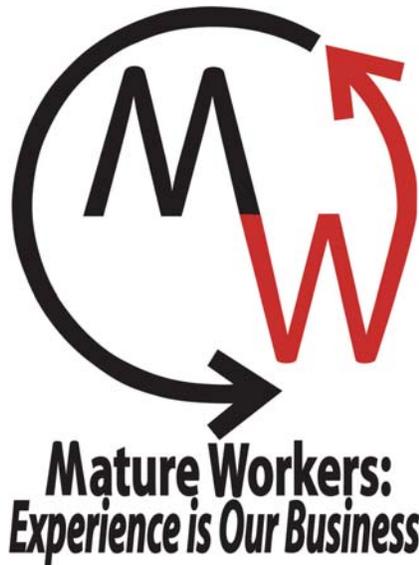


The Arizona Mature Workforce Initiative



Year One Outcomes & Recommendations

**A Report to
Governor Janet Napolitano**

May 2006



The Arizona Mature Workforce Initiative: Year One Outcomes & Recommendations



Introduction

The aging of our workforce is the result of changing demographic and social trends. Like the perfect storm, three important trends are coming together and are predicted to have a dramatic impact on the American workforce. They are:

1. The workforce, and the population as a whole, is aging;
2. The number of available jobs are increasing and labor shortages are projected in a growing number of sectors of the economy; and
3. Many workers over age 50 want, while others need to continue to work beyond the traditional retirement age.

This report highlights the outcomes and achievements from the first year of the Arizona Mature Workforce Initiative, and outlines the recommendations from three Arizona Summits on the Mature Workforce – meetings that brought together executive level business leaders and mature workers to grapple with the issues of an aging workforce. Specific implementation strategies are included for consideration.

Background

The demographic projections are clear. By 2012, nearly 20% of the total U.S. workforce will be age 55 or older, up from just under 13% in 2000¹. This growth in the number of older workers reflects the fact that the population as a whole is getting older due to several factors, including the aging of the Baby Boom generation, lower birth rates for generations immediately following the baby boom, and longer life expectancies².

As the 76-million Baby Boom Generation nears traditional retirement age, many U.S. companies and governments are facing a potentially significant loss of talent and institutional knowledge across key areas, including leadership, sales, and technical disciplines. With the pending retirement of the baby boomers – the first of whom will be eligible for early Social Security benefits in 2008 – many analysts are predicting growing labor shortages in tomorrow's workforce. Indeed, many employers in Arizona are already facing or anticipating shortages and are starting to take steps to manage their workforce needs. In addition to the well-known shortages of nurses and other health care professionals, many organizations and systems that rely

on specially trained individuals such as teachers, engineers, and the like are also feeling the pressure of labor shortages.

In 2005, AARP conducted a survey of human resource managers across the country and found that “58% said that it is more difficult today than it was [just] five years ago to find qualified job applicants. More than half of the HR managers believe that their companies are likely to face a shortage of qualified workers within the next five years.³” Many Arizona companies have expressed similar concerns, with some companies facing the reality that as much as 50% of their workforce will be eligible for retirement by 2010.

While the impact of this undeniable trend will vary from industry to industry and among different job categories, many companies will be able to avoid the drain by encouraging today’s mature workers – those age 50 and over – to stay in the workforce longer. Fortunately, research shows that many of today’s mature workers want to work and want viable work options later in life. In a 2002 study by AARP, 68% of workers between the ages of 50 and 70 who have not yet retired said that they plan to work in some capacity into their retirement years or perhaps never retire.⁴ In Arizona, the same is true. A 2002 study of older workers, conducted by the Governor’s Advisory Council on Aging, found that 78% of those surveyed were looking for employment, although only 36% were actually employed. Thus, this raises several points of concern:

- Are businesses willing and able to use mature workers?
- Can business models change to match the changing nature of the workforce?
- Do mature workers have the requisite skills for an ever-changing job market?
- What role does government have in assisting business leaders and mature workers to adjust to the changing nature of the workforce?

The Arizona Mature Workforce Initiative

To address these concerns and ensure that Arizona has both opportunities for older people to work and remain self-sufficient throughout their lives, and to support business growth and development across the state in light of an aging workforce, Governor Janet Napolitano joined forces with AARP to launch the *Arizona Mature Workforce Initiative* in February 2005. The Mature Workforce Initiative (MWI) is designed to raise visibility, awareness, appreciation of and employment opportunities for mature workers, while addressing labor force shortages in the business sector. In addition, the MWI aims to provide mature workers with new points of access to training that will allow them to remain competitive in the job market and to provide them connections to employers who value their experience. By developing a healthy exchange of ideas and dialog among the mature workforce, business and industry, government, and their local communities, we are able to ensure meaningful employment opportunities for mature workers and provide businesses with the ability to address at least some of the impact of an aging workforce.

Building on the work of the Governor’s Advisory Council on Aging’s Mature Worker Committee (formerly the Older Workers Task Force), established approximately six years ago, several key activities have been undertaken since the February 2005 launch of the Arizona Mature Workforce Initiative (MWI) including:

1. Increasing awareness about the changing nature of Arizona’s workforce, and the role of the mature worker in the labor force of the future;
2. Collection and compilation of data about the mature workforce;
3. Branding of the initiative through development of the Mature Worker logo and slogan;
4. Increasing employment opportunities of mature workers; and
5. Hosting 3 regional invitational *Arizona Summits on the Mature Workforce*. The Summits brought together more than 250 executive level business and industry leaders from all sectors of the community, and more than 50 mature workers of all professional and socio-economic backgrounds, to explore the identified obstacles and discuss possible solutions and actions needed. The outcome of the Summits is a set of recommendations for action for the Governor’s consideration.

