

Project SILVER

2.3.1.: StAP-Handbook

Christiane Hipp, Brandenburg University of Technology, Cottbus, Germany
Jadranka Halilovic, Brandenburg University of Technology, Cottbus, Germany
Claire McGuire, Brandenburg University of Technology, Cottbus, Germany

Language version EN

Cottbus, June 2013

Table of Contents

<i>Table of Contents</i>	<i>1</i>
<i>1 Introduction</i>	<i>1</i>
<i>2 Creating awareness through tested interventions</i>	<i>1</i>
<i>3 Testing-guide</i>	<i>2</i>
3.1 Practical approach of StAP	4
3.2 Summary	7
<i>4 Conclusion</i>	<i>8</i>
<i>5 Sources</i>	<i>10</i>
<i>6 Further materials linked to the contents of this report</i>	<i>10</i>
<i>APPENDIX</i>	<i>11</i>

1 Introduction

The EU faces the reality of a rapidly ageing workforce, resulting in major gaps in skill levels and in the loss of critical knowledge as older employees retire. The SILVER Project aims to help organizations implement lifelong intergenerational learning (IGL) in the workplace in order to diminish the negative effects of these drastic demographic changes. In this context, it is of great importance to strengthen the awareness of the problem, especially among the participating stakeholders.

Increasing stakeholder awareness to the risk of knowledge loss due to the ageing work force can present both short-term and long-term benefits for companies across many sectors. Identified stakeholders (e.g., HR managers, executives ...) can thus have a positive impact on the corporate culture and the problem itself. Intergenerational learning is not only about reducing knowledge loss in organizations. It is also about knowledge transfer between different age generations, when the organisation contains at least two different age generations. For instance, universities are by their own nature age structured organizations. In such a situation, intergenerational learning contributes to a better use of intangible resources, especially when the management is looking for creating a competitive advantage.

Immediate gains include positive team-building, decreasing old mentalities of individualism and reinforcing knowledge-sharing relationships between employees with varying levels of experience. In the long-term, awareness of IGL can help reinforce company policies of diversity, stimulate knowledge creation and innovation, and provide efficient methods of training new employees. Other benefits of IGL are knowledge building, knowledge transfer, knowledge retention, innovation, as well as an improvement of social relations between generations.

Results of our project show that initializing a stakeholder awareness program in a company or in a not-for-profit organization is most successful when the organization has already acknowledged the problem of knowledge loss, has a significant percentage of employees approaching retirement age, or is looking for efficient knowledge leverage. Although the specificities vary depending on economic sector and organisation type, the driving force behind successful stakeholder awareness lies in a cooperative managerial hierarchy, decision-maker support and openness to developing new methods of staff development and strategic thinking.

Nevertheless, this manual can also help those who are less likely dealing with this problem. Here, strengths and obstacles of each method are presented, and a toolbox that can be used by the organisations is provided.

2 Creating awareness trough tested interventions

The Stakeholder Awareness Program (StAP) is a systematic tool to raise awareness about the demographic changes, as well as a tool for the assessment of the current age spectrum dynamics in the organisation.

Why should StAP be performed? The reasons for this vary. In the coming years, organisations of all sizes and in various sectors throughout Europe will be affected by demographic changes and by the ageing of the workforce. A lack of awareness and understanding of the consequences of these changes, as well as a lack of awareness of the benefits, conditions for and possible barriers to IGL will result in IGL and other measures occurring unsystematically, too late or not at all. This leaves organisations vulnerable and unprepared for the effects of the earlier mentioned demographic

changes. So the purpose of the collaboration may be different, but the results are usually equal to raise awareness of the issue (see figure 1).



Figure 1: Main purposes for raising awareness among stakeholders

The main intended goal of the StAP is to reverse a lack of awareness and to lay down the groundwork for the preparation, acceptance and implementation in the workplace of specific IGL measures, as well as additional measures to manage the demographic change on a broader level. Note that the StAP is a diagnostic tool as well, as it provides information regarding on the current state of affairs in organisations. The StAP prepares the realization of effective IGL-measures in organisations.

3 Testing-guide

A key tool is the level of awareness-scan, because much of the most essential information is collected. These form the basis for further work in inter-generational learning. Below is a recommended testing-guide which has been derived from the experience of the project. The phases of the program are presented in the following figure.

