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Training Older Workers: Implications for HRD/HPT Professionals

Jeff M. Allen
University of North Texas

Marcy Hart
Raytheon Systems Company

ABSTRACT

In corporations across America, a race is on to find new ways to maximize human capital. An emphasis on lifelong learning will be vital for the success of our future workforce. As demographic shifts occur, the "older worker" will emerge as a primary target for this human development effort. This article explores the implications of this demographic shift for the human resource development and human performance technology (HRD/HPT) professional and recommends strategies for meeting this business need.

First, we discuss the realities of this demographic shift and compare our current workforce demographics to those of the future. Next, we examine the common myths about the "older worker," as well as what current research reports about this special population.

Finally, we examine the impact of this trend on our profession. We discuss strategies for modifying the workplace environment, reassessing workforce motivational strategies, and altering training practices in order to serve this older worker population. In conclusion, we look at the implications for the future in HRD/HPT research.

A new challenge has emerged for the training and development profession. Many human resource development and human performance technology (HRD/HPT) professionals have assumed that the workforce of the future will be similar to the current workforce, which is predominantly made up of 35-50 year olds. Yet demographic statistics do not indicate this to be true. Significant changes in our population demographics will require HRD/HPT professionals to modify workplace environments, reassess workforce motivation strategies, and alter training practices to suit the needs of older workers. If we as a profession to not begin to make this shift now, the HRD/HPT professionals of the future will struggle to change their practices in *reaction* to these demographic changes.

By the turn of the century, the median age of U.S. workers will be 45; by 2005, more than 15% of the workforce will be over 55 years old. These figures are staggering when one considers the fact that the proportion of those under 18–new workforce entrants–is expected to stay constant at around 24% between the years 2000 and 2025 (Couper & Pratt, 1997). "Projections from the

Bureau of Labor Statistics identify the three groups that will contribute the majority of the new entrants into the workforce by the year 2000: 1) women, 2) minorities, and 3) older adults" (Doucette & Venture-Merkel, 1991, p. 19). This article describes the demographic changes, workplace motivation issues, and training issues of an aging American workforce.

Demographics of an Aging Workforce

The average age of the workforce is expected to increase steadily and substantially well into the 21st century. In demographics provided by the American Association for Retired Persons (AARP), the average age of the U.S. workforce is predicted to jump from the current age of 32 to about 40 by the turn of the century (Lefkovich, 1992). In addition, nearly half the population will be over 45 years of age, and more than 36 million will be over 65 in 2000. By 2025, those who are 50 and older will make up nearly 30% of the population of the entire U.S. workforce (Caswell, 1994). These figures make today's 35-to-44 year old workers the fastest growing segment of the American population in the upcoming decades (American Association of Retired Persons, 1988).

There are three factors affecting how America's workforce will age. First, life expectancy rose from 43 years in 1900 to 72 years in 1990 (Pryor, Cohen, Berry, Azvedo, & Deets, 1991). As life expectancy increases, so does the amount of time in which workers are healthy and available for work. Second, the baby boomers, those 76 million Americans born between 1946 and 1964, are slowly progressing through the life cycle and are clogging the workplace. By 2010, these baby boomers will be

