled (traditional) organizational system. Findings indicate at least a low-moderate degree of acceptance of both types of feedback by all participants. "An Exploratory Examination of the Literature on Age and HRD Policy Development" (Tonette S. Rocco, David Stein, Chan Lee) reports an examination of the literature on older workers to identify themes related to workers who remain, return, or retire from the workplace. It relates that 4 databases were searched producing 523 abstracts, from which these 4 themes were generated: retirement is an outdated notion; the importance of older workers to organizations is changing; older adults are active agents negotiating employment decisions; and career development programs are a worthwhile societal investment. Both papers include substantial bibliographies. (YLB)

2001 AHRD Conference

Workplace Issues in Human Resources

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Tulsa, Oklahoma

February 28 - March 4, 2001

The Effect of Organizational Structure on Single-Source and Multiple-Source Performance Appraisal Processes: Implications for HRD

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The purpose of this study was to investigate ratee acceptance of single-source and multi-source performance feedback for employees working within both a loosely coupled (non-traditional) and a tightly coupled (traditional) organizational system. One hundred and eighteen nurse aides participated in a pre- and post-survey to investigate differences in employee acceptance based on the type of organizational structure in which they worked. The findings indicate at least a low-moderate degree of acceptance of both types of feedback by all participants.

Keywords: Performance Appraisal, Performance Feedback, Organizational Structure

The purpose for conducting performance appraisals has not changed much over the years, but the structure of jobs and organizations has changed dramatically. In the past 10 years, there has been a clear shift in the structure of organizations (Waldman & Atwater, 1998). Greater emphasis is being placed on decentralization, downsizing, teams, and telecommuting. The current workforce is organized differently and is not always even located geographically together (Buhler, 1997). These differences in the U.S. workforce have created enormous challenges to management and to HR/HRD professionals who are responsible for developing, implementing, and assessing systems to measure performance and provide feedback to employees at all levels and locations.

These new types of working environments are referred to as "loosely coupled" (Weick, 1976). Such systems contain parts that are related to each other but still retain their individual identity and logical or physical separateness. A tightly coupled system is the traditional work situation in which a supervisor works closely with subordinates and supervises their work on a regular basis.

The traditional hierarchical performance appraisal system does not favor the current work environment (Waldman & Atwater, 1998). Jobs have greater responsibility, more flexibility, and less direct supervision. As a result of these changes, organizations must consider alternatives to the traditional, hierarchic, supervisor-controlled performance evaluation process. These alternatives, to be effective, must have the acceptance of employees. Without such acceptance, organizations would not receive the benefits of continual employee motivation and improvement. According to Gebelein (1996), an organization only changes when its people change, and multi-source feedback supports this process in several ways. It helps the organization to 1) identify the competencies and skills needed to achieve business goals, 2) develop training programs to attain those skills and 3) track employees' progress in applying them on the job.

In order for multi-source or 360-degree feedback to be successful, it must be accepted as valid by the employee being evaluated, hereafter referred to as the ratee. Research indicates that the ratee's viewpoint is important. Ratee acceptance of the appraisal system is crucial to its long-term effectiveness (Cascio, 1995). The ratee's acceptance of the appraisal system as fair is a key component of an effective performance appraisal process, but this factor has not been sufficiently addressed by research (Latham & Wexley, 1981).

Several researchers (Church & Bracken, 1997; Funderburg & Levy, 1997; Lawler, 1967; London & Smither 1995; London, Smither & Adsit, 1997; Salam, Cox, & Sims, 1997; Tornow, 1993; Waldman, 1997; Westerman & Rosse, 1997) have examined variables related to multi-source/360-degree feedback including such issues as accountability, perceptions, and rater attitudes. Additional studies have been conducted to examine ratee acceptance of various forms of performance appraisals (Albright & Levy, 1995; Bernardin & Buckley, 1979; Bernardin, Dahmus & Redmon 1993; Gosselin, Werner & Halle 1997; Robinson, Fink, & Allen, 1996). This focus on ratee acceptance has its genesis in the work of early motivational researchers such as Herzberg (1959) and Likert (1967), who found that employee recognition, achievement, and employee involvement in decision making all led to

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increased levels of motivation and satisfaction in employees. Less attention has been focused on the role organizational structure plays in the success of multi-source/360-degree feedback. The study described in this paper addresses this gap in the extant literature. The study investigates ratee acceptance of single-source and multi-source performance feedback in both a loosely coupled and a tightly coupled organizational system.

Research Questions

- RQ1: What is the difference between ratee acceptance of a single-source and multi-source performance feedback appraisal in a loosely coupled organizational structure?
- RQ2: What is the difference between ratee acceptance of a single-source and multi-source performance feedback appraisal in a tightly coupled organizational structure?
- RQ3: Is there a preference in ratee acceptance of a single-source versus a multi-source performance appraisal feedback system based on the type of organizational structure, specifically, loosely coupled or tightly coupled?
- RQ4: How do supervisors working in a loosely coupled and a tightly coupled organizational structure view the accuracy and fairness of single-source and multi-source feedback systems?