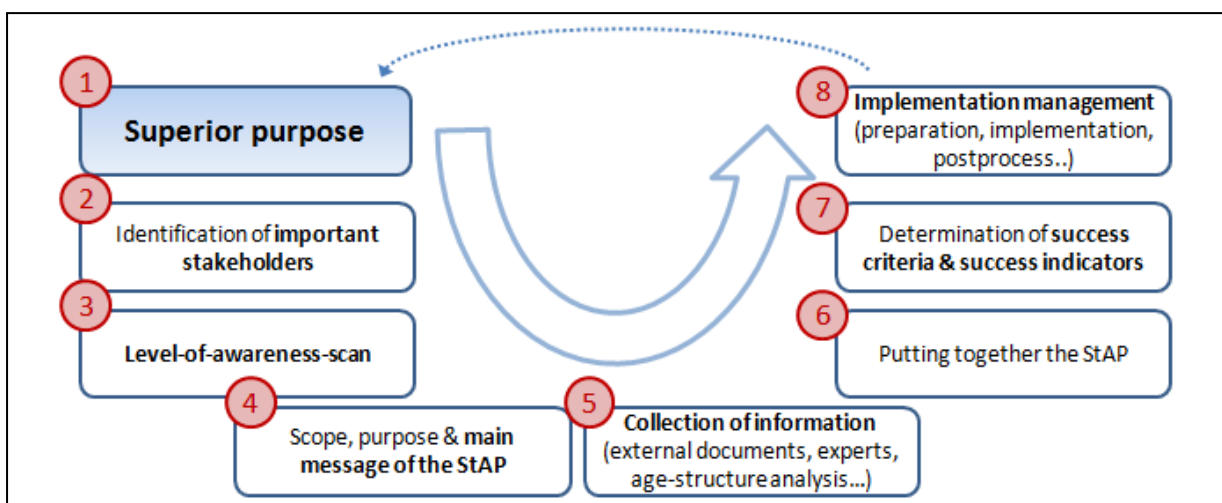


Figure 2: Phases of the Stakeholder Awareness Program

Phase 1: The first step is to *define the ultimate reasoning behind why IGL is being considered*. In order for this process to begin, there must be at least one person in the organisation (i.e. the “actor”) with a certain decision-making power who recognises the need to implement IGL in order to deal with a current or future problem. This person should work together with members of the organisation to define the superior purpose of preparing for and implementing IGL. Testing has shown that it is helpful to seek out decision-makers that have already shown interest in IGL activities, for example through previously-established diversity programs or an by taking an active position in Human Resources development.

Phase 2: The next step is to *identify all of the stakeholders* who should be taken into account if an IGL measure would be implemented in the particular organization (i.e. the targets of your StAP campaign). When identifying the stakeholders, it is important to be as specific as you can be, naming them whenever possible. The campaign should not focus on all prospective stakeholders, but only on the most important stakeholders. Furthermore, the management should now introduce the actors to the members of the organisation (particularly the identified stakeholders). For instance, a team meeting can be used here.

Phase 3: The next step is to *determine the level of awareness that they already have*. Each stakeholder needs to be aware of the issues and important factors regarding IGL. The levels of awareness include the following:

Level 1: Awareness of the age spectrum dynamics within organisation

Level 2: Awareness of the usefulness of IGL as a possible solution to increase the efficiency of using knowledge resources, and in reducing knowledge loss through employees retirement.

Level 3: Awareness of increasing diversity and its consequences in organizations in general and age-diversity in particular.

Level 4: Awareness about the goals, benefits, conditions for and potential barriers of implementing IGL

Note: *The four levels of awareness are a basis of the project. While theoretical, they do serve to show different stakeholders' possible amount of involvement. On the other hand, we found that it is also possible to do IGL in organizations with either differing levels (between the generations for example) or with organizations at lower levels. The scan is thus a tool that is in itself an intervention and not a scientific instrument.*

Phase 4a: Now that the current level of awareness of the stakeholders is known, the next step in the design process is to *determine the scope of your StAP campaign*. The final aim is to achieve awareness on all levels so that the stage is set for the introduction of IGL. The actor should start by focusing on the lowest level and work his/her way up to the highest level of awareness. Once one level of awareness is reached, it serves as a pre-condition for obtaining awareness on a higher level.

Phase 4b: It is now important to *ascertain and formulate the purpose of the StAP interventions*. For example, the purpose of a StAP intervention might be simply about building awareness amongst managers, or about the needs of different generations within the organisation. Based on the analysis conducted in phase 3, the initiators of the StAP should now also be able to define the main message or messages of the StAP.

Phase 5: The next step in the design process is to collect sufficient data so that you will be able to *provide the necessary contextual information for each level of awareness*

Phase 6: In phase 6, *the optimal type of StAP campaign should be selected* based on the target group(s) (stakeholders), their level-of-awareness, the refined aims of the campaign and the results of the information collected in earlier steps (contents). Consider the sector and whether the organisation is structured based on an age hierarchy or on technical experience, which the testing has shown to be pivotal in adapting a campaign to fit specialized needs. For example, organisations with a high degree of individualism could benefit more from group workshops. Examples are listed below.

- Facts: results of research and best practices
- Experience: around generations and intergenerational learning
- Decision-making-tools: when and how to use IGL in organisations
- Getting more data: scans and other tools to generate and analyse data about the need for IGL in organisations.
- Training: on how to do IGL.
- Bringing people together: discuss the goals, benefits, possibilities or potential barriers of intergenerational learning.
- Communication: mass-/ personal communication, education, public relations (PR) and advocacy/lobbying

Phase 7: The success criteria for the StAP as well as their assessment have to be determined. Based on the intended and expected results, it is necessary to specify (i) at what point in the process they should be achieved, and (ii) what indicators might be used to measure them.