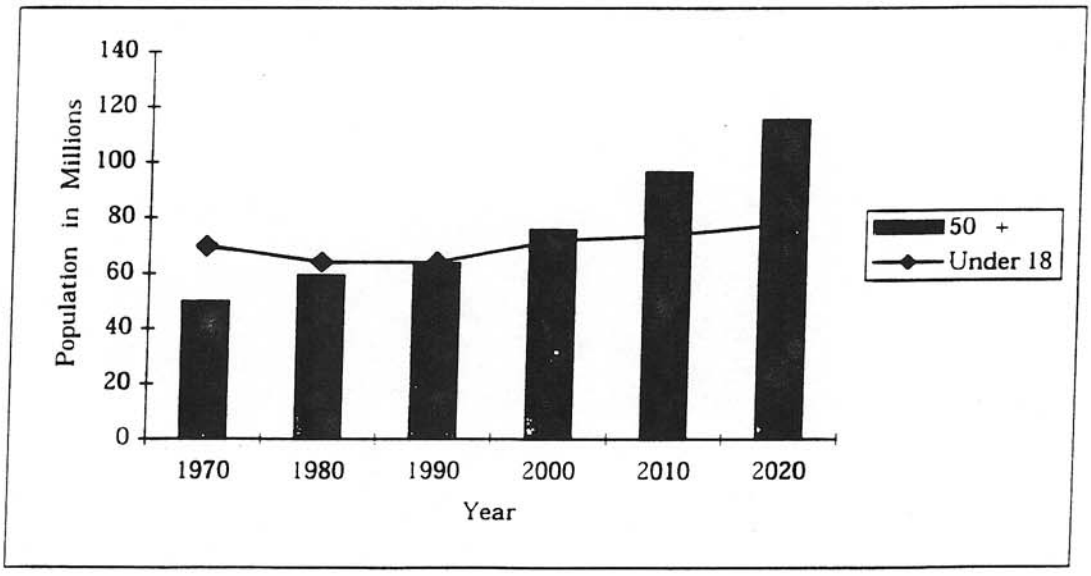

Figure 1. Americans Under 18 and Age 50-Plus, in Millions, 1970-2020.

approaching 65. Third, the declining U.S. birthrate adds to a continuing shift from what was once a "youth-oriented" nation to a more "maturity-oriented" one (Lefkovich, 1992). In fact, the most notable change in demographics has been the decline in the proportion of workers under the age of 25 (Bumas, 1996).

The industrial workplace and the field of gerontology use very different terms to describe "older workers." Gerontology uses these terms for people: young adult (20-30), adult (30-40), middle-aged (40-65), young-old (65-74), old-old (75-84), and oldest-old (85+) (Atchley, 1997; Hooyman & Kiyak, 1996). Typically, however, industry describes an older worker as anyone over 50 years of age (Paul & Townsend, 1993). During the next 30 years, industry's current definitions of "older worker" will certainly change. As mandatory retirement age increases–or disappears–and fewer 18-to-25-year-old workers are entering the workforce, industry must change the age classifications of its workforce.

Today's and Tomorrow's Workplace

The older worker will play a dominant role in tomorrow's workforce. As the supply of younger workers becomes depleted, this older, larger workforce will become the majority. How will this change the way in which the workplace operates? Currently, retirement is an option that workers exercise once or, occasionally, twice in their lifetimes. In addition, several other factors are driving this trend: financial need, desire to work, need for workers, and health benefits. In the workplace of the future, it is projected that older workers will continue to explore new careers after retirement, holding an average of two to four jobs during their retirement years (Doucette & Ventura-Merkel, 1991). While we are not yet sure if 65 years of age will be looked upon as "retirement age" in 2025, we do know that workers will continue to work after "official" retirement commences.

What types of skills will this worker of the future need? In *Beyond Workforce 2000* (Boyett & Boyett, 1995), successful employees of the future are described as those who can "develop a clear sense of their own unique skills and capabilities, continually enhance these, and find ways to match their skills and capabilities to those of the businesses that employ them." Workers in this new environment will not be assigned to permanent, lifelong jobs. Instead, they will float from position to position, wherever their unique skills and capabilities are required (Boyett & Boyett, 1995).

Supplying workers who are capable of meeting needs in this new structure will require continual upgrading of worker skills. Companies that succeed in the future will need to function as learning organizations, where learning is viewed as a key business process and a priority (Braham, 1995). Lifelong learning will be centered around key areas:

- Basic skills: Reading, writing, arithmetic/mathematics, listening, speaking.
- Thinking skills: Creative thinking, decision making, problem solving, seeing things in the mind's eye, knowing how to learn, reasoning.

- Personal qualities: Responsibility, self-esteem, sociability, self-management, integrity/honesty.

