

## Worksheet: Understand where age inclusion is already integrated and where opportunities remain

### How to use this worksheet:

Use this worksheet to create a high-level view of where age inclusion is already integrated into your organization, and where opportunities remain. This will be helpful input when you design your action plan.

### Who to include in the conversations:

You can use it as an exercise with your Senior Leadership Team, or you can use it with your HR leadership team and then integrate the outcome into a broader presentation to senior leaders.

Take this brief assessment to gain a bird's eye view of where your organization may have pockets both of progress and of opportunity to build a more age-inclusive workplace.

Note: If you have completed the optional first action item in "Chart Our Path" section—looking at your current employee data through an age lens— the completed worksheet can be a great resource to use in conjunction with this one.

<b>Best practices for an organization working to optimize a multi-generational workforce</b>	<b>Step 1:</b> Has your organization taken this action?	<b>Step 2:</b> Jot a note about any current organizational priorities or initiatives that could align and support this action (or "none")	<b>Step 3:</b> Place an "X" in the box if you answered "No" or "Somewhat" in Step 1 AND identified an opportunity in Step 2
<b>Strengthen HR: Talent Acquisition</b>			
We have reviewed our Talent Acquisition practices to see where we can better support a multi-generational workforce.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have provided training for our Talent Acquisition on best practices to support a multi-generational workforce.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have applied an age lens to analyze our current Talent Acquisition data.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		

<b>Strengthen HR: DEI</b>			
We have included age-inclusion in our Diversity, Equity and Inclusion formal policies.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have integrated age inclusion into an existing DEI program.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have applied an age lens to analyze our current DEI data.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
<b>Strengthen HR: Benefits and HR Policies</b>			
We have reviewed our Benefits and HR policies practices to see where we can better support a multi-generational workforce.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have integrated age-inclusion into an existing benefits practice	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have applied an age lens to analyze our current benefits utilization and satisfaction data.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
<b>Strengthen HR: Learning &amp; Development</b>			
We have reviewed our L&D content and practices to see where we can better support a multi-generational workforce.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have integrated age inclusion into an existing L&D practice.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have applied an age lens to analyze our current L&D data.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
<b>Strengthen HR: Workforce Management</b>			
We have reviewed our workforce management practices to see where we can better support a multi-generational workforce.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have integrated age inclusion into an existing workforce management practice.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have applied an age lens to analyze our current workforce management data.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		

Support Managers & Teams			
We have provided training to managers on how to lead a mixed-age team.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have asked people managers to adopt age-inclusive best practices within their teams.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We have encouraged managers to reflect on how effectively they have adopted age-inclusive managerial and team practices.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
Empower Employees			
We provide resources and support to employees to make their own teams more age inclusive.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We provide resources to equip employees to create a career plan for longevity.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		
We provide programming or resources to prepare employees to integrate caregiving and work.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat		

If you've completed Steps 1, 2 and 3, you now have a focused list of actions you can consider including in your action plan for the coming year. To create your plan, you can:

1. Simply choose all or some of the actions with an "X" above and use the resources in this Generations at Work Tool to execute each one.
2. Host a workshop with your HR team leaders to create your action plan. To make it easy for you, a draft presentation deck and supporting resources are all available in the [Generations at Work Tool](#).