Year One Outcomes of the Arizona Mature Workforce Initiative

It has been an exciting year with the Arizona Mature Workforce Initiative (MWI). This report documents the many outcomes and progress made towards improving employment opportunities for mature workers and assisting Arizona businesses in managing an aging workforce.

Goal 1. Increase awareness about the changing nature of Arizona’s workforce, and the role of the mature worker in the labor force of the future.

Awareness is an important aspect of the Mature Workforce Initiative (MWI), as the changing demographics are unprecedented in history. While businesses and society have long dealt with retirees and aging workers, never before has there been an entire cohort of people – indeed a full fourth of our population – moving into traditional retirement years at the same time. Nor has there ever been such a desire among older workers to continue working well beyond the typical retirement age. Thus, raising awareness about the aging of our workforce, along with the incredible opportunities and challenges it will bring, is an important aspect of the MWI.

The major vehicle to increase awareness is the Governor’s Advisory Council on Aging’s Mature Worker Committee. A targeted effort has been made this past year to increase the number and diversity of individuals serving on the Committee and to deliver its message about the changing nature of our workforce. Participation has consistently grown throughout this past year, with an average of 40 participants attending each monthly meeting, and more than 75 people on the active participant roster. Members hail from the private sector, public sector, Chambers of Commerce, social and health care sectors, public policy, aging advocates, and the general public. Each new meeting typically brings two to six new members, most recently including a gentleman from a refugee resettlement organization. The group has also expanded the nature of the Mature Workforce Initiative to include the concept of civic engagement for older adults, believing that the

two concepts are part of a larger issue about work in late life. In an effort to increase participation in the Committee even more, in April 2006, the Governor's Advisory Council on Aging changed the meeting date of the committee to bring it in line with other Council committees, thereby allowing for increased participation by Council members. The move was made with the full consent of the members of the Mature Worker Committee.

The Mature Worker Committee has also increased awareness by publishing articles in newspapers, on the radio, and through the Mature Worker Job Fairs and Summits. By educating ourselves, the general public, and business leaders, we are better able to move forward with a common understanding of the concerns that businesses and mature workers have, and better able to plan for increased activity through this initiative.

During the coming year, the Mature Worker Committee will embark upon a more formalized public awareness campaign, calling upon and utilizing the various resources of the group's partners (including AARP) to spread the word about the value and importance of mature workers, and to recognize businesses who have made considerable efforts to incorporate mature workers into their workforce.

Goal 2. Collect and compile data about the mature workforce.

Collection of data for the Arizona Mature Workforce Initiative has been important for several reasons. First, it was important to ensure that we heard the voice of Arizona businesses and workers instead of relying on national aggregate information. Second, data collection is a long-term activity and needed to get started so that the necessary data would be available when the Initiative headed into the implementation phase. And finally, data is an important factor in measuring outcomes and success.

To better reflect the voice of Arizona businesses and workers, informal surveys were administered by members of the Mature Worker Committee, at large scale events like the 2005 Senior Action Day at the Legislature, Council on Aging meetings, and other places where large numbers of seniors gathered. In addition, the AZ Office of Tourism agreed to add 4 mature workforce-related questions to a series of discussion topics at about 40 business and community forums they held throughout the spring and summer of 2005. Those questions were:

- A. What impact will aging of the workforce have on staffing in your industry?
- B. What intergenerational issues affect your workforce?
- C. What needs do you or your customers have that you are unable to meet because your employees don't have the necessary skills?
- D. What can be done to help aging members of the workforce to better meet the needs of your customers?

Each forum's responses to these questions were shared with the Mature Worker Committee. This information, combined with the data gathered from the surveys and significant national research, shaped the nature of the discussions at the three Arizona Summits on the Mature Workforce in November 2005.

In addition to the elements described above, the Mature Workforce Initiative has also generated other data development, including a complete review by the Division of Employment and Rehabilitation Services within the Arizona Department of Economic Security, of its Job Service Center placement rates of older workers. Upon review it was found that while the division had a rate in line with national standards, it was lower than the percentage of older workers in the Arizona population. Thus, at the Division Director's instruction, three things happened:

1. New and higher target Job Service placement rates for mature workers were set;
2. Data collection methodologies were changed beginning in July 2005 to better track Job Service Center data about mature workers; and
3. Regular review, tracking, and reporting about mature worker data, as it pertains to the job placement services provided through the Job Service Centers and Arizona One-Stop Workforce Centers, was established.

Finally, the Mature Worker Committee has continued to work with the Population Statistics Unit of the Department of Economic Security to develop the necessary collaboration with the federal government to eventually produce a comprehensive report on older workers in Arizona. While there is no significant cost to this collaboration, it does take time to establish and should produce quite useful data results within a couple of years. This is a long-term benefit that the entire Mature Worker Committee deems important to pursue.

Goal 3. Branding of the initiative through development of Mature Worker logo and slogan.

Every highly successful company has a slogan and/or logo that is recognizable and easily associated with that organization. The Mature Worker Committee wanted to follow that general business concept by creating a simple yet effective logo and slogan for the Arizona Mature Workforce Initiative. To that end it developed the following logo:



The concept of the logo is that Mature Workers “come back around” for a second go in the workforce. The design was a creative collaboration among several members of the Mature Workforce Committee and even the logo's colors were decided by committee consensus. Particularly when used against a gray or buff/tan background, the logo takes on a distinctly Arizona feel. Feedback about the logo from outside individuals and groups has been quite positive, and the logo works well in a variety of applications.