There are also five competencies needed:

- Resources: Allocating time, money, material, and facility resources; allocating human resources.
- Information: Acquiring and evaluating information, organizing and maintaining information, interpreting and communicating information, using computers to process information.
- Interpersonal: Participating as a member of a team, teaching others, serving clients/customers, exercising leadership, negotiating, working with cultural diversity.
- Systems: Understanding systems, monitoring and correcting performance, improving and designing systems.
- Technology: Selecting technology, applying technology to tasks, maintaining and troubleshooting technology (Boyett & Boyett, 1995).

Lifelong learning will be vital for success in the workforce of the future and thus for the older worker. Lifelong learning is a term that has been used for many years in the workplace, yet in the next 20 to 30 years, the need for lifelong learning will become more prevalent and critical (Bond & Coleman, 1990). In a lecture at the University of Birmingham, Tony Blair, leader of the British Labour Party, stated that the workforce of the future will constantly change, and, therefore, learning must also become more flexible. Blair further states that the Labour Party is committed to "establishing individual learning accounts, open to every citizen, to fund training. This will allow adults to pursue their own education and update their skills and knowledge" (Blair, 1997).

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One specific area in which lifelong learning needs are strongly manifested is in the area of technology. Technology is no longer a novelty in today's workforce. Technology is here to stay and has become a driving force in the industrial world. "Today's average consumers wear more computing power on their wrist than existed in the entire world before 1961" (Morrison & Schmid, as cited in Pritchett, 1997, p. 37). Today's 55-year-"old worker" was only 18 years old and entering the workforce in 1961. One assumption about older workers is that they are afraid of technology or cannot learn quickly in this area. Yet the dominant role of

technology requires all workers to be lifelong learners in order to keep up with technological innovations. In examples described later in this paper, we see that Days Inn, Combustion Engineering, McDonalds, Texas Refinery Corporation, the U.S. Navy, and others have found that the older worker is a valuable employee who can learn technology quickly and continue to make a valuable contribution in the workplace.

Older Workers: Facts and Fiction

> In the grand scheme of things, we humans are a lot like the Energizer bunny. As the only species whose life span is known to extend decades past the reproductive years, we keep going and going as other creatures fall by the wayside (Merz, 1992, p. 10).

To understand some of the challenges in the next 25 years, we need to have a balanced understanding of the physical, social, and psychological factors contributing to aging. The changes in persons between the ages of 20 and 30 or 35 and 50 are not dramatic, but the differences between a 50 and 60 year old can become noticeable, and the differences between 60 and 70 years of age are significant. In the next 25 years, trainers will begin working with a "different worker," who will have different aims and needs.

The term "older worker" evokes a mental image. This mental image may be positive or negative, but the HRD/HPT professional must have a balanced view of an individual. As individuals age, they become more heterogeneous than homogeneous. The assumptions made about *all* older workers are seldom true due to their diversity of life experiences.

Common Myths

Many myths exist about workers in this age group. Many people believe that older workers are not as motivated (Lefkovich, 1992) and do not have as much stamina as their younger counterparts (Milite & Davis, 1997). Indeed, older workers are often portrayed as slow, forgetful, and unproductive. While some of us know older workers who fit that description, we also know those who do not (Gilsdorf, 1992). Research has shown that in most jobs older workers remain productive until well after the traditional retirement age (American Association of Retired Persons, 1988). To modify older workers' schedules for no other reason than the date on their drivers' licenses is as insulting as cutting their food for them (Milite & Davis, 1997).

A lingering myth also exists that older Americans either do not need or do not want to work. Yet, according to a study by AARP, 3.5 million people aged 55 and older are below the poverty line, with an even higher rate for those 65 and older. Many older workers must work for financial reasons (Solomon, 1995), and many other older workers choose to work. In a study conducted by the Commonwealth Fund, 66% of respondents were willing to work full-time and 86% part-time. Fifty-four percent would work weekends and evenings (Paul & Townsend, 1993).

Recent reports from the Bureau of Labor Statistics cast doubt on the myth that older workers will not stay in a job as long as their younger counterparts. The Bureau found that workers 45 and older had median job tenures of 10.4 years. In contrast, people between 25 and 40 had me-

dian job tenures of 4.2 years (Paul & Townsend, 1993).