Methodology

Sample. Sixty-one home health care aides and 57 nurse aides from a 2200-person allied health facility located in northeastern Pennsylvania participated in this survey. The home health care aides, who are not closely supervised, represented the loosely coupled structure; the nurse aides, who receive direct supervision, represented the tightly coupled structure. The majority of the participants were in the 33 to 62 years of age category and had a high school/GED level of education. The participants had a mean of 7.46 years at their current position and a mean of 6.6 years employed by the allied health facility.

Procedures. Employee satisfaction was measured before and after the implementation of a multi-source feedback system. Data was collected using pre- and post-surveys and focus groups. A proposal was submitted to the health care facility requesting permission to survey two groups of employees and to implement a multi-source feedback performance appraisal process at the health care facility for these two groups of employees. The two groups completed a pre-survey based on the existing single-source traditional performance appraisal system. Then, a new multi-source feedback system was implemented. The multi-source feedback process collected scores from an evaluation team for each employee consisting of self, supervisor, customer, and colleagues. The evaluation forms used to evaluate each person's job performance were developed by using a set of behavioral criteria developed specifically to meet the objectives and goals of the allied health facility. These behavioral criteria were directly linked to the individual's job description. Each employee participating in the research was trained on the procedures to use in providing and receiving feedback. After participating, each ratee received a graph indicating a composite score for each performance criteria evaluated.

After participating in the multi-source feedback performance appraisal process, each participant was asked to complete a post-survey. The post-survey measured their level of acceptance of this new multi-source feedback process.

The ratings from the pre- and post-surveys of both the tightly coupled and loosely coupled groups' data sets were compared to determine the impact of multi-source feedback versus single-source feedback on ratings of ratee acceptance in both a tightly coupled and a loosely coupled system. The research design is displayed in Table 1.

Surveys. The authors use the terms pre- and post-surveys throughout this paper to indicate surveys completed before and after the implementation of a multi-source feedback system. However, readers should keep in mind that the procedure used does not reflect a traditional pre- and post-survey design. The pre-scores represent satisfaction with an existing single-source evaluation system. The post-scores reflect satisfaction with a newly implemented multiple-source system. The pre- and post-surveys used in this study were modified from one developed by Edwards and Ewen (1996) and consisted of 20 Likert-type questions scaled from 1 (strongly disagree) to 5 (strongly agree). The questions measured employee satisfaction with both a traditional and multi-source

feedback system. Sample questions are as follows: I have confidence (trust) in the rated results, the process provides information that will help me improve my performance, I like (the current) performance appraisal process,

Table 1. Research Design

Method Used	Groups	Participants	Pre-survey Measuring Satisfaction With Past	Multi-source Feedback	Post-survey
Single Source Feedback	Loosely Coupled	Home Health Care Aides N = 61	O ₁	X	O ₂ y ₁ =acceptance
Single Source Feedback	Tightly Coupled	Nurse Aides N = 57	O ₃	X	O ₄ y ₁ =acceptance

and the process reflects a complete assessment of performance. The pre-and post-survey instruments also asked four questions pertaining to the general organizational climate. These four questions measured employees' beliefs about appreciation of work, freedom to discuss issues with a supervisor, and the extent to which his or her work was valued.

Focus groups. In addition to gathering data from the surveys, information was collected in small focus groups. These focus groups were made up of the supervisors of both sets of employees being surveyed and were utilized to gather information regarding both the single source and the multi-source feedback processes from the perspective of the supervisors.

Limitations

The sample used in this study was representative of only one type of loosely coupled and one type of tightly coupled system in an allied health organization. Caution needs to be exercised in generalizing the results of this study to other organizations. Also, subjects in this study were in non-exempt or non-managerial positions. Data collected on managerial-level employees may yield different results.

Employees in the organization in this study were asked for feedback on a previously existing single-source feedback system and a newly implemented multi-source procedure. The novelty of the multi-source system may have influenced results.

Results and Findings

Research Question 1. What is the difference between ratee acceptance of a single-source and multi-source performance feedback appraisal in a loosely coupled organizational structure?

The data from the survey questionnaire relates to the respondents' perceptions regarding their satisfaction with the performance appraisal process being utilized by the organization at the time the survey was administered. The pre-survey measured perceptions of the single-source performance appraisal, whereas the post-survey measured perceptions of the multi-source feedback performance appraisal process. Twelve of the twenty questions had a mean value of 3.5 or higher in both the pre- and post-survey results. The remaining eight questions had scores closer to the mid range mean of 3.0, and these scores did not vary substantially for the pre-and post-survey values.