The Committee also developed a slogan for the MWI, as it wanted to highlight the most valuable thing that mature workers have to offer, and which can only be gained with age – experience. Thus, the MWI slogan is:

“Mature Workers: Experience is Our Business”

Early branding of the MWI has allowed us to build recognition throughout the first year of implementation, and has given the Initiative a visual identity. Further, the logo, slogan, and entire concept are now being incorporated into the state's federally required (under terms of the federal Older Americans Act) Older Worker Plan – now renamed the Mature Worker Plan. This is an exciting development as we strive for maximum coordination between various components of the state's workforce system.

Goal 4. Increase employment opportunities for mature workers.

The Mature Worker Committee decided early on that the most important measure of success was an increase in the number of mature workers who got jobs as a result (directly or indirectly) of the MWI. Thus, there were two specific strategies that were undertaken towards that goal:

1. Training of Arizona One-Stop Workforce Center employees on the unique nature and needs of mature workers; and
2. Hosting Mature Worker Job Fairs.

Training

As the Committee embarked upon the idea of training one-stop workforce center workers, it was clear that there was no good curriculum for these workers about the needs of older workers, and the Committee did not have enough knowledge about how the one-stops worked to offer such training. Meanwhile, in Tucson, the Pima Council on Aging – local planning and service agency established under the federal Older Americans Act – had been collaborating with the Pima One-Stop to develop the Mature Worker Connection. The Mature Worker Connection is a mature worker specific initiative to develop employment opportunities for older workers and then successfully place seniors into those positions. Different from the federal Senior Community Service Employment Program, which is a training program for low-income and new-to-the-workforce seniors, the Mature Worker Connection targets mature workers from first time workers to executives with a lifetime of experience.

To help launch this effort, the Governor's Council on Workforce Policy, managed by the Arizona Department of Commerce, awarded a grant to the Pima Council on Aging with the caveat that, in addition to launching the Mature Worker Connection, they would also produce data about their placement rates and would develop two manuals. The first manual would be about how to work with employers to develop their interest in and understanding about mature workers, and the other manual would discuss how to work with and place mature workers in jobs with long-term success. The manuals will provide the necessary insight into the unique needs of older workers so that One-Stops can meet the increased goals set by DES. Once the two manuals are produced – sometime in the summer of 2007 – the manuals will be reviewed for use as the basis of a training program for one-stop workers across the state.

Mature Worker Job Fairs

The first Arizona job fair for older workers was conceived a year before the launch of the Mature Workforce Initiative. The brainchild of the Mature Worker Committee (formerly the Older Workers Task Force), an Older Workers Awareness Day was held in September 2004 in North Phoenix. The event included a job fair, and was quite successful with about 600 people attending that event.

Since that time, three additional Mature Worker Job Fairs have been held - two in Tucson (Spring 2005, November 2005) and one in the Phoenix area (Glendale in November 2005). A third Mature Worker Job Fair is planned for May 24, 2006. It is the two job fairs in November 2005 that are highlighted in this report.

The two job fairs were complimentary events to the Arizona Summits on the Mature Workforce held in Glendale and Tucson in November 2005. The job fairs were held simultaneously with the Summits and in the same facility. In collaboration with the Governor’s Advisory Council on Aging, GateWay and Glendale Community Colleges coordinated the Glendale fair, and the Pima Council on Aging coordinated the Tucson fair.

More than 150 employers and 2,000 mature job seekers participated in the two events. An early February 2006 follow-up of employers who participated in the Tucson Mature Worker Job Fair showed that there were 200 hires of mature workers from the Tucson job fair. This represents about a 20% placement rate from the one fair. Clearly it was a successful event and a good strategy to increasing employment opportunities for mature workers.

Additional data was gathered from the Glendale Mature Worker Job Fair. Data was received from 662 of the nearly 1,000 job seekers at the fair. Analyzed by students from Glendale Community College, the data indicates the age distribution of job seekers, their area or field(s) of interest, and their hometown location. Figure 1 below shows the age range of job seekers at the Glendale Job Fair in November 2005. As you can see from the chart, more than half of all respondents were in their 50’s, with about a third of respondents in their 60’s. Not surprisingly, those over age 70 slightly outnumbered those under age 50, as the fair was specifically marketed to “mature workers over age 50.”

