

Gardens for All Supply Company: Older Workers as a Tactical Advantage for Business

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Please note: All company and individual names in this case are fictional.

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GARDENS FOR ALL SUPPLY COMPANY CASE STUDY

Instructor Notes

The Gardens for All Supply Company (GASC) case can be used as a teaching tool in multiple ways after completing Learning Module 9 of the Workforce Planning: Aging and Employment Course.

1. The case and one or two questions can be used as part of an exam on this section of the course. (Instructors can use different questions, so they can use the case multiple times without fear of file sharing.)
2. The case can also be used for in-class discussion. Depending on enrollment, the class can be broken into teams with each team addressing one question. Another approach would be for each team to take the role of one of the partners or one of the advisory team members. Teams can then be asked to identify and write up the issues from their perspective and to present their position(s) in a mock company meeting.
3. The case can be introduced after Module 4, and appropriate questions can be identified for class discussion to accompany Modules 4-9.
4. The case can also be used as part of the final exam without asking specific questions and graded on the basis of students' ability to identify the issues and present possible solutions.

COMPANY BACKGROUND

Gardens for All Supply Company (GASC) was founded in 2008 by four college roommates, two with degrees in biology and environmental sciences and two with degrees in business. Brian, Mattie, Tom and Sam met during their summer job at Williams Nursery, a local farm that grows and sells a variety of flowering plants, small decorative shrubs, trees and vegetables to the surrounding community. The Williams family had given up their traditional dairy farming business years ago and now has a well-established, profitable business with an excellent reputation and customer base.

Brian, the grandson of the owners, was interested in expanding the family business. He proposed the idea of GASC to his college roommates after graduation. GASC would focus on providing environmentally friendly supplies and basic tools needed to be a successful gardener. It would complement his grandparents' existing business, and his grandparents were eager for Brian to remain part of the family business and move it forward. The four partners made an arrangement with Brian's grandparents to "rent" space on their farm to start their own separate business to sell their supplies and tools.

The partners agreed that GASC's mission was to provide the necessary tools and supplies to create bountiful gardens backed by the assurance of 100 percent customer satisfaction. The new partners enjoyed the trust, loyalty and "100 percent customer satisfaction" guarantee already established by Brian's grandparents over the last 20 years. GASC grew rapidly with this proven reputation and customer base.

The business developed steadily for the next two years, and the partners added employees as needed, especially during the spring and summer months, when business was at its peak. They also created a website with an online catalog to expand their customer base and increase sales. By 2010, GASC employed 27 full-time and 33 part-time employees. Most of these employees were local relatives or friends who either had retired from full-time work or had a love for gardening. The partners had a personal connection with many of these employees and knew they were committed to their vision of 100 percent customer satisfaction. The partners held monthly meetings and activities for all employees to reinforce the company's vision, update them on the business and reward employees.

GASC enjoyed continued growth and success, and it became necessary to expand again to meet customers' demand for additional products. The expansion included adding a new year-round retail location downtown and a small warehouse built on the farm's property. The retail store also housed GASC's customer service employees.

THE CASE

GASC, which started with four full-time employees, gradually grew to 57 full-time and 33 part-time employees, reaching 90 employees by the end of 2012. The average age of all employees was 47.

	FTEs	PTEs	Avg. Age of FTEs & PTEs	Company Growth Notes
2010	27	33		Startup
2012	57	33	47	
2013	74	33	32	New warehouse
2014				New internal processes

GASC's hiring and training had been successfully accomplished informally by the four owners and through family and friends, all of whom had some knowledge of and commitment to gardening. Turnover was well below 10 percent. By the end of 2013, GASC had added 17 employees, including 14 in customer service and three in the warehouse. The employee population was now 107 employees, and the average age was 32, which reflected the company's focusing its recruiting efforts at local colleges and career fairs. Although the partners had the overall authority and made the key management decisions for the company, they had allowed several of their more skilled employees to act as lead employees for each functional area—customer service, retail, purchasing and warehousing—without structured, assigned roles. This informal approach to the management structure had worked well in the past because the partners were able to stay in touch with all staff members each week while keeping their focus on the company vision. There were also informal monthly gatherings that kept the employees engaged and focused on the vision and goals of the company.