Older workers can be seen as closed-minded, thwarting progress on new ideas, (Milite & Davis, 1997) and uninterested in learning new things (Lefkovich, 1992). Many managers label older workers as "untrainable" (Gilsdorf, 1992). Indeed, the older worker who says, "We tried that before, and it didn't work," is tiresome and counterproductive. However, the older workers with a sense of company history who says, "We tried it before, and it didn't work. I think it was because we should have tried it this way instead," is adding value to the company's knowledge and processes (Milite & Davis, 1997).

Older workers are especially thought to be unable or uninterested in keeping up with new technology. Yet in a case study for training reservations agents at Days Inn, this myth was disproven. Reservations agents operate a state-of-the-art menu-driven reservation system. To be successful in this job, workers must be knowledgeable about the software; they must be able to read a CRT (computer readout terminal) display, be able to enter data quickly into the system on a keyboard, and must be able to handle a large volume of calls (McNaught & Barth, 1992). When Days Inn began hiring older workers, they initially found that the older workers took a few extra days to adjust to the computer equipment. Thus, training sessions for older workers lasted 3 weeks and cost approximately $2,025. Younger workers, trained in 2 weeks, cost $1,350 per trainee. Over time, Days Inn began revising their strategies for training older workers. The primary obstacle was determined to be a belief by the older workers that they would not be able to operate the new system. Once they became relaxed and confident, older workers typically learned as rapidly as younger ones (McNaught & Barth, 1992). The cost and time for training older workers is now the same as that for younger workers.

Many of the stereotypes about older workers are untrue. It is important to recognize that older workers are not a homogeneous group. Quite the contrary, we tend to become increasingly different as we age. Differences in education and experience–not to mention physical and health limitations–are so great that few generalizations are accurate (Caswell, 1994).

Common Truths

The evidence that older workers contribute much to our progress overcomes the myths. Consider the following:

- Golda Meir became prime minister at age 71.
- The New York Mets hired Casey Stengel as their manager when he was 75.
- Benjamin Franklin worked on the U.S. Constitution when he was 81.
- Milton Petrie, at age 90, still presides over the Petrie Stores (Paul & Townsend, 1993).
- George Bernard Shaw won the Nobel Prize at age 69.
- Arturo Toscanini assumed the baton for the New York Symphony at age 70.
- Jessica Tandy won the Oscar for "Driving Miss Daisy" at age 80.
- Picasso's largest work was created when he was 88 years old (Paul & Townsend, 1993).

Still, older workers may face certain limitations due to the aging process. As workers age, their senses of hearing and sight may diminish. They may need more light to work effectively. Ambient noise may distract them (Gilsdorf, 1992). However, although the five senses do tend to decline with age, the rate of decline varies significantly from individual to individual (Lefkovich, 1992).

As people age, physical strength tends to decline as the level of muscle mass declines (Lefkovich, 1992). Even with these limitations, more than 75% of people 65 and older are healthy enough to carry out their normal daily activities (Lefkovich, 1992).

Older workers may face difficulties in learning new material or skills under certain conditions. For example, if the material is presented in an abstract context, if there is a need to "unlearn" other material, if tasks are not paced for them, or if the trainee lacks confidence, difficulties may occur. Additionally, existing learning or performance problems tend to intensify with age, particularly when the individual is under stress. For example, workers who experienced math anxiety in their 20s are likely to find numerical problem solving even more difficult as they age, especially when they are under pressure from a supervisor (Gilsdorf, 1992). While these factors are not unique to older workers, they must be considered when addressing older workers' needs.

The older worker has much to offer employers. By and large, older workers are more loyal. Only 3% of employees 50 or over change jobs in a given year, compared with 10% of the entire labor force and 12% of workers aged 25 to 34 (Fisher, 1996). Older workers tend to arrive at work promptly (or early), have low rates of absenteeism, and show loyalty to their employers. They tend to be more satisfied with their jobs, salaries, supervisors, and co-workers than younger ones (Gilsdorf, 1992). In a study sponsored by the U.S. Small Business Administration, 65% of employers rated workers older than 55 as "more reliable, punctual, and loyal" (Peale, 1992). Older workers have been found to be more careful than their younger counterparts (Mitchell, 1990). While older workers make up 14% of the workforce, they suffer only 10% of workforce injuries (Fisher, 1996). In overall tabulations, people over 50 tend to use fewer health benefits than workers with school-aged children (Fisher, 1996).