Figure 1

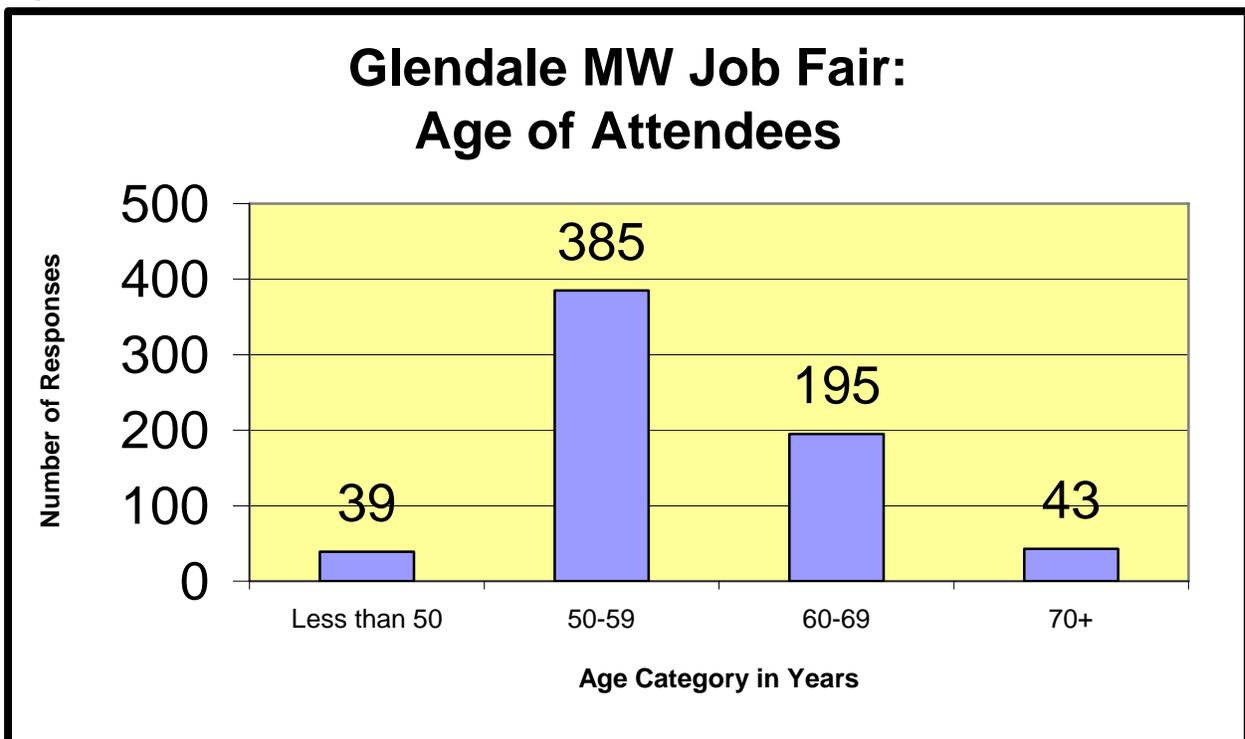
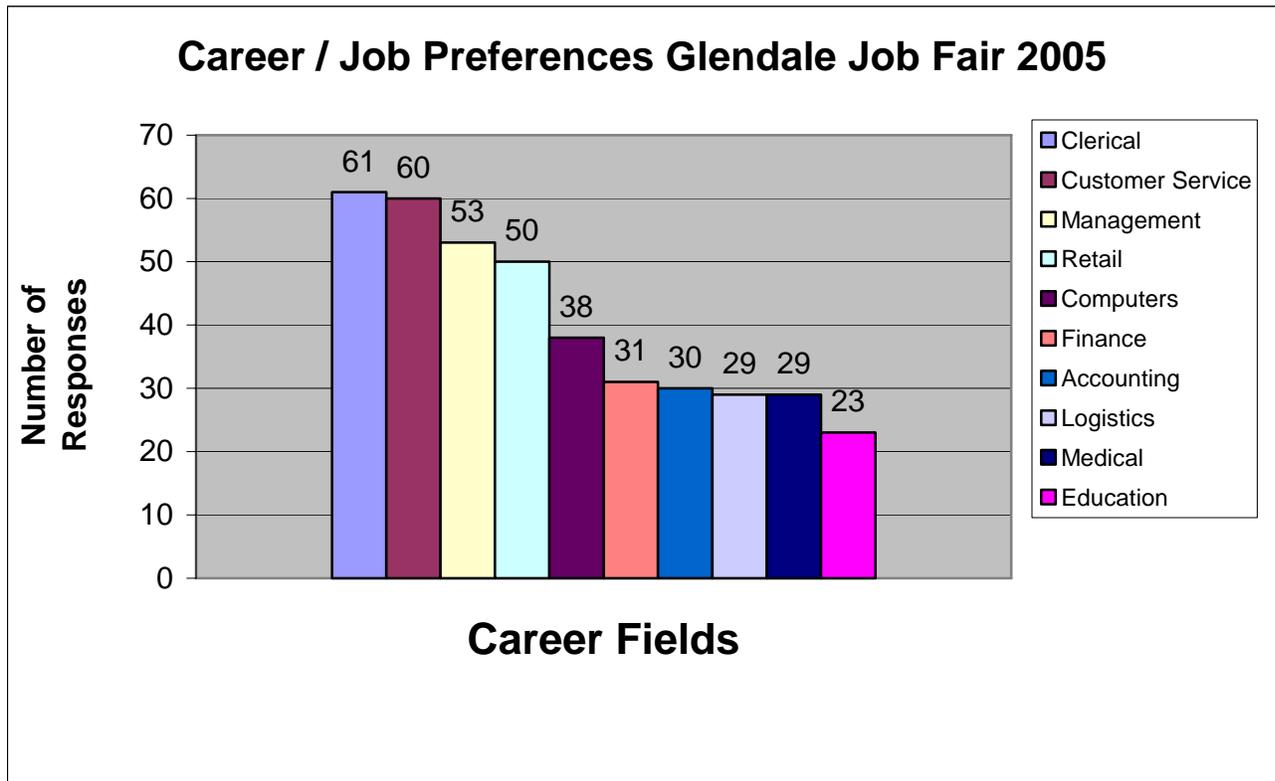