The partners eagerly planned for their 2014 expansion, which would require 12 additional staff members for customer service and the new retail location. This expansion would include new product lines and an overdue improvement to the company's inventory and shipping processes. The partners also estimated that at least two additional employees would be needed in the warehouse, expanding the staff to 121 employees.

Mattie informed her partners that several other local businesses were also in the process of growing their customer service departments and that GASC had lost several employees to these new companies. The partners were concerned this would affect their ability to recruit new and retain existing employees. They also acknowledged that finding employees with gardening knowledge might not be as easy as it had been in the past. During the last two months they had lost four of their long-term customer service employees, and they were unclear why these experienced employees had left. The partners recognized the critical need to fill staff openings to cover the additional customer service and retail hours. There had also been an increase in customer returns for incorrect items, indicating that the new employees

needed more training, that there was a problem in the warehouse's shipping department or both.

The partners met to discuss what their strategy should be to expand effectively. They identified the following expansion goals:

- Establish a consistent training program focused on the commitment to the vision of the company's 100 percent customer satisfaction guarantee.
- Attract and retain employees with superior customer service skills and preferably with gardening experience.
- Identify and resolve the factors contributing to increased turnover and reduce the costs associated with this issue.
- Determine customers' primary complaints about GASC's service and products to explain the numerous returns and minimize possible future decreases in the company's profitability.

GASC PARTNER PROFILES AND BUSINESS ISSUES RELATED TO THE EXPANSION

Brian Williams, partner

Brian is responsible for GASC's general operations, including supervising the manager of sales and marketing. In the last four months he has focused his efforts on expanding the business. As a result, Brian has learned from his grandparents and several loyal customers that GASC is not upholding its 100 percent customer satisfaction guarantee. It is evident that the company needs to identify why its customer satisfaction is eroding and contributing to declining sales.

Brian trained all employees in the past, but with his focus on the expansion and not on training, coupled with the increased number of new hires in the last year, he decided he no longer had the time to devote to training. Brian assigned training to several of the recently hired, highly motivated and promising college graduates who reminded Brian of his partners and himself when they started the business. Brian did not provide a training plan but simply asked each of the employees to train the new hires on their daily work responsibilities in the customer service and retail departments. As a result, customer service employees were not consistently trained with the same understanding of and commitment to the company vision and performance expectations, especially the guarantee of 100 percent customer satisfaction. Brian had also dropped the company monthly social gatherings due to his shifting priorities.

Mattie Cromwell, partner

Mattie is responsible for operations and hiring in the customer service and retail departments. She is having difficulty finding new employees because several new start-up companies in the area are presumably offering more money and better

benefits. She knows it is important to hire people with gardening knowledge for the customer service department but thinks she has exhausted all her resources. In the past five years, GASC has experienced low turnover at an acceptable rate of less than 10 percent. With several recent departures, however, not only is turnover more than 10 percent in the customer service and retail departments, but two employees with seniority left to work at larger companies, each with a more robust benefits package and better work schedule.

Mattie believes the company's wages are at market rate and is aware that the benefits package is lacking, but she has no data to support this conclusion. To attract new employees in the last several months, Mattie has offered new hires a higher wage, equal to or more than what several current employees earn.

In addition, four of the company's older key customer service employees have notified her that they are considering retirement. Mattie further notices that four of the new hires are regularly late to work and have high absenteeism. She has also received several customer complaints concerning the behavior of these employees. Customers have complained that these employees were not patient with them when they placed their orders, and in several cases, the customer received an incorrect item. She suspects that the behavior of these newer employees is partially responsible for the erosion of what was once a positive and friendly work environment and is contributing to the higher rates of turnover. Most of the older, more experienced workers do not require much supervision, so Mattie is not sure what all the issues are in her area. She knows, though, that the volume of customer complaints has doubled in the last year, along with a higher return rate on orders.

Sam Summers, partner

Sam is in charge of inventory, purchasing and working with Mattie to establish the product lines for the GASC catalog. Sam is finding his time limited because of the increased work necessary to maintain two locations. This is further complicated by the growing problem of keeping an accurate inventory, especially with the increase in returned merchandise. In the past Sam could handle most of the inventory work with one full-time employee, but he recently added two new employees to help keep a handle on the inventory.