Indicators for the success of StAP interventions and the means of measurement can vary depending on the context. Also, a differentiation between criteria for short-term and long-term success is needed to plan the evaluation. A further orientation along the evaluation guidelines of Kirkpatrick (2000) might be useful here, differentiating between the evaluation levels (i) reaction, (ii) learning, (iii) behaviour, and (iv) organisational results.

Phase 8: The eighth and final phase is planning the management of the implementation of the StAP. A very important part of this phase is to link back to the general purpose (see phase 1) and thus, to prepare doing IGL.

3.1 Practical approach of StAP

The StAP process makes use of different tools, including a Level-of-Awareness scan, a broad organisational questionnaire, and a workshop to reduce prevalent age-stereotypes (Appendix 1). By first determining the level of awareness among staff members and accessing their perceived barriers to intergeneration learning, a plan of action for increased stakeholder awareness can be better drafted. Through this method, problems and barriers to stakeholder awareness can be pre-emptively identified and corrected for. It is also noted that determining the age spectrum of staff in relation to position is helpful, especially in the age structured organizations, like in universities. Methods that have proven effective for conducting the initial scan are varied, but all require the establishment of a relationship with adequate communication between the Director/CEO, managerial staff, human resources and the staff participants. In the following illustration, the initial process is shown.

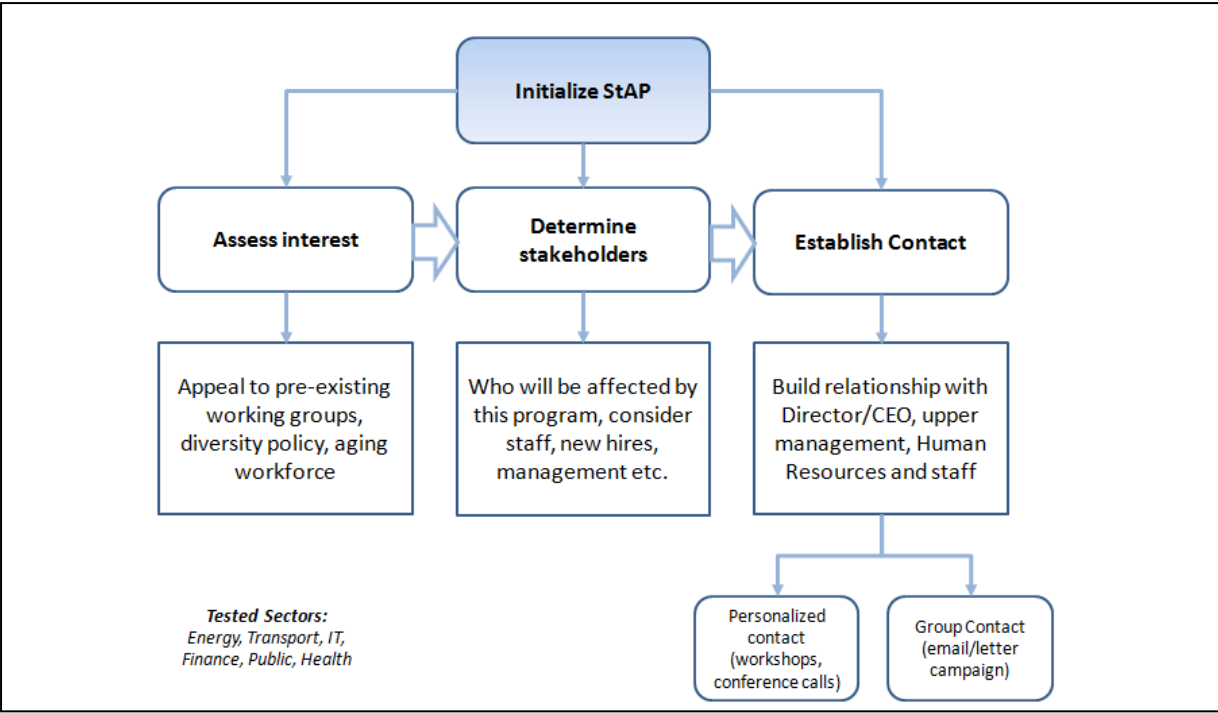


Figure 3: Starting Stakeholder Awareness Process (StAP)

How it works

The information received from the Level-of-Awareness scan questionnaire, as well as the response rate itself, is averaged to determine the overall level of awareness among the staff of IGL’s importance. A separate questionnaire specifically targeting the decision-makers can be useful to judge opinion on the need for intergenerational learning on an organizational level. Methods for carrying out the scan vary by individual situations, but several methods used in the testing phase included Human Resources distributing the questionnaire via email, interviews in person, or by phone, Skype or Vivo, and holding a workshop that includes completing the questionnaire as an activity.