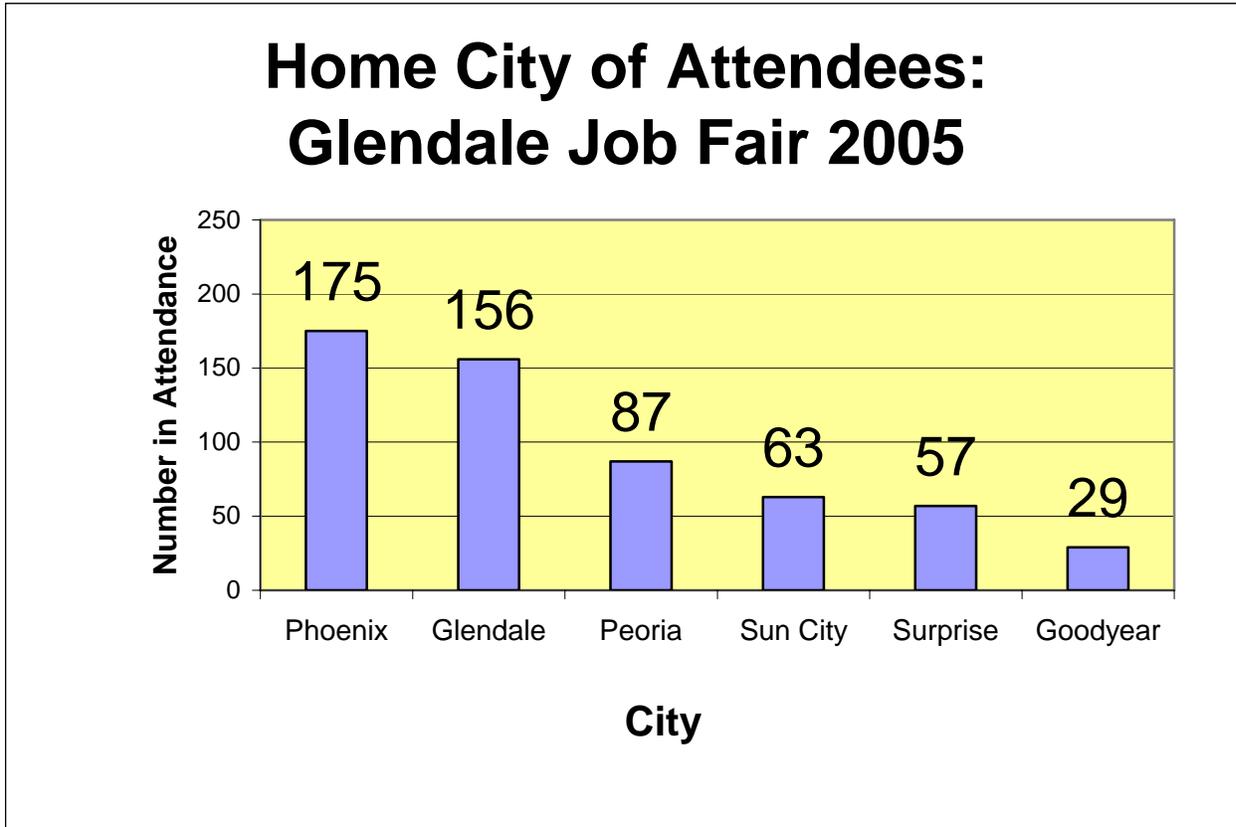
Figure 2 depicts the types of careers/areas of work that job seekers wanted. Clerical, customer service, and management were at the top of the ladder, while fewer workers were looking for educational, health care or logistical positions. This may be because, at least in education and health care, there is currently a shortage of workers so people with these skills may not need a job fair to find employment. It might also highlight that there is indeed a staffing shortage in these areas. Regardless of your interpretation of the information, this type of data is important for future job fairs so that we can share it with potential employers who can better target the types of jobs and skill sets they recruit for at mature workers job fairs.

Figure 2



The final set of data that was gathered at the Glendale job fair was the attendees' home city. While the majority was predictably from the Phoenix metropolitan area's west valley, there were many cities represented with fewer than 15 attendees, with some as far away as Show Low (about 4 hours northeast of Glendale)! Cities not represented in Figure 3 because they had fewer than 15 attendees were: Scottsdale, Avondale, Mesa, El Mirage, Tempe, Chandler, Buckeye, Litchfield, Laveen, Gilbert, Youngtown, Anthem, Apache Junction, Cave Creek, Desert Hills, Fountain Hills, Plano, Quartzsite, Queen Creek, Redlands, Show Low, Sun Lakes, Tonopah, and Whittman.

Figure 3



The third job fair of the Mature Workforce Initiative is planned as part of the Governor’s Conference on Aging in May 2006. In addition, the Governor’s Advisory Council on Aging is working with the National Governors Association to develop a mature worker job fair replication guide, so that communities across Arizona – and indeed across the country – will have the necessary tools to sponsor their own Mature Worker Job Fair.

Goal 5. Host 3 regional invitational Arizona Summits on the Mature Workforce to develop strategies and recommendations to the Governor on mature workforce issues.

Summit Format & Methodology

In November 2005, the Governor’s Office, the Governor’s Advisory Council on Aging, and AARP co-hosted three Arizona Summits on the Mature Workforce. These summits were designed to bring together executive-level business leaders and mature workers to participate in facilitated discussions about the obstacles and opportunities that an aging workforce presents. Regional summits were held in Northern Arizona (Prescott), Southern Arizona (Tucson), and Central Arizona (Glendale) on November 1, 9, and 16 respectively. Participation in the Summits was by invitation, and potential participants were identified by numerous methods including recommendations from members of the Mature Worker Committee, the Governor’s Advisory Council on Aging, Governor’s Office staff, the aging network, state agencies, and local civic and private sector

agencies. Executive level business leaders were targeted for participation, as they hold positions of authority and can significantly alter their organization's perceptions and culture if desired. A total of (approx.) 450 invitations were sent with more than 300 people attending the Summits.

The agenda for each summit [see Appendix for sample] included an opening session with remarks from the host city mayor, a successfully employed mature worker who had made a transition from one career to another, and a business executive from one of AARP's "Featured Employers" Program who discussed the bottom-line business aspect of addressing the aging of Arizona's workforce. "Featured Employers" are businesses identified by AARP as having exemplary practices in employing older workers. After the opening session, the participants moved into pre-determined discussion groups of approximately 25-30 people each. A professional facilitator then led each group through a review of the research-identified obstacles [see Appendix for list of identified obstacles] and a 90-minute discussion about possible solutions ensued. Transcribers were provided for each discussion group and once the discussion groups concluded their work, participants returned to a general session to hear a brief summary from each small group, and then enjoyed a lunch with a more in-depth presentation from the AARP Featured Employer. Each Summit ran from 9:00 a.m. to approximately 1:30 p.m.