Question number five of the pre-survey asked to what extent the respondents liked their current performance appraisal process. The mean response rating for the single-source performance appraisal process was 3.0 (SD = 1.4); the mean for the multi-source system was 3.7 (SD = 1.2). However, the remaining questions reflected relatively little difference in acceptance levels of the two types of performance evaluation systems. Means for the remaining questions of the respondents in the loosely coupled group did not fall below 2.5, indicating a low-moderate acceptance rate for both the single-source and multi-source performance appraisal processes. Only on the question, "I believe the results of the performance appraisal would be used fairly for promotion purposes," did the mean score fall below 3.0. (Pre mean = 2.9; SD = 1.7; Post mean = 2.8, SD = 1.7). From this it can be concluded that the respondents in the loosely coupled system perceived both the single-source and multi-source performance appraisal processes as moderately acceptable. See the appendix for a listing of the survey questions and pre- and post-scores for both loosely coupled and tightly coupled systems.

Research Question 2. What is the difference between ratee acceptance of a single-source and multi-source performance feedback appraisal in a tightly coupled organizational structure?

The pre-survey measured perceptions of the single-source performance appraisal method that was in place at the beginning of the study, whereas the post-survey measured perceptions of the newly implemented multi-source feedback performance appraisal process. Only three of the twenty questions had a mean of 3.5 or higher in both the pre- and post-survey results. The remaining seventeen questions had pre-survey scores that were lower than the post-survey scores.

Although the mean pre-survey scores were lower than the mean post-survey scores, none were below 2.5, indicating a low-moderate level of acceptance of both the single-source and multi-source performance appraisal feedback processes. As with the loosely coupled group, the tightly coupled group preferred the multi-source feedback process over the single-source process (question 5) (single-source $M = 2.7$, $SD = 1.2$; multi-source $M = 3.3$, $SD = 1.0$). In response to each question, the tightly coupled system group reported a higher mean score for the multi-source system. Thus, results indicate that the tightly coupled more traditionally structured group preferred the multi-source feedback system.

Research Question 3. Is there a preference in ratee acceptance of a single-source versus a multi-source performance appraisal feedback system based on the type of organizational structure, specifically, loosely coupled or tightly coupled?

Results are presented in Table 2.

Table 2. Mean and Standard Deviation for Differences in the Pre-Score and Differences in the Post Score Between the Loosely Coupled and Tightly Coupled Groups in the Organization

Variable	n	*M	SD	Range		t	p
				Low	High		
Pre score				43	110	2.8	0.007
Loosely coupled group	61	86.9	17.4				
Tightly coupled group	54	78.4	15.2				
Post score				40	110	0.7	0.507
Loosely coupled group	60	86.4	19.4				
Tightly coupled group	53	84.4	12.0				

*Scores could theoretically range from 22 to a high of 110.

Data reveal a significant difference ($t = 2.8$; $p = .007$) on the pre-survey (single-source feedback) between persons in the loosely coupled and tightly coupled groups. Individuals in the loosely coupled group had a significantly higher pre-score ($M = 86.9$; $SD = 17.4$) than did persons in the tightly coupled group ($M = 78.4$; $SD = 15.2$). People who worked in the more traditional environment reported a less favorable reaction to single-source feedback systems.

Data reveal no significant differences ($t = .7$; $p = .507$) on the post-survey (multi-source feedback) between persons in the loosely coupled group and tightly coupled groups. The type of organizational system, loosely coupled or tightly coupled, did not affect ratees' acceptance of multi-source performance evaluation systems.

On the questions related to organizational climate, there was a significant difference between the loosely coupled and tightly coupled groups for the question "my employer values and appreciates my work." The loosely coupled group had a mean of 3.9 ($SD = 1.2$); the tightly coupled group had a mean of 3.3 ($SD = 1.2$). For the remaining three questions, no significant differences were found.

A final question on the survey asked respondents whether they recommended continued use of the multi-source performance appraisal process. Sixty-four percent were in favor of continuing the process.

Research Question 4. How do supervisors working in loosely coupled and tightly coupled organizational structures view the accuracy and fairness of single-source and multi-source feedback systems?

Supervisors of employees in this study reported less favorable reactions to multi-source feedback than did those they supervised. Inaccurate evaluations and possible abuse of the process were mentioned as areas of concern by supervisors in focus groups. Particularly in the tightly coupled group, the supervisors believed that poorer performers received higher ratings than they deserved from people other than their supervisors.

Conclusions and Recommendations

The results of this study indicate no significant difference in ratee acceptance of multi-source performance appraisal feedback processes between employees working in newer loosely coupled organizational systems and those working in more traditional environments. Both groups indicated a moderate-range level of acceptance of a multi-source performance evaluation system. Both groups also reported a low-moderate level of acceptance of single-source systems, although workers in traditional environments were more critical of this method.

Although employee acceptance of performance evaluation systems is crucial, it is by no means the only consideration. Accuracy is also a consideration. Ratees in this study believed that multi-source feedback processes lessens favoritism and politics whereas supervisors believed that, in at least some cases, the process produces evaluations that are inaccurate, unbalanced, and less controlled than those provided by a single-source system. Future research focusing on the differences in ratings among all ratees would provide interesting and useful data.