Tom Torrez, partner

Tom focuses on information technology, purchasing and finances for the company.

What's next?

The partners know they need to quickly identify and resolve the issues in the customer service and retail departments, including filling open positions, preferably with reliable employees who have gardening knowledge; reducing the rate of customer returns; and fixing any inventory issues. They also need to think about the company's organizational structure and create several leadership positions because it is no longer possible to focus all their time on the operations of the business.

More importantly, Brian, Mattie, Sam and Tom feel that the core issue is the lack of understanding and focus of the employees on the firm's commitment to 100 percent customer satisfaction.

STRATEGIC PLAN FOR EXPANSION

GASC will have a difficult time expanding unless the problem of declining sales is addressed. In addition to gathering external information about market trends and customer feedback, the partners need to create a strategic plan to address internal factors such as the recruitment and retention issues, customer service quality, inventory accuracy, and employee understanding of GASC's commitment to 100 percent customer satisfaction. They appoint three experienced employees from the business areas experiencing these challenges to meet and work with the partners to make specific recommendations to address the problems in the next four weeks. It is also possible that one or all these employees can potentially take on the new leadership roles needed in the company.

KEY TEAM MEMBERS

Pam Santiago, customer service

Reports to Mattie Cromwell, partner

The partners wanted someone on the team who had been with the company in the start-up years, was a high-performing employee, had an understanding of the training, and held a valuable perspective of what was working well in the department and what needed improvement. Pam had worked part time for Brian's grandparents for 10 years before joining GASC and was an accomplished, avid gardener. The partners wanted Pam to work with them in their new business, and after six months, they convinced her to work full time for them.

Pam personally knew and serviced the company's top 100 customers from the beginning of her employment and was clearly an asset to the company. Unfortunately, Pam was one of the customer service employees who told Mattie that she planned on retiring at the end of the month. The partners knew they would need to find a way to improve the working environment and convince Pam to stay.

Pam and her co-worker Sara, the other excellent employee who told Mattie that she would retire at the end of the month, had noticed a distinct shift in employee commitment by employees hired in the past year, the lack of appropriate training for new employees and the change in company culture. This culture change became particularly evident after the partners stopped holding informal and formal gatherings to recognize and celebrate employees' contributions to the growing company. These meetings had also been used to introduce new staff and to educate all employees about the products recently added to the inventory. Now Brian's selected team delivered that training monthly. Pam felt that the monthly training was not timely enough to keep employees informed about the new products added to inventory weekly. Pam did not feel it was appropriate to comment on the training

program, though, because she had heard that the partners thought the new training team was outstanding. The final concern that contributed to Pam and Sara's retirement announcements was that they learned that Mattie had hired several new employees "with experience" at higher wages than they and several of the other employees with seniority received for doing the same job.

The partners were unaware that eight additional top customer service and retail employees who had been with GASC since its inception also planned on retiring during the next year and had concerns similar to those of Pam and Sara. If they retired as planned, the company would lose 10 employees with more than 50 years of combined experience.

Mac Stone, warehouse

Reports to Sam Summers, partner

Mac was appointed to the team because of his experience successfully operating the warehouse when only Sam and he worked there. Mac is also the one to identify any serious issues with the operation. Sam is concerned that Mac has seemed somewhat disengaged in the business in the past four months and hopes this increased responsibility and recognition will reengage him.

Mac is actually Brian's grandparents' oldest friend and began working as a favor to Brian's grandparents when they started their nursery and gardening business more than 10 years ago. Mac does not say much, but he understands the warehousing business. Mac has been disappointed in the last year with the addition of two new employees who are younger and do not interact with him. They only listen to Sam, who, in the last four months, has not been in the warehouse often enough. Mac is aware that many of the original proven procedures are either being forgotten or ignored. Mac suspects that this is probably creating shipping errors and loss of accurate inventory tracking when an item is returned.

Shelia Torrez, retail stores

Reports to Brian Williams, partner

Shelia is Tom's aunt, and she successfully opened the retail store four years ago. Shelia has excellent instincts on what sells. The partners chose Shelia for the team because of her success in that role. They also know that she has been dropping hints that she may retire. Although they would prefer that she stay three more years to train a replacement, they want to capture her valuable knowledge of the retail operation.

