Worksheet: Look at your current employee data through an age lens

How to use this worksheet:

Before choosing the actions to take this year, take a moment to understand how age might already influence your current employees' experiences. Use this worksheet to help guide discussion about how a multi-generational workforce affects your employees' experiences

Who to include in the conversations:

You can use it as an exercise with your HR leadership team and then integrate the outcome into a broader presentation(s) with organizational leaders and/or Human Resources sub-teams who are taking action to address the key take-aways from this worksheet:

Before jumping in to create an action plan to leverage a multi-generational workforce, it's important to be curious about the experiences of current employees. What does available data from your own organization tell you? What questions does it raise? Which areas emerge as opportunities for taking action?

Step 1: Gather or access employee engagement or satisfaction data.

1. Ask the team who manages employee surveys what data they have collected that can be used to generate a report that filters by employee age. Look at a sample of the age-filtered report they can run, and work with that team to create a report structure that offers the most insight. If you can define age "cohorts" by using employee birth year, consider the following, which map to generational boundaries:

   ❏ 1995-2012 (Gen Z)
   ❏ 1980-1994 (Millennial)
   ❏ 1965-1979 (Gen X)
   ❏ 1946-1964 (Baby Boomer)
   ❏ Before 1945 (Traditionalists)

   You may also want to run a version of the report that compares the data split by: All employees, Employees under age 40, and Employees age 40+. This data view may help you see opportunities and issues among the 40+ group, who are members of a legally protected class under the federal Age Discrimination in Employment Act (ADEA).

   If you are not able to access existing employee survey data that can be filtered by age/ birthdate, you can use the AARP template survey available **here**.

Step 2: Analyze and discuss your data.

1. Within each survey question result, are the employees' experiences roughly similar? Are they different? Circle areas where employee results for a key age group skew higher or lower or note differences from group to group. Talk about what may influence this result.

2. Distill your learnings into a short list of questions you'd like to ask to employees in each age group/ generation. These may reflect results that are very surprising to you (either in a positive or a negative sense). You might ask people to share their personal experience so you can understand the quantitative data in a qualitative context, or you might ask for ideas the organization can consider that can improve the employee experience.

3. Make a plan for how to gather that additional information from employees so that you can best interpret your data. A few interviews? A short, targeted employee pulse survey to a specific employee demographic? Engaging a specific ERG to talk with their members?

4. Now you are ready to use the data effectively to design an age inclusion action plan that is grounded in a deeper understanding of your employees' current experiences working in a multi-generational workforce. Action plans that meet employees where they are are usually more successful!