Older workers have lower levels of formal education and are less likely to receive training from their employers, yet they are trainable and retrainable. They continue to develop their vocabularies, powers of judgment, and bodies of knowledge throughout their lives. Most suffer no marked creative or intellectual decline (Gilsdorf, 1992).

Older workers have experience (Fisher, 1996); the 40 million Americans aged 60 years of age or older have more than 1 billion years of cumulative work experience (Paul & Townsend, 1993). Older workers understand business (Fisher, 1996). They have better networks; therefore, their turn-around time is often shorter because they know the informal networks to get things done (Milite & Davis, 1997). They bring a sense of calm to the workplace because they do not become frantic as easily as younger workers. Experience has taught them to pace them-

selves to the point at which they know exactly what it takes to accomplish the task on the set schedule. As a result, they do not make many mistakes (Nelton, 1993). They often have more patience with the customer than younger people do, and they are likely to be thought of as trustworthy, experienced, and knowledgeable ("How Older Workers Can Be an Asset," 1993).

In short, many older workers have experience and a strong work ethic.

Employers acknowledge and appreciate what they bring to the workplace. In a survey of over 400 companies, more than half of the respondents praised older workers as more reliable and having better work attitudes than younger ones. Older workers also scored high marks for job skills (Gilsdorf, 1993).

Many companies are supporting these statistics with action. Combustion Engineering, for example, is bringing back many workers who went into early retirement. At the Days Inn in Knoxville, TN and Atlanta, GA, more than 30% of reservationists are older workers. McDonalds began the McMasters program to recruit and employ older workers. Texas Refinery Corporation has recruited nationally for older sales personnel for the past 20 years; 60% of its salesforce is age 55 or older, 50 are in their 80s, and several are past 90 (Paul & Townsend, 1993).

During the Gulf War, much of the U.S. success can be attributed to older workers. Ninety-five percent of the material transported to the Gulf went by older carriers. Some of the ships' engines had not been started for 20 years. The active Navy personnel were not knowledgeable about these older carriers. Instead, the Navy called in the Merchant Marine Veterans of World War II, men in their 60s and 70s. The oldest watch officer was reported to be in his 80s (Paul & Townsend, 1993).

Changing HRD/HPT Practices

Modifying the Environment

Delivering training in an environment that fits the physical and psychological needs of older workers is a strategy for meeting the needs of this special population. The following are effective techniques:

- Provide audio and visual learning methods designed to compensate for any hearing or sight loss older trainees might have.
- Be sure that there is no distracting background noise.
- Use good diction.
- Speak clearly at a lower range and a natural rate of speech.
- Use large, bold, dark print on flipcharts.
- Reduce glare.
- Keep a consistently high level of light on the screen when showing films, videos, or slides (American Association of Retired Persons, 1988).
- Allow for the fact that different trainees need different amounts of time in which to complete the stages of training. Let the group help determine time requirements for assignments (Pennington & Downs, 1993).

Reassessing Workforce Motivation Strategies

Differing subsets of older workers may be motivated in very different ways. Certain strategies, however,

seem to be appropriate for all older workers. For example, Zetlin (1997) advises employers to make older workers feel wanted. When older workers were asked what would make them decide to stay on past retirement, the most common answer was, "If the boss came and told me I was valued." To ensure success in training functions, managers can make sure than older workers understand that training is an essential and ongoing function, not a sign that people do not know what they are doing (Zetlin, 1997). Human resources personnel can tap into older workers' knowledge to support the company's people development activities. One option for accomplishing this would be to create a formal or informal mentoring program, allowing the older worker to help a younger one by giving advice or sharing experience. Another approach is to solicit ideas from the older worker (Zetlin, 1997). Many people who are nearing retirement age are eager to pass on the knowledge they have acquired before they leave the workforce (Zetlin, 1997). On the other hand, managers are often reluctant to tell older workers when their work needs improvement. Many people are uncomfortable criticizing their elders. But older workers need feedback and coaching on their performance just as younger ones do (Zetlin, 1997).