An important consideration for any organization considering implementation of a multi-source performance feedback system is the extent to which coworkers and other raters possess the information necessary to give accurate and relevant feedback on each other's performance and the skills required to give and receive performance feedback. Research shows that people are not always skilled at giving and receiving feedback (London, Smither, & Adsdit, 1997). Candid feedback that individuals are not afraid to give or receive takes substantial effort to achieve. The responsibility for developing such skills in organizational employees falls primarily to HRD professionals.

Because ratee acceptance of a performance appraisal process has been found to be important to the overall success of the program, organizations should consider surveying the employees before a decision is made to invest in a multi-source system. Research, software, and development costs alone can range into the six-figure range. Training in the use of the system and the development of an organizational culture that encourages the exchange of honest and tactful performance feedback adds another substantial expense. None of this expenditure makes sense if employees are not convinced of the value of a multi-source system.

Implications for HRD

In today's rapidly changing organizational environment, more and more businesses are looking for improved methods of providing performance feedback. Because organizational structures have been changing so quickly, organizations have had a difficult time trying to provide accurate feedback to employees in a format that they accept. An important finding in this study was that organizational structure was not a significant factor in employees' satisfaction with the multi-source performance evaluation system.

As more organizations continue to move away from the traditional hierarchical structure, more information is needed on finding cost-effective methods of providing valuable performance feedback to employees. Studies conducted in organizations regarding the effectiveness of various feedback processes would be useful for HRD professionals facing decisions on the choice and implementation of such systems.

This study also raises questions that might be explored by additional research on multi-source feedback process design. Should direct supervisors' contribution be weighted more than that of other contributors? How should raters be chosen? What expense is involved in training raters? How satisfied over time are employees with multi-source rating systems? What are the legal implications of having multiple people involved in the performance evaluation process?

Continued empirical studies will provide information helpful to organizations facing important and expensive performance feedback systems decisions.

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Appendix
Mean and Standard Deviation for Employees Perceptions Regarding a Single Source (Pre) and
Multiple Source (Post) Performance Appraisal Process in a Loosely Coupled System

<i>Statement by Pre/Post Assessment</i>		<i>Loosely Coupled N=61</i>		<i>Tightly Coupled N=57</i>	
		<i>*Mean</i>	<i>S.D.</i>	<i>*Mean</i>	<i>S.D.</i>
5. I like the current performance appraisal process.	PRE	3.0	1.4	2.7	1.2
	POST	3.7	1.2	3.3	1.0
6. The performance appraisal process provides useful information I can use to improve my performance.	PRE	3.7	0.9	3.4	0.9
	POST	3.7	1.1	3.5	0.9
7. I understand how the performance appraisal form is developed.	PRE	3.3	1.4	3.2	1.4
	POST	3.5	1.2	3.6	1.0
8. The rating form is easy to use.	PRE	3.9	0.9	3.4	1.0
	POST	3.9	1.0	3.7	0.8
9. The evaluation process provides information that will help me improve my performance.	PRE	3.7	1.0	3.6	1.0
	POST	3.8	1.0	3.6	0.9
10. I have confidence (trust) in the rated results.	PRE	3.5	1.2	3.1	1.2
	POST	3.8	1.1	3.6	0.8
11. I believe the results are used fairly for the following personnel decisions:					
a. Recognition	PRE	3.3	1.5	2.9	1.4
	POST	3.3	1.5	3.3	1.1
b. Promotion	PRE	2.9	1.7	2.3	1.5
	POST	2.8	1.7	2.9	1.4
c. Training	PRE	3.2	1.7	2.7	1.5
	POST	3.0	1.7	3.3	1.2
12. This performance appraisal system promotes teamwork.	PRE	3.4	1.2	2.9	1.2
	POST	3.2	1.3	3.2	1.0
13. This evaluation process provides safeguards that lessen effects of politics and favoritism in my rating.	PRE	3.6	1.1	2.9	1.3
	POST	3.6	1.2	3.5	0.9
14. I understand how the evaluation process works.	PRE	3.4	1.3	3.5	1.1
	POST	3.5	1.2	3.7	0.9

<i>Statement by Pre/Post Assessment</i>		<i>Loosely Coupled N=61</i>		<i>Tightly Coupled N=57</i>	
		<i>*Mean</i>	<i>S.D.</i>	<i>*Mean</i>	<i>S.D.</i>
15. This evaluation process aligns the organization's quality principles with its mission and values.	PRE	3.6	1.2	3.0	1.3
	POST	3.5	1.2	3.4	0.9
16. The evaluation process improves cooperation with my co-workers.	PRE	3.4	1.2	3.0	1.2
	POST	3.3	1.3	3.4	0.8
17. The rating results help me better serve my customers.	PRE	3.7	1.1	3.4	1.1
	POST	3.7	1.2	3.5	0.8
18. This evaluation process increases communication between myself and my supervisor.	PRE	3.7	1.0	3.5	1.0
	POST	3.6	1.2	3.5	0.9
19. This evaluation process reflects a complete assessment of performance.	PRE	3.6	1.1	3.1	1.1
	POST	3.7	1.0	3.6	0.8
20. This evaluation process reflects the importance of quality to my employer.	PRE	4.0	0.8	3.4	1.1
	POST	3.7	1.0	3.5	0.8
21. This evaluation process motivates me to increase my effectiveness.	PRE	3.9	0.9	3.4	1.2
	POST	3.7	1.0	3.6	0.7
22. This evaluation process reflects an accurate assessment of my supervisor's expectations.	PRE	3.6	1.1	3.3	1.2
	POST	3.7	1.1	3.6	0.8