Sheila had retired early from a previous position and did not really need to work, but her love for her nephew and for gardening—she is a certified master gardener—enticed her back into the working world. Lately, she has been questioning her decision to work full time, especially with the increased turnover. The lack of trained and committed employees has placed additional work on the remaining employees in the retail and customer service departments and has made her job much more

difficult. The last four employees who were hired and trained by Brian's trainers were not aware of the company's 100 percent customer satisfaction guarantee and had little knowledge of gardening. In fact, these new employees seemed more interested in when they could take a break and go across the street to the local coffee shop.

Shelia has decided that she would work on this last project with the partners and then leave the company.

CASE QUESTIONS

Summary question: GASC wants to expand its business, and the partners need to find the right kind of workers. They are having difficulty finding talent, and they are losing experienced, older workers in crucial customer relations positions. The partners overlook the contributions and underutilize their older employees. The partners decide to ask several of their older workers for recommendations and conclude that the loss of several of these individuals could potentially damage their business further. Do you agree that older workers can convey the company's values to new hires, serve as role models for workplace behavior, be mentors in knowledge transfer to younger employees and provide a ready resource for periodic workforce projects? How would you make this case?

1. Analyze how Pam, Mac and Shelia are reacting to changes at GASC. What are the issues for each?
2. What work schedule options should Mattie explore to retain her older, more experienced, high-performing customer service employees who are considering retirement? Mattie needs to prepare a list of benefits options she can use in conversations with these customer service representatives to encourage them to continue working for GASC. What options should be included?
3. What could be added to the benefits package to attract and retain older employees?
4. What are the mentoring possibilities in this case study that would improve the quality of service from new employees and retain older workers? Why should mentoring be considered as an option?
5. How does the Equal Pay Act of 1963, the Age Discrimination in Employment Act of 1967 (ADEA) and the Lilly Ledbetter Fair Pay Act of 2009 fit into the compensation issues in this case study?
6. What new career options (advancement, role changes) could be created to retain and preserve the knowledge of the more experienced workers who are considering leaving?
7. How can the partners improve the gardening knowledge of new employees? Where should they look?
8. How could the company retain the knowledge of experienced employees?
9. What tax credits or training programs are available to the company?
10. What types of low-cost policies and activities could be added to engage older workers and to demonstrate that the company values them and encourages them to stay employed?

QUESTIONS: ANSWER KEY

Summary question: GASC wants to expand its business, and the partners need to find the right kind of workers. They are having difficulty finding talent, and they are losing experienced, older workers in crucial customer relations positions. The partners overlook the contributions and underutilize their older workers. The partners decide to ask several of their older workers for recommendations and conclude that the loss of several of these individuals could potentially damage their business further. Do you agree that older workers can convey the company's values to new hires, serve as role models for workplace behavior, be mentors in knowledge transfer to younger employees and provide a ready resource for periodic workforce projects? How would you make this case?

Employers have a practical business need to recognize the value of older workers in the workplace as an expansion of their talent pool and as contributors to a more profitable organization. The benefits of hiring and retaining older workers are numerous to an organization. Older workers, 55 years of age and older, may have years of experience and knowledge that companies do not want to see walk out the door. Older workers offer an excellent resource for mentoring, role modeling, serving as temporary resources for project work, and supporting a company's vision and values. Older workers often have assets not taught in school, such as less absenteeism, the ability to handle change, higher motivation, longer retention and the willingness to accept part-time work. These assets contribute to a more productive and positive workplace. The older workers in this case study performed well with little supervision, were motivated to do their best in their jobs and waived only when the partners did not recognize some of the typical issues that arise when a business grows rapidly. Many factors will contribute to the success of GASC's expansion.

1. Analyze how Pam, Mac and Shelia are reacting to changes at GASC. What are the issues for each?

This question is intended to encourage students to think about employment issues from the older worker's perspective. The changes Pam, Mac and Shelia are reacting to include the following:

- Loss of influence and power.
- Loss of voice.
- Loss of collegiality.
- Loss of work ethic.

