

Worksheet: Review our workforce management practices

How to use this worksheet:

Employers are adapting to multigenerational workforces by creating workforce management programs that support career longevity and flexibility. Use this worksheet to assess your strengths and opportunities to ensure your programs meet the needs of workers of all life stages and career stages.

Who to include in the conversations:

Staff involved in programs and initiatives that support job design, training, professional development, performance assessment, promotion processes, and policies such as hybrid and flexible work, part-time and on/ off ramping.

Take a few minutes to talk with your team about the current state of your workforce management practices. This will provide insight you can use to create your action plan to further embed age inclusion into your workforce management efforts.

Step 1: Take a moment to read the AARP one-page overview of the Prism of Age concept so you have it in mind as you consider your workforce management practices.

Step 2: List all of your workforce management programs and initiatives

1. If you have an extensive catalog, you can print out a list from your own system.
2. Alternatively, you can list key programs, policies and initiatives on the template included here.

Step 3: Identify where the prism of age concept and/or multigenerational workforce issues are included in the content of the program/ policy/ initiative.

1. Put a ✓ next to each one that already addresses the needs of employees of all life stages and career stages in the content of the program/policy/ initiative. Remember that a key age-inclusive best practice in workforce management efforts is to design offerings to meet the needs of employees in all life stages and in all career phases. For example,
 - a. When providing resources for career planning, do these frame career planning tips and tools in terms of life stage and career stage instead of assuming that specific ages determine likely career plans? Do you provide specific efforts to support common key career moments, such as becoming a first-time people manager, adjusting to a promotion, navigating transfer to a new office/ moving for a new position, or facing a career pivot?
 - b. Do you offer specific workforce management efforts to help employees anticipate and manage common key life experiences, such as the birth or adoption of a child, taking on a family caregiving role, working during a grieving phase, navigating menopause in the workplace, requesting accommodation for a disability or health issue, talking to a manager about burnout, etc.)
 - c. Do you offer a resource (internal HR staff or external coach) with whom an employee can confidentially talk about potential reasons to leave—whether for caregiving pressure, planned retirement,

or departure to work for a different employer? This resource can essentially gather “exit interview” type information about the employee’s reasons for considering leaving—but with the potential to help the organization address the employee’s concerns and retain them instead.

d. When retirement policies are defined, do they accommodate options such as part-time or phased retirement? Do they address benefits and equity considerations that make it financially reasonable to use any phased retirement offerings?

- For those that are unchecked, put a instead.

Step 3: Identify where age-inclusive best practices are used in the communication and implementation of your workforce management efforts.

1. Consider these best practices for communicating and implementing workforce management efforts:

- a. Communicate using language that references life stage and career stage, rather than age.
- b. Communicate about programs in a variety of ways, so that employees can find out about offerings in the way they are most likely to consume new information.
- c. Design and deliver initiatives to encourage mixed-age conversations, cross-age mentorship, and multigenerational work teams.
- d. Ensure extra implementation resources at points where employees may be at higher attrition risk, such as early career, late career, addition of a child to the family, or 3-6 months into caring for an adult family member
- e. Frame the topic of career planning for longevity and upskilling as highly relevant for all career stages.
- f. Frame the topics such as upskilling and knowledge transfer within a growth mindset – all ages can teach and all ages can learn.

2. On your list of workforce management offerings, for each one put a next to each best practice that it uses. Put a next to each best practice that the offering does not yet use.

Step 4: Consider all trainings that have circles/ zeros. These are areas of opportunity for your team to make your content, design and delivery more valuable to a multigenerational workforce. Discuss and decide which areas your team wants to address this year, considering:

1. Where could improvements reach the highest number of employees?
2. Where could improvements address the experience of employees in their core daily work teams?
3. Which areas could reduce legal risk for the organization in ways that are valued by the organization?
4. Where could improvements impact the most pressing challenges faced by the organization?

3.5.1 Worksheet_Review Workforce Management Practices

Step 1: List workforce management efforts that are for...	Step 2: <input checked="" type="checkbox"/> or <input type="checkbox"/>	Step 3: or					
Career planning for longevity							
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Upskilling for all employees							
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Knowledge management and knowledge transfer							
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Retirement planning for employees all career stages							
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Other topics							
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