Results show that the best response rate came from those scanning methods that were carried out in person rather than by email, due to the personalized interaction, which encourages participation. The following figure shows the key success factors and barriers of each method. Depending on the size of the group and the purpose, that approach can be varied.

The personal interaction takes time, but in return provides a very good response rate. **Best practice tests** have shown that an optimal StAP workshop should take anywhere from 5-8 hours, including other aspects from the IGL Toolkit. Individual interviews depend on the willingness of the participants and can be completed in 1 to 4 hours. The impersonal contact via mail / letter can reach more people and requires less time. The disadvantages are possible lack of motivation and poorer response rate.

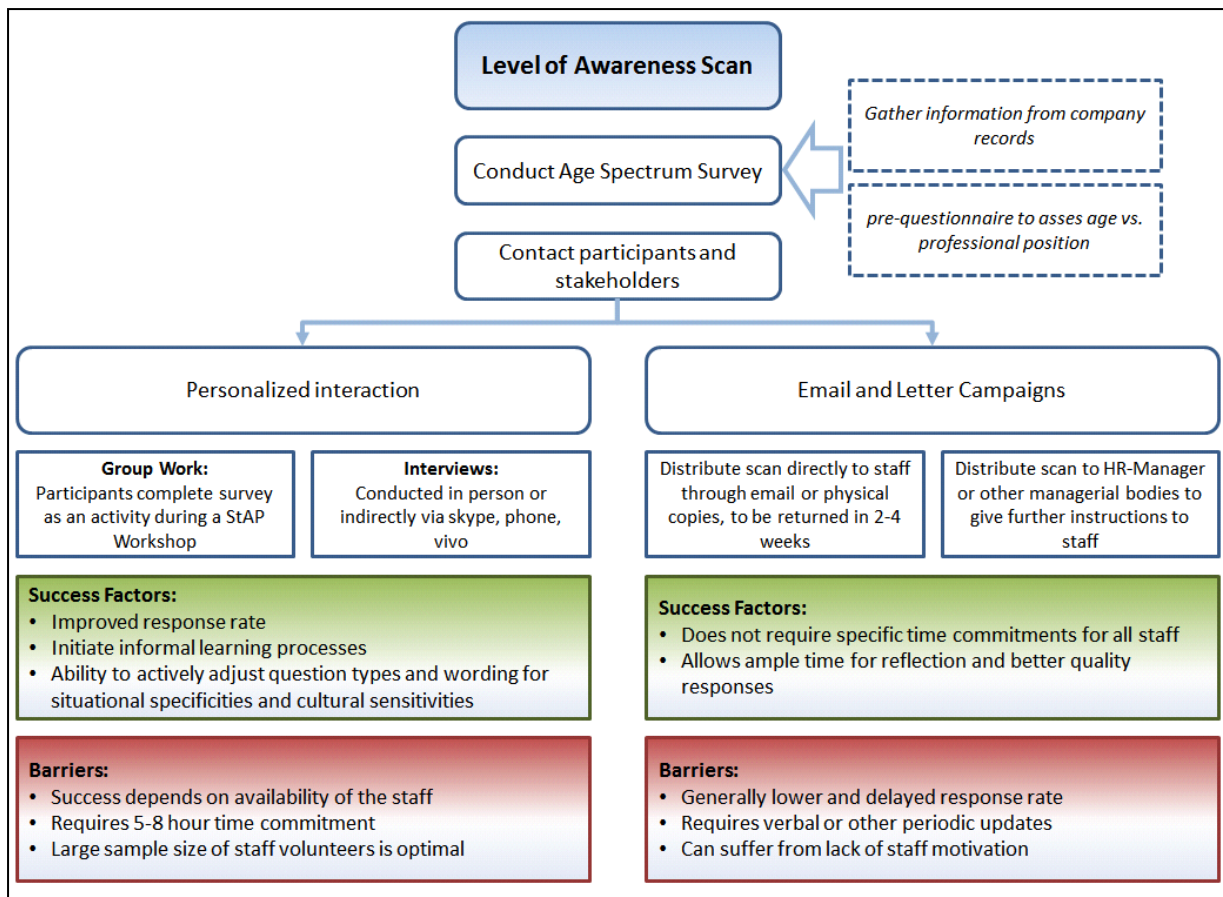


Figure 4: Different approaches for doing the Level-of-awareness-scan

The following **insights came from testing**:

- Staff with a high percentage of older workers that are approaching retirement age tend to be more willing to cooperate.
- Surveying as large of a group as possible leads to the most accurate results, but employees who volunteer themselves for participation tend to return more valid data with a higher response rate.
- Scans that were not completed on the spot were noted to require 2 - 4 weeks to complete, and given to staff who were properly informed of the project by management.