2. **What work schedule options should Mattie explore to retain her older, more experienced, high-performing customer service employees who are considering retirement? Mattie needs to prepare a list of benefit options she can use in conversations with these customer service representatives to encourage them to continue working for GASC. What options should be included?**

The list may include the following benefits options that GASC should consider offering employees:

- **Flexible work schedules.** This option allows employees to plan activities and to take care of personal needs during the week without the stress of completing all personal tasks in the evenings or on weekends, and it reduces the necessity of requesting time off.
- **Part-time work schedules.** This option allows employees to meet other personal needs during the day, to enjoy long weekends and to transition into retirement.
- **Job-sharing.** This option allows several employees to “share” a full-time position.
- **Snow bird program.** This option allows employees to “winter” in another desired location and later return to their original position.
- **Telecommuting.** This option allows employees to work from home for part or all of their work hours.
- **Consulting.** This option allows employees to work on consulting projects as needed.

3. **What could be added to the retirement and insurance benefits package to attract and retain older employees?**

GASC could add the following benefits:

- Retirement benefits for part-time employees.
- Opportunities to further develop skills through conferences and training.
- Discounted medication programs.
- Elder care insurance.

4. **What are the mentoring possibilities in this case study that would improve the quality of service from new employees and retain older workers? Why should mentoring be considered as an option?**

There are several opportunities to capitalize on mentoring programs at GASC, including creating a training program for new hires led by older staff with more seniority in customer service, the retail stores and the warehouse. Older staff with more seniority could either volunteer or be recruited to mentor newly hired staff. All mentors should be required to successfully complete a training program before mentoring. These programs should offer new challenges, responsibilities and, in some cases, a renewed inspiration for older staff, thus possibly increasing retention. Mentoring can also foster effective, ongoing knowledge-sharing at different points of employment for employees.

5. **How does the Equal Pay Act of 1963, the Age Discrimination in Employment Act of 1967 (ADEA) and the Lilly Ledbetter Fair Pay Act of 2009 fit into the compensation issues in this case study?**

The case study mentions briefly that Mattie may have hired new employees at the same or higher rates than several of her customer service employees with more seniority. The Equal Pay Act of 1963, part of the Fair Labor Standards Act of 1938, protects all workers who essentially perform equal jobs from sex-based discrimination.¹ The Age Discrimination in Employment Act of 1967 (ADEA) is intended to protect older workers (age 40 and older) from discrimination.² The ADEA protects older workers from discrimination in regard to hiring, firing, compensation, job assignments, promotions, layoffs, training, fringe benefits and any other term or condition of employment. The Lilly Ledbetter Fair Pay Act of 2009 strengthened the Equal Pay Act of 1963. The Act restores the pre-*Ledbetter* position of the EEOC [*Ledbetter vs. Goodyear Tire & Rubber Co., Inc.*, 550 U.S. 618 (2007)] that each paycheck that delivers discriminatory compensation is a wrong actionable under the federal EEO statutes, regardless of when the discrimination began. As noted in the Act, it recognizes the ‘reality of wage discrimination’ and restores ‘bedrock principles of American law.’³ Although the Act’s focus is primarily on pay discrimination against women in the workforce, it protects both men and women from unequal pay. The Act does provide an exemption for employers to be able to pay employees at different rates for the same work if the differing rates are based on a seniority or merit pay system. However, we do not know all the facts in this case study, and a thorough analysis is warranted to ensure that no discrimination is present between the new hires and older staff with more seniority. Examples of this compensation review could include a review of employees’ wages to ensure their jobs, years of service and experience align

¹ Equal Employment Opportunity Commission. (n.d.). Laws Enforced by EEOC. Retrieved from <http://www.eeoc.gov/laws/statutes>.

² Ibid.

³ Equal Employment Opportunity Commission. (n.d.). Notice Concerning the Lilly Ledbetter Fair Pay Act of 2009. Retrieved from http://www.eeoc.gov/laws/statutes/epa_ledbetter.cfm.

with peers; salary surveys to set benchmarks for positions; and creating a wage scale for all jobs. Employers usually consult with an employment law attorney or a compensation specialist on staff to manage these compensation issues. As a small organization that may not have those resources, GASC may consider contacting SHRM or the local human resource organization and networking with small businesses to manage its compensation.

6. What new career options (advancement, role changes) could be created to retain and preserve the knowledge of the more experienced workers who are considering leaving?