Recommendations from Summits

After reviewing the input from all 9 discussion groups, there were five clear recommendations:

- Public Education & Awareness – Unanimous recommendation from all three summits that the State should launch a public awareness/public education campaign about the aging of our workforce, how it can be addressed, and what workers and businesses need to know and do. While there was general agreement that businesses often recognize the value of mature workers, the public is not as aware of the aging of America's workforce and its potential impact on Arizona businesses and our economy.
- Training & Technical Assistance – Business leaders in all three summits asked for support and technical assistance in managing a more age diverse workforce, changing attitudes about workplace flexibility, identifying and sharing best practices, and, most importantly, in restructuring jobs and workflow to accommodate the changing nature of Arizona's workforce. They also asked that skills training for mature workers be more readily available and affordable. Of special interest to all was the availability of training for mature workers to gain the technology skills they need in today's workplace.
- Linkages between Employers & Mature Workers – While nearly all of the business leaders involved recognized the value of mature workers in their operations, finding ways for businesses and mature workers to connect with each other that does not violate EEO, FLSA, and other important anti-discrimination protections, is an issue. Both businesses and workers in all three summits expressed the need for a web-based mechanism where jobs and resumes could be posted that would be friendly to mature workers (i.e. you don't have to be a technology wiz to use it), and efficient for businesses. Many did not consider existing commercial ventures, such as Monster.com, adequate. Input from two of the summits indicated that this mechanism should NOT be government based, while one summit's input was that it didn't matter where it was housed, so long as it had credibility with businesses and mature workers alike.

- Innovations & Incentives – The participants in the three Summits came up with a number of innovative ideas about how they could attract and retain mature workers, including offering cafeteria benefits/pay plans, using mature workers as mentors, providing phased retirement options, hiring retirees back as consultants, and looking at part-year residents as an additional workforce. While implementation of most of these ideas lies in the hands of business, technical assistance, as discussed earlier, would be a critical factor. However, it was frequently noted that some businesses will want or need more assistance, and perhaps even incentives, before they can retool their jobs to meet changing interests of older workers.
- Policy & Regulatory Changes – While many of the policy changes that were discussed at the three Summits are based in federal law, the Summit participants still asked for the Governor to use the power of the Governor’s Office to advocate for and, where possible, make changes to state and federal policies and regulations that limit employment of mature workers. While increasing the earnings cap on pensions and Social Security is certainly a federal issue, other concerns fall under the purview of both the state and federal jurisdictions, so are discussed here. Of major concern was the frequent cost disincentive in health care plans when the average age of a company’s workforce increases. Thus, the more mature workers a business hires, the more expensive their health plans become, even though there are now studies that show that older workers do not necessarily use more health care than younger people with children. Another expressed concern was the fear that hiring more mature workers could result in more litigation around age discrimination. In particular businesses were concerned that if they needed to dismiss an older employee who was not performing or was under performing, that they would increase their risk of being sued. However, there was equal discussion that properly documented personnel practices should take care of it, but some business leaders expressed that the public perception of wrongdoing was the issue, even if the lawsuit was dismissed.

While there was a lot of consistency about these priority areas throughout the three Summits, **there was no clear consensus about the *priority* of these 5 areas.** All five areas were important to the participants, and the recommendations seem to build on each other rather than standing alone. Thus, they are listed in no particular order.

The Summit participants and the Mature Workers Committee of the Governor’s Advisory Council on Aging stand ready to implement the next steps in the Arizona Mature Workforce Initiative.

Arizona Mature Workforce Initiative



Implementation Strategy Recommendations

Spring 2006



Arizona Mature Workforce Initiative: Implementation Strategy



After 18 months of work on the Arizona Mature Workforce Initiative, a number of opportunities have developed which serve as excellent initial implementation steps from the Mature Workforce Summits. Each implementation corresponds to one of the 5 priority areas from the Mature Workforce Summits discussed above. The following implementation strategies the next steps in the Arizona Mature Workforce Initiative:

Priority Area: PUBLIC AWARENESS & EDUCATION

Implementation Strategy: Launch a Mature Workforce Public Awareness Campaign

Concept: Under the auspice of the Mature Worker Committee of the Governor’s Advisory Council on Aging, a public awareness campaign will be launched. The campaign would leverage the membership of the Committee, including the public and private sectors, and call upon our national partners, AARP and the National Governors Association, to assist in the effort to raise the public’s awareness about the opportunities and challenges of an aging workforce. The campaign will include regular articles in newspapers, business journals, presentations at business and aging conferences, and where financially feasible, media spots on television and radio. The campaign will generate tools that could be used in local media markets, as well as be replicated by other states.

Priority Area: TRAINING & TECHNICAL ASSISTANCE

Implementation Strategy I: Create the Arizona Workforce Transition Center

Concept: Under the leadership of GateWay Community College, and with local foundation and business support, Arizona’s first Workforce Transition Center will be established. The Workforce Transition Center will assist mature workers who wish to transition from their current situation (whether employed or not) to a new career. Accessible from any place in the country, an assessment of skills and interest can be performed and one-on-one counseling and guidance will be provided to help identify the skills the worker needs in order to make a successful transition. The Arizona Workforce Transition Center will then link the worker with the appropriate Arizona training program – through GateWay, another community college, or one of the state’s one-stop workforce centers, where they can gain the necessary skills for their career transition.