Time management for the stakeholder awareness program is an important factor in its successful implementation. Adjustments to specific contexts will be needed, but implementation ranges from x to y. In some cases it took six months from the first meeting to the actual scan.

Example of designing a StAP workshop

Conducting a StAP Level 3 Awareness Workshop has been reported to have positive results in terms of response rate for the Level of Awareness Scan. It revolves around a focus on group work and participation, usually in a lighthearted way. These fun exercises then help staff reflect on negative stereotypes and behaviors in the office, and lead to a discussion on current problems and their potential solutions. By offering the StAP Level of Awareness Scan as an activity during a workshop, a high response rate is guaranteed. It was found that a more productive workshop is put on with a

large group of volunteers, or interested participants. However, it should be noted that this form of Awareness raising requires a 5-8 hour time commitment on the part of the staff.

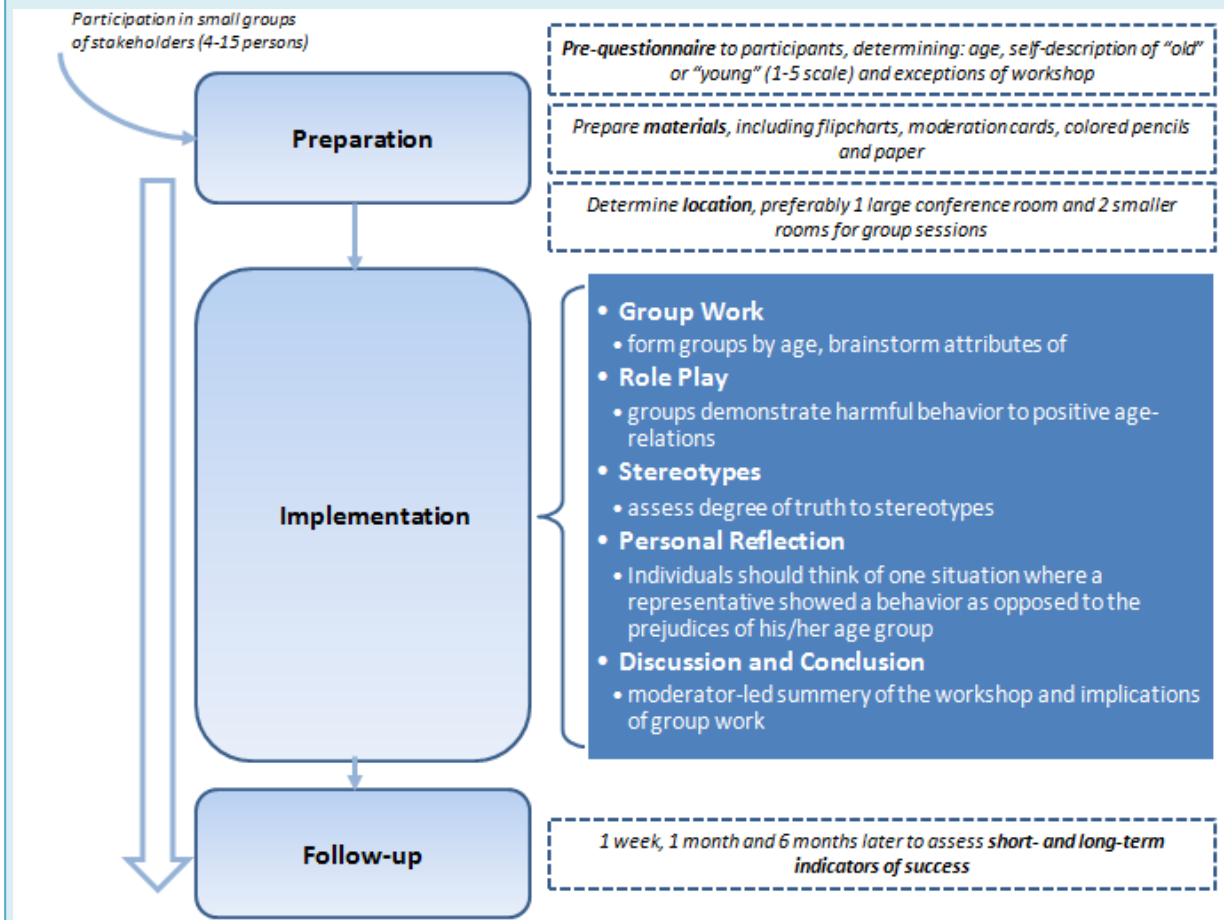


Figure 5: Possible variation of the StAP

3.2 Summary

The scans provide a basis for the implementation of various programs. They are so important because they can draw attention to several things: is the problem of the aging workforce, as well as its consequences, widely known? Is there an understanding of intergenerational learning and if so, how it is pronounced? Is the company's communications transparent? What further problems / opportunities affect the company's employees? However, the StAP offers more relevant results than just the answers to these questions. The StAP and the scans also have an important side effect: increased appreciation and concurrent knowledge exchange.