Several opportunities may be available for the older staff at GASC. The partners could consider creating several supervisory or management positions in the warehouse, customer service and retail operations. By creating a supervisory position for Mac, Sam could improve accuracy of the inventory and consistency of the procedures in the warehouse and possibly re-engage Mac and retain him longer in the company. Mattie needs to create a more effective and consistent training program for new hires and existing employees. GASC is at risk of losing Shelia and Pam, both senior-level employees. Shelia is showing signs of burnout and is considering leaving. Mattie could create a manager of training position and offer it to Shelia. This role would retain Shelia's retail knowledge and allow a planned transition for a new retail store supervisor. The complexity of the customer service department has increased with the expansion of GASC's business, and similar to the other partners, Mattie's responsibilities associated with growth make it challenging to stay current on the customer service department's culture and training. Adding a manager position and offering it to Pam would improve Mattie's understanding of the culture concerns and allow better supervision of the staff. Pam could also work with Shelia to create a new or revised training program and to bring back department gatherings and opportunities for team building and learning. Mattie also recognized that she needs to collaborate more closely with Brian on their hiring and training processes and to discuss whether their current approach to hiring and training is optimal for the organization.

7. How can the partners improve the gardening knowledge of new employees? Where should they look?

GASC needs experienced people to assist in teaching the basics of gardening and could explore the following options for resources:

- Have Shelia, a master gardener, and other similarly trained staff members recommend other master gardeners and attend local training programs and approach future graduates to work for GASC.

- Send employees to gardening conferences and training programs. This may be a highly valued opportunity for older staff with more seniority.
- Formally request assistance from all staff to identify and reach out to appropriate individuals in senior centers.

8. How could the company retain the knowledge of experienced employees?

GASC could create a program that targets retired GASC employees. This program would allow retirees to perform project work for the company. GASC should also start a formal knowledge transfer program.

9. What tax credits or training programs are available to the company?

There may be a variety of job training resources or tax credits available for hiring and training older workers. Several of the federal programs that are worth exploring fall under the Older Americans Act, the Workforce Investment Act and local Workforce Investment Boards.

10. What types of low-cost policies and activities could be added to engage older workers and to demonstrate that the company values them and encourages them to stay employed?

GASC could create or add the following to improve and maintain the desired culture for not only older workers but for all employees:

- Hold quarterly town hall meetings that profile older workers with testimonials as part of the meetings.
- Add an online suggestion box for company activities, and appoint a senior-level team to evaluate the suggestions and make recommendations.
- Suggest each department have “Friday Morning” stand-up meetings (led by older, experienced, senior-level staff) for 15 minutes to share weekly positive examples of employees demonstrating the company’s commitment to 100 percent customer satisfaction guarantee.
- Host social gatherings onsite and offsite with vendor speakers, provide in-house training on gardening tools, invite customers for “thank-you” conversations, and reinforce the mission.
- Provide executive coaching to Brian and his partners about best practices on maintaining a culture and on managing a multigenerational workforce. This option may not be low cost, but it is worth considering to “save” costs on turnover and management time spent on internal culture issues.

INSTRUCTOR BACKGROUND READING

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Society for Human Resource Management. (2009). *The multigenerational workforce: Opportunity for competitive success*. Alexandria, VA: Author.

Employment from the older worker's perspective:

Perron, R. (2013). *Staying ahead of the curve 2013: AARP multicultural work and career study*. Washington, DC: AARP Research.

See also:

The Sloan Center on Aging and Work at Boston College. Facts and literature. Retrieved from <http://www.bc.edu/research/agingandwork/facts.html>.

INSTRUCTOR NOTE

A good way to end a class discussion about this case is to use the following video about a “real company” that actively seeks older workers. Although the benefits of this strategy are highlighted in the video, ask the students to reflect on the benefits of a multigenerational workforce.

PBS NewsHour. (2013, January 2). Investment in older workers turns a big profit [online video]. Available from <https://www.youtube.com/watch?v=NujnD1tykkY>.

“The average age of Vita Needle’s workers is 74 years old, and that’s no accident. The manufacturing company has intentionally hired seniors—a decision that has increased profits and benefited older workers who often have a harder time finding a job. Paul Solman reports on their unique model for doing business.”

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