Initial focus for career transitioners will be: education, healthcare, and social service. Given that Arizona has a shortage of workers in all three of these areas, this focus makes sense. In addition to attracting transitioning workers, this program is also expected to attract businesses looking for ways to retain older employees, or that are looking to fill vacancies.

Implementation Strategy II: Explore Feasibility of Establishing a Mature Workforce Technical Assistance Position in the Dept. of Commerce

Concept: Work with the Department of Commerce to determine the feasibility of establishing a position or portion of a position to work with businesses to identify best practices and assist businesses seeking to retool their jobs in light of an aging workforce. This would include workplace flexibility concepts such as job sharing, flex time, use of technology, etc.

Priority Area: LINKAGES BETWEEN EMPLOYERS & MATURE WORKERS

Implementation Strategy: Establish a Mature Worker Job Bank

Concept: A sub-committee of the Governor’s Advisory Council on Aging’s Mature Workforce Committee will coordinate with members of the Governor’s Council on Workforce Policy to take the lead in investigating and analyzing the possibilities and obstacles for a centralized mature worker job bank. It is important that the entity managing the job bank has both the reputation and resources to provide excellent and reliable service and can do so at nominal or reasonable costs. There are many possibilities for this strategy, including possible partnerships with national organizations. The Mature Worker Committee will investigate the options and make a final recommendation.

Priority Area: INNOVATIONS & INCENTIVES

Implementation Strategy: Create a Mature Worker Friendly Business Designation

Concept: Much like the concept of the Good Housekeeping Seal of Approval, the Mature Worker Friendly designation would be a designation that the Dept. of Commerce would award any business that met a standard set of criteria that reflect the company’s understanding and attention to the unique needs of an aging workforce. A joint committee comprised of representatives from the

public and private sectors, similar to the groups created for the Mature Workforce Summits, would establish a set of standards. The standards might include concepts such as workplace flexibility and diversity training.

Application for the designation would be completely *voluntary*. A minimal level of continuing education may be required as part of the free designation, such as attendance at a free seminar as part of the Governor's Conference on Aging or other business conference every 2 years. If successful, Arizona would be the first state in the country to develop this type of designation.

Priority Area:

POLICY & REGULATORY CHANGES

Implementation Area: Call for Changes to National Policies Related to an Aging Workforce

Concept: The Governor will call upon AARP, The National Governor's Association, and other national groups to take a critical look at national policies that limit older people's abilities to work, limiting factors for businesses related to an aging workforce, and then recommend and pursue actions to eliminate those barriers. National organizations will be asked to analyze the issues and offer suggestions for state and federal action to address policy barriers related to an aging workforce.

Conclusion

This set of implementation strategies are meant to compliment each other and provide a comprehensive approach to addressing the input received from the Arizona Summits on the Mature Workforce. However, they are but a beginning of a multi-year effort needed to address the sweeping and significant changes to Arizona's population and workforce. The goal of the Arizona Mature Workforce Initiative has always been to increase employment opportunities for mature workers while assisting Arizona businesses to manage the changes that come with an aging workforce. Building on existing infrastructure and collaborating across systems will serve as the essential key approach to achieve lasting system change.

APPENDICES



GOVERNOR'S ADVISORY COUNCIL ON AGING

MATURE WORKFORCE QUESTIONS FOR EMPLOYERS

*Please answer the following questions in the space provided.
If more space is required, attach additional sheet of paper.*

1. What impact will aging of the workforce have on staffing in your industry?
2. What intergenerational issues affect your workforce?
3. What needs do you or your customers have that you are unable to meet because your employees don't have the necessary skills?
4. What can be done to help aging members of the workforce to better meet the needs of your customers?

Equal Opportunity Employer/Program

Under Titles VI & VII of the Civil Rights Act of 1964 (Title VI & VII), the Age Discrimination in Employment Act (ADEA), and the Americans with Disabilities Act of 1990 (ADA), the Department prohibits discrimination in employment, programs, services or activities based on race, color, religion, sex, national origin, age, and disability. The Department must make a reasonable accommodation to allow a person with a disability to take part in a program, service or activity. For example, this means that if necessary, the Department must provide sign language interpreters for people who are deaf, a wheelchair accessible location, or enlarged print materials. It also means that the Department will take any other reasonable action that allows you to take part in and understand a program or activity, including making reasonable changes to an activity. If you believe that you will not be able to understand or take part in a program or activity because of your disability, please let us know of your disability needs in advance if at all possible. This document is available in alternative formats by contacting (602) 542-4710.



GOVERNOR'S ADVISORY COUNCIL ON AGING

The Bureau of Labor Statistics estimates that by 2010, workers age 55 and older will comprise 20% of the work force (compared to 13% in the year 2000), and the U.S. will face critical shortages of qualified workers. To raise the awareness about this issue, the Mature Worker Committee of the Governor's Advisory Council on Aging is working to learn more about barriers that may affect employers and mature workers. The information obtained from the following survey will be helpful as Arizona continues to plan for the future. Thank you for your participation.

