

Worksheet: Map outcomes of recent age inclusion efforts

How to use this worksheet:

Use this worksheet to help identify teams who have participated in recent age inclusion efforts and choose how to celebrate their efforts. Pay special attention to senior leaders who supported their teams' efforts, and individual advocates who went above and beyond to make the initiative successful. Recognition is a powerful motivator for people across the organization to see that this is valued work that enhances career opportunities.

For those leaders and teams who participated, what metrics of success are available? How did their overall metrics perform during this period, and can any of that be attributed to increased age inclusion efforts?

Who to include in the conversations:

Human Resources leaders, key senior leaders who have been engaged in the recent age inclusion efforts, staff who led execution of key recent age inclusion efforts.

After a period of activity, it's important to slow down to reflect for a moment. With others who were involved in the range of actions your organization took to boost age inclusion and better leverage the power of your multigenerational workforce, discuss the following questions. Distill your learnings to a few key points you can share with senior leaders who will influence possible next steps.

Step 1: Discuss key reflection questions:

1. What action(s) did we take to boost age inclusion and better leverage the power of our multigenerational workforce?
2. For each action/ initiative, discuss and fill out these questions:
 - a. What was the action/ initiative? _____
 - b. What resources were used to implement it?
 - i. Planning _____
 - ii. Employee participation _____
 - iii. Budget _____
 - c. What were the high-level results?
 - i. Quantitative: _____

ii. Qualitative: _____

d. How did these results roll up to help the organization achieve its goals?

i. Employee engagement goals: _____

ii. Talent acquisition goals: _____

iii. DEI goals: _____

iv. Benefits goals: _____

v. Team productivity goals: _____

vi. Team performance goals: _____

vii. Financial goals (revenue or profit): _____

viii. Financial goals (cost savings, avoidance of costs of attrition, etc.): _____

ix. Other goals (please describe) _____

e. What did we learn about how to implement an initiative like this? _____

f. Who led it? _____ Contributed to it? _____

_____ How have we publicly recognized their contributions? _____

How has their direct supervisor recognized their contributions? _____

_____ How can we create additional opportunities for them to continue this work? _____

g. Are there clear and necessary next steps to scale the success of this action/ initiative, or to build on it with a follow-up action? If so, please describe.

3. If our organization completed the "Find Your Why" and/or "Chart Your Path" actions in the Generations at Work Tool, how did the results we see support or advance the organizational priorities that were initially defined by senior leadership?

a. _____

b. _____

c. _____

Step 2: Distill 3-5 key learnings from the overall effort this year, which should inform future planning for the next set of initiatives to help our organization leverage the power of a multigenerational workforce:

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____