It is best not to overmanage older employees. They need less handholding, watching, and guiding. Usually, if they are simply told what needs to be done and when it is needed, they will do it (Nelton, 1993). Companies that set up an infrastructure that supports training for older workers experience greater success than those that do not provide such support. Lefkovich (1992) has suggested the following to accomplish this objective:

- Appoint several employees as advocates for older workers' training needs.
- Designate one or more employees to participate in conferences and seminars on industrial gerontology and have them report current findings.
- Partner with AARP (American Association of Retired Persons) or other organizations concerned with older worker issues.
- Provide career counseling for the older worker.
- Offer educational seminars for managers and supervisors to overcome stereotypes about older employees.

Implications for HRD/HPT Research

By 2025, "older workers"–those 50 and over–will make up nearly 30% of our population (Caswell, 1994). While 2025 is nearly 27 years away, we are already beginning to experience the emergence of this trend in workplace demographics.

Human performance professionals today utilize the adult learning field as the primary resource for determining how adults learn. In the next decades, the HRD/HPT professional will be just as likely to turn to the field of gerontology to solve many organizational performance problems. Although a vast array of research exists about older adults, research on workplace learning or training of older adults is lacking. Our learning theories must be expanded to allow researchers and re-

search/practitioners to apply theories from other fields to our profession. Research areas might include:

- Modification of workplace environments to make them better suited to older workers' needs; how is productivity affected?
- Alteration of motivational strategies used with older workers; how does this affect the productivity and recruitment and retention of older workers?
- Alterations of training strategies to accommodate older worker needs; what effects are observed in training program evaluation?
- Impact of strategies and techniques on impact older workers' attitudes and uses of technology.
- Utilization of strategies from research on special populations applied to addressing older workers' needs.
- Achieving business benefits through establishing formal methods for interaction between older and younger workers.
- Utilization of older workers' knowledge to impact formal business initiatives, quality, and productivity.

The changes described in this article will occur. As our field changes, so must research and practices. Will we develop theory to lead our practices proactively? Or will we be forced to respond to these work issues and practices reactively?

Resource List

The following resource list is not comprehensive, but it is meant to provide HRD/HPT researchers a place to begin their research of training older workers.

Books/Booklets

American Association of Retired Persons Workforce Programs Department. (1993). *How to train older workers.* Washington, DC: American Association of Retired Persons.

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Agencies

Administration on Aging National Aging Information Center, 330 Independence Ave., SW, Washington, DC 20201. (202) 619-0724. *Fax:* (202) 260-1012. *Web location:* http://www.aoa.dhhs.gov/factsheets/default.htm

American Association of Retired Persons, 3200 E. Carson St., Lakewood, CA, 90721. (800)-424-3410. *Fax:* (not available). *Web location:* http://www.aarp.org/

Bureau of Labor Statistics, Division of Information Services, 2 Massachusetts Ave. NE, Room 2860, Washington, DC 20212. (202) 606-5886. *Fax:* (202) 606-7890. *Web location:* http://stats.bls.gov/blshome.html

National Institute on Aging, P.O. Box 8057, Gaithersburg, MD 20898-8057. (800)222-2225. *Fax:* (301)589-3014. *Web location:* http://www.nih.gov/nia/index.htm

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JEFF M. ALLEN is an assistant professor at the University of North Texas, Department of Technology and Cognition. His research interests include team assessment, global workforce issues, strategic planning, and learning technologies. *Mailing address*: P.O. Box 311337, Denton, Texas 76203-1337

MARCY HART is a training and development specialist at Raytheon Systems Company where she coordinates, develops, delivers, and evaluates training. Her areas of specialization include leadership, team development, and quality. *Mailing address:* 13532 N. Central Expressway, M/S 45, Dallas, Texas 75243