Note. Questions 1-4 related to demographic information. See paragraph under the heading Sample for a description.

**Importance Scale: N = I do not know; 1 = Strongly Disagree; 2 = Disagree; 3 = Neither Agree/Disagree; 4 = Agree; 5 = Strongly Agree.*

An Exploratory Examination of the Literature on Age and HRD Policy Development

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The literature on older workers was examined to identify themes related to workers who remain, return, or retire from the workplace. Four databases were searched producing five hundred twenty three abstracts. Four themes were generated: retirement is an outdated notion, the importance of older workers to organizations is changing, older adults are active agents negotiating employment decisions, and career development programs are a worthwhile societal investment.

Key Words: Age, HRD Policy, Older workers

HRD and adult education practices for older workers should be situated in a dynamic pattern of periods of active employment, disengagement from the workplace, and re-entry into the same or a new career. The workplace becomes a dynamic space for older workers rather than a unidirectional journey leading to retirement. The roles, depending on life circumstances, might include the decision to remain in, retire from, or return to periods of part time, full time, or part season work. These work choice patterns will challenge adult educators and HRD practitioners and scholars to develop training, career development, and organizational development strategies appropriate to a third stage of working life.

This analysis views older workers as a differentiated employee group with different workplace issues suggesting an HRD framework combining functions with employment patterns. Table 1 combines the three components of HRD: training and development, career development, and organizational development with the three working patterns of remaining, returning, and retiring. A remaining worker meets the retirement qualifications of age and years of service but has chosen to continue working in a full or part-time capacity without a break in service. A returning worker has ended active paid work, experienced a period of retirement, and returned to a paid position. A retiring worker meets the age and service requirements electing to leave current work with no intention of returning. In each intersection a question is raised to assist the HRD practitioner evaluate issues of age during policy development (Stein, Rocco, & Goldenetz, 2000). The framework is useful for positing various issues in each of the blocks. This paper's purpose is to review selected literature from the fields that inform adult education and human resource development to determine how the phenomenon of older workers is treated. We define older workers as 55 years old because according to Hale (1990) in the next decade, workers over the age of 55 may exceed the number of new entrants into the workplace.

Table 1: Age and HRD Policy Development Issues to Consider

	T&D	CD	OD
Remaining	Is age discussed as a diversity issue?	Are there opportunities to change jobs within the organization?	Are there implicit barriers to promoting older workers?
Retiring	Are there learning opportunities to prepare for retirement?	Is there opportunity to prepare for life after this workspace, career, or job?	Are there policies to permit flexible employment patterns for gradual disengagement?
Returning	Are there training programs to assist with re-entry into the workplace?	Are investment made in skill development for future employment?	Do policies facilitate and or actively recruit older workers to the workplace?

(Stein, Rocco, & Goldenetz, 2000)

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Method

The purpose of this project was to examine the literature on older workers to determine the themes and issues over time exploring interaction of demographic shifts, workplace needs and values, and older workers who remain, retire, or return to the workplace. To what extent does the literature address career development issues, organizational development concerns, and/or training and development needs of older workers? Four databases from three disciplines, education, business, and psychology, were searched. They were Educational Resources Information Center (ERIC), Education Abstracts, ABI/Inform, and PsychINFO. Descriptors used were retirement, retiring, job training, training, employment practices, retraining, career development, organizational development, returning and remaining combined with older worker. Searches were limited by country (United States). All databases and each descriptor set were searched by date-- 1980 to present and 1979 and before. All database searches were done on May 25, 26, and June 2 (Table available upon request).

The ERIC search produced 898 records; 164 abstracts were selected for review. The Educational Abstracts search produced 10 records; 7 abstracts were printed. The ABI/Inform search produced 510 records; 254 abstracts were printed. The PsychINFO search produced 186 records; 98 abstracts were printed. A total of 523 abstracts were included in the review. Differences in numbers of records found in each database can be explained by the different purposes of the databases and the year each began to compile information. ERIC began collecting materials in 1966, PsychINFO in 1967, ABI/Inform in 1971, and Educational Abstracts in 1983. Educational Abstracts focus is primary and secondary education making it understandable that little would be found there on older adults.