The proposed measures are only one method of IGL. It is important to emphasize that the action must *always be adapted to the environment, the organisation and the employees*. Accordingly, the objective of the approaches may vary from those shown. Nevertheless, the key success factors and barriers are presented from the project experience in the following.

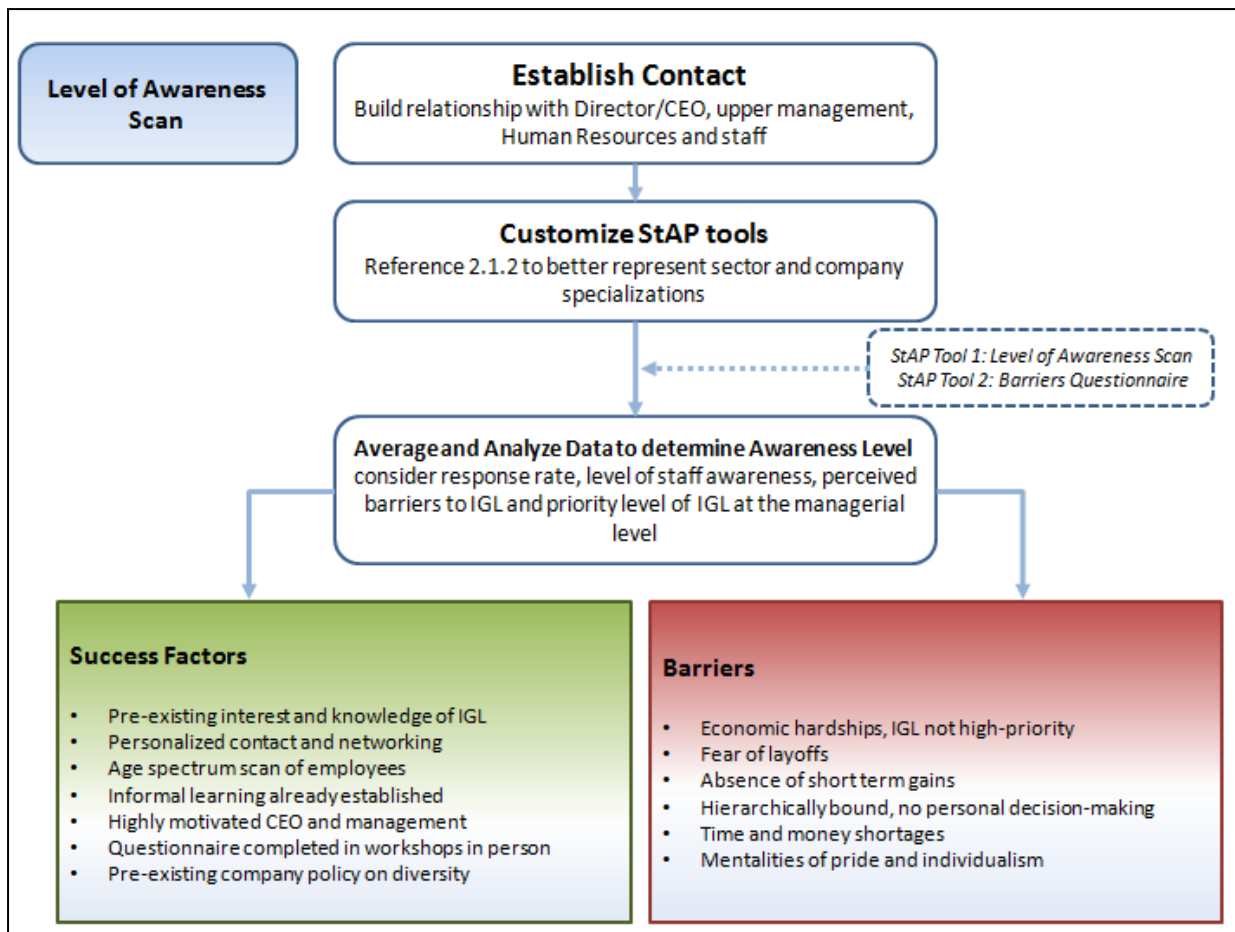


Figure 6: Summary of Success factors and barriers

The results of the scan can be used to identify stakeholders and initiate the next steps. They can serve as a basis for appropriate measures of IGL:

- Intergenerational Teams
- Intergenerational Mentoring
- Intergenerational Training & Workshops
- Intergenerational Knowledge Capturing

4 Conclusion

As Europe continues to experience demographic change and deal with the realities of an ageing population, IGL and other measures to manage the demographic change are becoming increasingly important in both social and professional settings.

The **main results of our testing** show the critical success factors (Table 1).