WORKFORCE QUESTIONS FOR MATURE WORKERS

1. Are you currently employed (paid or unpaid)? Yes ___ No ___

2. Are you currently looking for employment? Yes ___ No ___

3. With all else being equal, would you accept a position with a company that requires new employees to complete a training program if that training would better prepare you for that position:

If you were paid to attend the training program? Yes ___ No ___

If you were not paid to attend the training program? Yes ___ No ___

4. Please rank the following factors that are most important to your satisfaction with a job. Rank from 1 - 7 (1= most important, 7= least important):

- Salary _____ Meaningful work _____
Medical Benefits _____ Opportunity to learn new things _____
Vacation and Sick Leave _____ Recognition _____
Flexible Schedule (part-time, weekend hours available, etc.) _____

5. Would you be comfortable answering to a supervisor younger than yourself? Yes _____ No _____

6. What are the top 3 problems you face as a mature worker when seeking a job?

- Low Pay _____ No schedule flexibility _____
Poor benefits _____ Only entry level positions available _____
Considered "overqualified" _____ Stereotypes about older people _____
No promotional opportunities _____

7. As a mature worker, do any of the following factors affect your ability to work? If so, check up to 3 factors from the list below:

Low confidence	_____	Need for new skills/training	_____
Resume needs updating	_____	Interviewing skills are not good	_____
Discouraged	_____	My schedule is not flexible	_____
Wish I didn't have to work	_____	Health problems	_____
Need transportation	_____	Caregiving responsibilities	_____
Don't know where to get the help I need	_____	None of the above	_____
		Other	_____

Your Age Range:

Under 50	_____
50 – 54	_____
55 – 64	_____
65 and over	_____

Gender:

Male	_____
Female	_____

NOTE: Results of this survey will be used as input into mature worker projects across the state. Participation in this survey is strictly voluntary and completely anonymous. Thank you.

Equal Opportunity Employer/Program

Under Titles VI & VII of the Civil Rights Act of 1964 (Title VI & VII), the Age Discrimination in Employment Act (ADEA), and the Americans with Disabilities Act of 1990 (ADA), the Department prohibits discrimination in employment, programs, services or activities based on race, color, religion, sex, national origin, age, and disability. The Department must make a reasonable accommodation to allow a person with a disability to take part in a program, service or activity. For example, this means that if necessary, the Department must provide sign language interpreters for people who are deaf, a wheelchair accessible location, or enlarged print materials. It also means that the Department will take any other reasonable action that allows you to take part in and understand a program or activity, including making reasonable changes to an activity. If you believe that you will not be able to understand or take part in a program or activity because of your disability, please let us know of your disability needs in advance if at all possible. This document is available in alternative formats by contacting (602) 542-4710.



CENTRAL ARIZONA SUMMIT ON THE MATURE WORKFORCE

November 16, 2005
Glendale Civic Center
Glendale, AZ 85301
8:30 a.m. – 1:30 p.m.

AGENDA

- 8:30 – 9:00am Registration & Continental Breakfast
- 9:00 – 9:30am **Opening Session** (Garnet/Emerald Ballroom)
- Welcome: The Honorable Elaine Scruggs
 Mayor, City of Glendale
- Mature Worker
 Perspective: Dj Salas
 Mature Worker
- Business
 Perspective: Joe Tuerff
 Phoenix Regional Director
 Manpower, Inc.
- 9:30 – 9:45am Move into Discussion Groups (see map on back of agenda)
- 9:45 – 11:15am **Interactive Strategy Development Discussions**
- 11:15 – 11:30 Break
- 11:30am – 12:00pm Large group report-out (Garnet/Emerald Ballroom)
- 12:00pm – 1:30pm **Luncheon** (sponsored by AARP Foundation) – Garnet/Emerald
- Keynote Speaker:
 Governor Janet Napolitano
- 1:30pm Adjourn – **Thank You for Your Participation!**



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GOVERNOR'S ADVISORY COUNCIL ON AGING



Hiring More Mature Workers: Obstacles Cited by Employers

- A. Health insurance & other benefits for mature workers are more expensive.
- B. As average age of employees rises, insurance costs go up.
- C. Many mature workers lack necessary technological skills.
- D. Concerned that younger managers will not be able to supervise MWs.
- E. Jobs are not currently structured for part-time and/or flexible schedules.
- F. Believe that more training must be provided to mature workers.
- G. Jobs may require physical abilities beyond mature workers' abilities.
- H. Believe that many mature workers want higher salaries when returning to work, even if starting at non-executive levels.
- I. Mature workers often lack diversity education and understanding of cultural, language, and modern workplace issues.
- J. Afraid of lawsuits around age-related issues.
- K. Believe that mature workers have more health issues than younger workers.
- L. Concerned that mature workers have fewer years to work and training investment is not worth it.
- M. Mature workers are more likely to have eldercare issues that interfere with their ability to work.



Finding Meaningful Employment: Obstacles Cited by Mature Workers

- N. Flexible schedules are not often available.
- O. Lack of respect by co-workers is common.
- P. Available jobs do not always provide opportunity to use skills & talents in a worthwhile endeavor.
- Q. Employers are often unwilling or unable to provide benefits to mature workers, even though benefits (esp. health care) are often more important than salary.
- R. Esp. in Arizona, part-year residency may be an issue.
- S. Many positions require higher levels of supervisory responsibilities than sought by MWs.
- T. Employers are not willing to provide the necessary training.
- U. Jobs often require high-tech skills.
- V. Unable to find appropriate level of work for mature workers with technical or professional backgrounds.
- W. Employer stereotypes of older people limit employment opportunities for MWs.

Endnotes

¹ Mitra Toosi, "Labor Force projections to 2012: The Graying of the U.S. Workforce," *Monthly Labor Review*, February 2004. Mitra Toosi, "A Century of Change: The U.S. Labor Force, 1950-2050," *Monthly Labor Review*, May 2002.

² Towers Perrin. "The Business Case for Workers Age 50+: Planning for Tomorrow's Talent Needs in Today's Competitive Environment," AARP: Washington, DC, December 2005.

³ AARP. "American Business and Older Employees: A Focus on Midwest Employers," AARP: Washington, DC, 2005.

⁴ AARP. "Staying Ahead of the Curve: The AARP Work and Career Study," AARP: Washington, DC, 2002.