Table 2: Search Results

	Total database count when searched	Total Number of records	Total Number of abstracts selected	Total Number of articles to be pulled
ABI/Inform Global	1,833,334 (June 2, 2000)	510	254	52
Education Abstracts	496,719 (May 31, 2000)	10	7	0
ERIC	1,023,165 (May 26, 2000)	898	164	34
PsychInfo	1,356,988 (May 25, 2000)	186	98	57
Total	4,710,206	1,604	523	143

The next step was to review the abstracts and categorize them (a) by date, (b) type of journal (academic, popular, and practitioner), (c) HRD classifications (career development, organizational development, training and development), (d) deciding also if the article pertained to remaining, retiring or returning, (e) emergent trends and issues, and (f) how older workers are defined. Citation records were sorted according to the degree of fit we felt each had to the nine areas in Table 1 and labeled accordingly under the three HRD classifications with the individual decision step of remaining, returning, or retiring.

Themes were identified following procedures for thematic analysis and code development (Boyatzis, 1998). Boyatzis (1998) suggests five procedures for inductively generating themes from a data set. Procedure one is to reduce the raw information by extracting the salient features of the data. In this study, abstracts were reduced by writing a description of findings or thesis. In a second column, the researchers' observations about the abstract or groups of abstracts were written. Each researcher was assigned a database. Procedure two was to identify inductively themes within a sample. Each database was considered a sample of the possible literature. The unit of analysis was the abstract. Approximately ten percent of the entries from each sample were selected to determine preliminary themes and to develop the coding procedure for the full database. This task was assigned to one research team member. Other team members would be used for a consistency check. Themes were inductively generated from the summary statements and reflections. The third procedure compared themes across databases to determine any differences in the themes. The databases differed only in the proportion of articles addressing a theme. For example, more articles focusing on career development were found in PsychINFO than in ERIC. However both databases addressed the importance of career development for older workers.

Procedure four was to create a code set. A code has a label, a definition, and indicators. In this study the theme of retirement as an out-dated notion was created in the following manner: (a) label: working across the lifespan; (b) definition: older workers will seek employment beyond the traditional age of retirement; and (c) indicators: statements indicating alternative work arrangement to full time employment, economic necessity, and social strategies for reducing the retirement burden on future workers. Indicators provide guidance on how to recognize the theme in a unit of analysis.

The fifth procedure was to check for consistency of themes among the researchers. To determine the consistency between the primary coders' judgments and the intuitive judgments of the other research team members, the researchers discussed themes through electronic mail, telephone, and in person meetings. The last procedure was to apply the codes to the entire database. All abstracts were coded and refinements made to the themes continuing to emerge from the data.

Findings

Date

During a preliminary search little was found before 1979. The hypothesis was that this would change as baby boomers aged and became older workers. The first baby boomers would attain age forty in 1985. The number of articles written in 1985 was greater than in all other years, at thirty-six. In 1985 eighteen articles were written on training and development issues and eight on career development issues (which tied with 1995). In the area of organizational development the most articles written were in 1981 at twenty (thirty total for all three areas).

We divided our search to before 1979 and after 1980. Prior to 1979 the PsychINFO database contained 19 abstracts. ABI/Inform contained 27 abstracts. ERIC contained 193 abstracts. The number of records found prior to 1979 in ERIC can be partly explained by funding and interest being stimulated by the Comprehensive Training and Employment Act, and the Age Discrimination in Employment Act. The ERIC database produced a greater number of records but a smaller percentage of abstracts compared to the other databases. This was the result of many being international in nature, addressing unrelated issues such as social security systems, conference proceedings, or duplicate records. The number of abstracts selected 523 (Table 3) was reduced further as we found duplicate abstracts, abstracts written about countries other than the United States, and that some selected abstracts did not fit into the HRD categories.

Table 3: Search Results by Date

	Records		Abstracts selected	
	Post '80	Pre '79	Post '80	Pre '79
ABI/Inform Global	483	27	251	3
Education Abstracts	10	0	7	0
ERIC	704	194	164	0
PsychINFO	167	19	97	1
Total	1,604	240	523	4

* A prior decision had been made not to read anything written before 1980. However, we did look at relevant abstracts prior to 1979.

Age of an Older Worker

There appears in the literature considerable variation in the concept of older worker. The term older worker extends from forty years to 75 years of age. The first mention of age was from an ABI/Inform Global abstract in 1973. It is interesting to note the author's concern, "Eliminating the mandatory, arbitrary retirement-at-65 rule. Involuntary unemployment in a great and rich nation like ours is a moral wrong which should not be tolerated" (Foegen, 1973). When workers as young as 40 were mentioned it was because of (1) the formation of retirement decisions (Rosen & Jerdee, 1986), (2) the decline in training opportunities (Cooke, 1995; Rothstein & Ratte, 1990), (3) dispelling myths about age (Kaeter, 1995), and (4) needing these older workers to stay on the job to mentor younger workers (McShulskis, 1997b). When the ages 70 and 75 years are discussed it is in terms of (1) preretirement involvement (Evans, Ekerdt, & Bosse, 1985), (2) being in demand because of their experience (McShulskis, 1997b), (3) gradual work reduction and training for alternative careers (Salomon, 1982), and (4) the small numbers of septuagenarians in the workplace suggesting workers do not feel they should still be working (LaRock, 1997).