Time	<ul style="list-style-type: none"> – a critical resource which can be adapted – purpose and goals determine the use of IGL – even small, short units of 2-4 hours can deliver effective results
Organization	<ul style="list-style-type: none"> – an open and trusted corporate culture helps in the implementation of IGL – efficient communication – strategic thinking: the structure should allow IGL
Staff	<ul style="list-style-type: none"> – decision makers-' awareness

	<ul style="list-style-type: none"> – better results are obtained with willed personnel – People should be willing to share their knowledge
Methods	<ul style="list-style-type: none"> – should be adapted to the organization – the project offers a variety of methods that can be adapted to the purpose and organization

For the implementation of the measures there is no need for large investments. Respect, trust and open communication and are side effects of StAP.

5 Sources

Kirkpatrick, D. L. (2000). Evaluating training programs: The four levels. In G. M. Piskurich, P. Beckschi & B. Hall (Eds.), *The ASTD handbook of training design and delivery: A comprehensive guide to creating and delivering training programs, instructor-led, computer-based, or self-directed* (pp. 133-146). New-York: McGraw-Hill.

6 Further materials linked to the contents of this report

The SILVER project homepage provides tools to implement the StAP design in organizations. The tools are for the use of experienced trainers. Experiences with the tools are presented on the homepage too. See <http://www.intergenerationallearning.eu>

The materials are:

- StAP tool 1: Level-of-awareness scan (phase 3)


APPENDIX

The appendix presents materials for the actors. The materials will support the application of the StAP

App. 1 Level-of-awareness scan (phase 3)

Appendix 1: Level-of-awareness scan (phase 3)

This appendix presents a **questionnaire approach** to scan the prevalent level of awareness of the identified stakeholders. The important stakeholders who should be taken into account or representatives of the important stakeholders should answer following questions.

	<p>Level-of-awareness scan: Please answer the following questions. Answer as honest as possible. When there is no indication of number of answers, write down as much answers as come to your mind.</p>														
<p>1. <i>What are the most important challenges in your society for the next 10 years? Please write them down.</i></p> <hr/> <hr/> <hr/> <hr/> <hr/>															
<p>2. <i>Please indicate the urgency of the following aspects for your society (on a 1 to 10 rating scale):</i></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 5px;"><i>Aspects of society</i></th> <th style="text-align: left; padding: 5px;"><i>Urgency: 1/ not at all urgent to 10/ extremely urgent</i></th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">Increased international competition</td> <td style="width: 200px;"></td> </tr> <tr> <td style="padding: 5px;">Ageing of the work force</td> <td></td> </tr> <tr> <td style="padding: 5px;">Globalization</td> <td></td> </tr> <tr> <td style="padding: 5px;">Shrinking of labor force</td> <td></td> </tr> <tr> <td style="padding: 5px;">Technological change</td> <td></td> </tr> <tr> <td style="padding: 5px;">Decrease in birth rates</td> <td></td> </tr> </tbody> </table>		<i>Aspects of society</i>	<i>Urgency: 1/ not at all urgent to 10/ extremely urgent</i>	Increased international competition		Ageing of the work force		Globalization		Shrinking of labor force		Technological change		Decrease in birth rates	
<i>Aspects of society</i>	<i>Urgency: 1/ not at all urgent to 10/ extremely urgent</i>														
Increased international competition															
Ageing of the work force															
Globalization															
Shrinking of labor force															
Technological change															
Decrease in birth rates															
<p>3. <i>Think about demographic change. What are the particular consequences for your organization/ the organization under consideration?</i></p> <hr/> <hr/> <hr/> <hr/> <hr/>															
<p>4. <i>Why do you think age is an aspect that needs attention for organizational decision and processes?</i></p> <hr/> <hr/> <hr/> <hr/>															

<hr/>
<p>5. Does your organization have information available about the current age structure within your organization as well as within particular parts of your organization? (Multiple answers possible)</p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes (organization) <input type="checkbox"/> Yes (particular parts of the organization)</p>
<p>6. Does your organization have information available about the prospective age structure within your organization as well as within particular parts of your organization? (Multiple answers possible)</p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes (organization) <input type="checkbox"/> Yes (particular parts of the organization)</p>
<p>7. How often does your organization conduct age structure analysis?</p> <hr/>
<p>8. For whom are the results of age-structure analysis available?</p> <hr/>
<p>The definition of IGL maintained by the SILVER project members is: "IGL is the process of knowledge building, innovation and knowledge transfer that takes place through lifelong learning among the different cohorts found in an organization".</p> <p>9. In your own words: What is IGL?</p> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>10. Which IGL-measures do you know? Give a short description of each IGL-measure you know.</p> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>11. What are the positive consequences of doing intergenerational learning (IGL) for the organization?</p> <hr/> <hr/> <hr/> <hr/> <hr/>

12. What are the benefits of doing IGL for employees?

13. What are the positive consequences of doing IGL for other parties (indicate beneficiaries too)?


14. What are the negative consequences of doing IGL?

15. In your opinion, what are important conditions of doing IGL in organizations?

16. In your opinion, what are supportive factors for doing IGL in organizations?

17. In your opinion, what are barriers for doing IGL in organizations?

The analysis of the scan requires some qualitative categorizations and classifications, to indicate the current level-of-awareness of each stakeholder or stakeholder group. The analysis contains the following.