Type of Article

Academic articles were articles published in scholarly journals. Practitioner articles were published in journals and magazines aimed at working professionals and were not peer reviewed. Popular articles were publications meant for the general public. Most of the ERIC abstracts were government reports, advocacy or apologist articles (such as AARP), and program reports. We identified few scholarly, conceptual or empirical research pieces. The majority of articles in the full database could be

described as written for popular or professional publications. Approximately thirty percent of abstracts were from academic journals or had an empirical focus. More academic articles were found in the ABI Inform database. Education Abstracts focused more on issues related to primary and secondary education. This explains why so few articles were found there on older adults.

Table 4: Type of Article by Database

Type of Article	ERIC		Education Abstracts		ABI/Informs		PsychInfo		Total
	<i>Pre-79</i>	<i>Post-80</i>	<i>Pre-79</i>	<i>Post-80</i>	<i>Pre-79</i>	<i>Post-80</i>	<i>Pre-79</i>	<i>Post-80</i>	
Academic	0	26	0	6	0	48	1	92	173
Practitioner	0	0	0	0	1	171	0	6	178
Popular	1	24	0	1	0	14	0	0	40
Others	0	16	0	0	0	0	0	0	16
Total	1	66	0	7	1	233	1	98	407

HRD categories

Abstracts were classified as organizational development, career development, and /or training and development and worker status i.e. remaining, returning, and retiring. The categories were not mutually exclusive. Abstracts on policy concerns, attitude shifts, flexible and innovative work scheduling, etc. were considered under organizational development. Abstracts on career counseling, second career alternatives, etc. were named career development, and articles on adult learning, training strategies, etc. were called training and development. The breakdown of the abstracts was: 46% organizational development, 38% training and development, and 15% career development. The distribution on work status was 56% remaining, 30% returning, and 14% retiring. Pre-retirement or retirement concerns from an organizational perspective were noticeably absent. However, the literature supports the notion that in the seventies there was greater interest in pre-retirement and retirement issues. The literature of the past twenty years seems to concentrate on retaining older workers and addresses policy, attitudinal, and training issues to keep older workers in the workplace.

Table 5: Abstracts sorted by HRD Category and Remaining, Retiring, and Returning

(Post-80)	Training Development	Career Development	Organizational Development	Total
Remaining	110	28	121	259
Retiring	9	12	34	55
Returning	52	29	52	133
Total	171	69	207	447

Themes

First, retirement for future older workers is an outdated notion. A noticeable shift in the literature during the period 1980-2000 is a change in the conception of retirement. From an organizational and societal perspective, the issue is not how to assist older workers retire and use leisure time but how to retain and recruit older workers. Recruitment and retention (Levine, 1988) becomes a key policy issue to satisfy the increasing demands for productivity, worker shortages, and retaining corporate knowledge (Alegria, 1992; Crampton, 1996; DOL, 1989; Kindelan, 1998; National Alliance of Business, 1996; Ohio State Bureau of Employment Services, 1996; Rosen & Jerdee, 1986; Wolfbein, 1988). From a national perspective these issues are addressed: policy designed to ease the social security burden, (Anonymous, 1982; Cowans, 1994) age discrimination (Perry, 1995), and re-employment and continued employment of older workers (New York State Office for the Aging, 1997; O'Donoghue, 1998). By keeping older workers employed the burden on retirement systems will be reduced (Reynolds, 1994). Older workers will cycle in and out of periods of active employment. Work will become an integral part of living (Bird, 1983; Geer, 1997; Kotteff, 1998; Stalker, 1995). Incentives are needed to encourage older adults to retire later (Copperman & Keast, 1981; Eastman, 1993).

Second, organizations are experiencing an attitudinal shift seeing the value and importance of training older workers. A focus for the literature of the 80's and early 90's is on convincing employers that older workers are capable of learning. Advocates for employing older workers such as AARP (1993) produced training manuals for teaching human resource development managers how to plan and provide training programs to maintain, enhance, or update the skills of remaining and returning workers (Allen & Hart, 1998; Ennis-Cole & Allen, 1998; Poulos & Nightingale, 1997). The literature advocates employing older adults on the basis of new physiological and educational research implying that the ability to learn is not necessarily diminished by age (Chirikost & Nestel, 1991). By implementing ecological changes in training and workplace design the productivity of older adults can be enhanced (Labich, 1996; Sterns & Miklos, 1995). The literature of the 90's begins to view older adults as assets in terms of work ethic, reliability, accuracy, and stability (AARP, 1991; Catrina, 1999; Kaeter, 1995; Rothstein & Ratte, 1990). There is still an apologetic tone in that the literature is still trying to convince HRD managers and workplace supervisors that older workers are a sound investment (Catrina, 1999; Sullivan & Dupley, 1997). The literature shows that myths about aging still persist (Itzin & Phillipson, 1994; Kaeter, 1995; Lefkovich, 1992; McShulsksis, 1997a; Yeatts, Flots & Knapp, 1999).

Third, older adults are active agents negotiating decisions to remain or return to the workplace. Literature on older workers exhibits this tension. Some literature characterized older workers as objects to be retrained or recruited by simply creating more flexible work schedules. The popular and professional literature addressed human resource development managers about older workers and did not consider older workers agents in the process of retraining or reentry to the workplace. Instead, older workers need to be managed (Anonymous, 1990; Elliott, 1995; Johnson & Johnson, 1983). A second and more recent view is that of the older worker making a decision to return or remain in the workplace based on availability of training, need to be engaged, or wanting to develop a second career (AARP, 1992). Older workers become subjects of their own work experience and actively make choices about work and workplaces. Older workers are seen as entrepreneurs beginning new businesses and hiring other older workers (Institute of Lifelong Learning, 1983; Miner, 1999). Older workers are seen as wanting to develop new skills throughout life (Tucker, 1985). Managers are advised to create meaningful work and to consider the role of work in the lifestyle of an older adult (Fyock, 1994). States should have planning processes to expand meaningful work and to help create work environments attractive to older adults (NYS, 1997). Absent from the literature are articles dealing with the re-entry problems of women and minorities. The literature does provide testimony to the problems that mid-life (defined as 35-54) and older women have in seeking job assistance and enrolling in training programs (Chalfie & Dodson, 1996; DOL, 1993; Joint Economic Committee, 1983).

Fourth, career development programs for older adults are a worthwhile societal investment (Newman, 1995). The literature of the 90's begins to introduce the value of career counseling for older adults. Community colleges and community agencies have a role in providing advocacy for employment, counseling, and developing new workplace skills. Partnerships among community agencies, educational institutions and employers are suggested as an integrated approach to retraining and for providing re-entry for older workers (Beatty & Burroughs, 1999; Burriss, 1995; Caro & Morris, 1991; Choi & Dinse, 1998; Denniston, 1983; Mor-barak & Tinan, 1993).

The notion of older worker as a resource is expressed in the literature in four phases. The older worker is addressed as a resource that can be retired after a useful working life. The older worker as a "retrainable" resource seems to occupy much of the literature as older workers are seen as necessary to the workforce. A third image of the older worker as a recruitable resource seems to become more important as the need for an experienced and flexible worker becomes a more prominent social and organizational issue. Lastly, the older worker as a retainable resource emerges as organizations compete for older workers who have more career options due to the growth of the service/information economy.

Policy and Further Research Implications

The literature on older workers begins to shift from concern for developing the individual worker perspective to that of societal concerns for engaging a significant component of the population in work. Increasing needs for productivity, financial strains on retirement systems, and a changing demographic structure are increasing the interest in older workers.

The literature tends to treat the older worker as an object of the work experience. Articles are directed to HRD managers, adult educators, and other community professionals to either consider employing, training, or advocating on behalf of the older worker. The concerns are more about designing and implementing training programs and policies for older adults than about the needs, concerns, and work aspirations of remaining and retiring workers. Literature is directed toward convincing employers that investments in older workers will be returned in improved productivity.

From an organizational policy perspective it appears that training and development issues seem to predominate the literature. A consistent theme has been the examination of how training of both management and older workers might create a more age diverse workplace. Programs focusing on retirement may be more concerned with preparing for future employment rather than complete disengagement. Training programs to prepare for re-entry are not discussed as often as opportunities to remain employed.

From a policy perspective, the literature indicates concern with barriers to continued employment as well as returning to the workforce. An examination of retirement incentives needs to be balanced against the need to recruit and retain older adults in the workforce. Employers are addressing flexible work schedules as well as policies such as elder care to attract and retain older workers. Noticeably absent in the literature are studies looking at the work strategies of women and minorities. The literature does address the difficulties women face in receiving job training and placement. However, policies and training programs that take into account life circumstances encountered by women and minorities are not present in the literature.

From an individual perspective, career development as an investment strategy just begins to become a theme. Community agencies are asked to make investments in the training and development needs of older adults. Older adults are seen as decision makers choosing when and where to return to the workforce. Investments in developing new skills for older workers is seen as a strategy for improving productivity as well as the quality of life for older adults. Adult educators especially in the role of trainer or administrator can become advocates for employing older workers, for creating meaningful work opportunities, and for addressing issues of ageism in the workplace. Helping older adults to consider second or even third careers, adjust to new technologies, and modify workplace ecology can become tasks for the adult educator.

The literature represents a retrospective view of events. To what extent are community, corporate, and governmental organizations confronting the issues and trends described? How are employers modifying the work environment and how are older adults reacting to increased interest in their skills and abilities? These are questions to consider for further research.

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