	<p>Level-of-awareness scan: Analysis of the answers for each stakeholder/ stakeholder group.</p>
<p>Level-1-awareness: questions 1, 2</p> <p>Question 1: Categorize open answers</p> <p>→ Is demographic change or something related (e.g., ageing of population) mentioned?</p> <p><input type="checkbox"/> Yes: Level-1-awareness</p> <p><input type="checkbox"/> No: Level-1-awareness StAP necessary</p> <p>Question 2:</p> <p>→ How is “ageing of the workforce” rated?</p> <p><input type="checkbox"/> 8 to 10: Level-1-awareness</p> <p><input type="checkbox"/> < 8: Level-1-awareness StAP necessary</p> <p>→ Are the demographic-change-issues judged as being as important as the other issues (+) or constantly lower (-)?</p> <p><input type="checkbox"/> (+): Level-1-awareness</p> <p><input type="checkbox"/> (-): Level-1-awareness StAP necessary</p>	
<p>Level-2-awareness: question 3</p> <p>→ Categorize open answers in terms of: ageing of staff, generation diversity, knowledge-loss/-transfer, personnel recruitment, further training issues; add more categories representing the answers</p> <p>→ Are all mentioned categories of consequences mentioned?</p> <p><input type="checkbox"/> Yes: Level-2-awareness</p> <p><input type="checkbox"/> No: Level-2-awareness StAP necessary</p> <p>→ Are ageing of staff and knowledge-loss/-transfer mentioned [both indicators for IGL-importance]?</p> <p><input type="checkbox"/> Yes: Level-2-awareness</p> <p><input type="checkbox"/> No: Level-2-awareness StAP necessary</p>	
<p>Level-3-awareness: questions 4 to 8</p> <p>Question 4: Are age-related prejudices and stereotypes mentioned (-) or are generation-related needs mentioned (+)?</p> <p><input type="checkbox"/> (+): Level-3-awareness</p> <p><input type="checkbox"/> (-): Level-3-awareness StAP necessary</p> <p>Questions 5 to 8: Is the management/ HRM informed about the age structure of the organization (+)? Is the age structure analysis prospective oriented (future scenarios) (+)? Is the age structure analysis available for the employees in the organization (+)?</p> <p><input type="checkbox"/> 3 x (+): Level-3-awareness</p>	

<input type="checkbox"/> < 3 x (+): Level-3-awareness StAP necessary
<p>Level-4-awareness regarding processes of IGL: questions 9 to 10</p> <p>Question 9: Does the answer reflect an understanding of IGL as something reciprocal (+) and systematic (+)?</p> <p><input type="checkbox"/> 2 x (+): Level-4-awareness</p> <p><input type="checkbox"/> < 2 x (+): Level-4-awareness StAP necessary</p> <p>→ The definition of IGL maintained by the SILVER project members is: “IGL is the process of knowledge building, innovation and knowledge transfer that takes place through lifelong learning among the different cohorts found in an organization”.</p> <p>Question 10:</p> <p>→ Classify the answers in terms of mentoring, mixed-aged teams, and training/ workshops; add more categories if necessary.</p> <p>→ Are at least three categories of IGL represented and correctly understood?</p> <p><input type="checkbox"/> Yes: Level-4-awareness</p> <p><input type="checkbox"/> No: Level-4-awareness StAP necessary</p>
<p>Level-4-awareness regarding benefits of IGL: questions 11 to 14</p> <p>Questions 11 to 13: Classify the answers for each stakeholder group in terms of: knowledge building, knowledge transfer, knowledge transfer, innovation, improved social relations between generations; add more categories if necessary</p> <p>→ Is every category of potential benefits represented?</p> <p><input type="checkbox"/> Yes: Level-4-awareness</p> <p><input type="checkbox"/> No: Level-4-awareness StAP necessary</p> <p>→ Is there any important stakeholder group without an assigned benefit (-)?</p> <p><input type="checkbox"/> No: Level-4-awareness</p> <p><input type="checkbox"/> Yes: Level-4-awareness StAP necessary</p> <p>Question 14: What negative consequences were mentioned? Anything that indicates a lack of level-4-awareness?</p> <p><input type="checkbox"/> No: Level-4-awareness</p> <p><input type="checkbox"/> Yes: Level-4-awareness StAP necessary</p>
<p>Level-4-awareness regarding factors important for doing IGL: questions 15 to 17</p> <p>→ Classify all answers in terms of: Factors at (i) the level of the organization, (ii) the level of the organizational units & primary task, (iii) interindividual level, (iv) individual level, (v) level of the environment (chapter 2.3 supports your classification)</p> <p>→ Is every level of factors in an organization represented?</p> <p><input type="checkbox"/> Yes: Level-4-awareness</p> <p><input type="checkbox"/> No: Level-4-awareness StAP necessary</p>