Title: Include, Individualize, and Integrate:

Organizational Meta-Strategies for Mature Workers

Guidepost Commentary in *Work, Aging and Retirement*

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Abstract:

In this commentary, we synthesize the literature on mature workers in organizations to support the development of an intervention-focused research program. We identify three broad approaches, or "meta-strategies", which theory and research suggest organizations can use to reap the benefits associated with a mature and age-diverse workforce. "Include" involves strategies to create an inclusive climate in which mature workers are welcomed and fairly treated and is based on theories such as optimal distinctiveness theory. "Individualize" involves strategies to adapt the work to meet the individual needs and preferences of an ageing workforce, such as work redesign and is based on theories about how people change over the lifespan. "Integrate" involves strategies to address the greater age diversity that comes with an ageing workforce, such as how mentoring schemes enable younger and older workers to better learn from each other, and is based on theories such as those concerned with team diversity. We believe that this framework will help organizational decision-makers to think more broadly and more proactively about how to manage, and harness the benefits of, an ageing workforce. Our framework also challenges researchers to give more attention to intervention studies, including considering what configurations of strategies might be most helpful, as well as whether sequencing of strategies is important.

Scholars and practitioners alike have lamented the inadequacy of intervention-oriented guidance to help organizations deal with the ageing workforce. Based on a review of the academic literature, Truxillo, Cadiz, and Hammer (2015) reported extremely limited research on interventions. Practically, our own research has been spurred by this same gap. Based on feedback from government and industry about the need to help organizations better deal with the challenge of an ageing workforce, the Centre of Excellence in Population Ageing Research (CEPAR) included an "Organizations and the Mature Workforce" stream into its program. This new research stream, which we lead, has a core focus on conducting and evaluating organizational interventions.

Organizational interventions should be informed by evidence, and this has led us coming to grips with a diverse and growing set of empirical studies and theoretical perspectives on mature workers. In this commentary we share some of our early sense-making of this literature. We identify three broad sets of approaches, which we refer to as "meta-strategies", that the evidence to date suggests will help organizations to reap the benefits associated with an increasingly mature and age-diverse workforce. To support practical application, we refer to these approaches as "include", "individualize", and "integrate". We briefly elaborate each meta-strategy next (see Table 1 and Figure 1 for further information).

Insert Table 1 and Figure 1 here

"Include" Meta-Strategies

"Include" pertains to the vast body of research on creating an inclusive climate for diverse workers, including mature workers (Boehm & Dwertmann, 2015; Shore et al., 2011).

According to Ferdman (2017, p. 235), "In inclusive organizations and societies, people of all identities and many styles can be fully themselves while also contributing to the larger collective, as valued and full members." Thus, this meta-strategy is about mature workers in an organization being welcomed, accepted, and fairly treated, rather than being excluded as a result of stereotypes or discrimination.

Social identity theory and self-categorization theory (Tajfel & Turner, 1986; Tajfel, 1969; Turner, 1982) exemplify the theories relevant to this meta-strategy. These theories explain how we tend to differentiate ourselves from others on the basis of observable traits such as gender, age, and race and then, since we are motivated to preserve or even enhance our social identities, we are more likely to positively identify with those who are more similar to us yet discriminate against those who are different. The similarity-attraction paradigm (Byrne, 1971) is also relevant, proposing that people are attracted to and prefer to interact with similar others, because such interactions are expected to validate or reinforce one's own attitudes, affect and behaviors.

Taken together, these theories explain the processes by which individuals from diverse social groups, including ageing employees, often end up being excluded from networks of relevant information and participation or opportunities in organizations. Stereotyping, for example, reflects people's tendencies to link particular traits and abilities with particular social groups (Fiske, Cuddy, Glick, & Xu, 2002). Consistent with these theoretical perspectives, much evidence suggests that mature workers are negatively stereotyped and consequently excluded in organizations (Cuddy, Norton, & Fiske, 2005; Jones et al., 2017). For example, inaccurate stereotypes about mature workers are that they are less competent, more resistant to change, and have a lower ability to learn compared to younger workers (e.g., Posthuma & Campion, 2009),

and a meta-analysis showed that age predicts negative evaluation, advancement, and selection outcomes (e.g., Bal, Reiss, Rudolph, & Baltes, 2011).

"Include" strategies are about overcoming these natural processes of identification and categorization into subgroups, which can manifest as stereotypes, discrimination and prejudice. Consequently, include strategies seek to ensure that the divisions that can naturally form around age and other visible demographic characteristics do not manifest (or are reduced) in daily organizational life. As such, include strategies tend to focus more on the perceptions and actions of other relevant members of the organization (such as members of recruitment panels, leaders or coworkers of a younger age) to ensure that the categorization and identification processes are not organized around age, but around the larger organizational group. Very commonly, include strategies focus on "preventing exclusion" by ensuring compliance with discrimination laws and managing subtle forms of discrimination. However, include strategies can and should also involve efforts to proactively promote inclusion, such as by actively recruiting mature workers, and ensuring a psychologically safe culture in which diverse workers can behave authentically (Holvino, Ferdman, & Merrill-Sands, 2004; Shore, Cleveland, & Sanchez, 2018). Based on optimal distinctiveness theory (Brewer, 1991), inclusive strategies should also ensure diverse members are accepted members of groups (meeting belongingness needs) while at the same time allow them to maintain a differentiated sense of self (meeting uniqueness needs) (Shore et al., 2018).

McDonalds is an example of a company that has introduced inclusive strategies to actively encourage the recruitment of older workers, with benefits for employee satisfaction and customer satisfaction (Faragher, 2016). In Australia, the ANZ bank implemented inclusion strategies, such as changes to advertising to appeal to mature workers and the removal of barriers

to career advancement, resulting in a significant increase in the average retirement age of workers, as well as greater retention of mature workers (Barnett, Spoehr, & Parnis, 2008). More broadly, in a rigorous multi-method study, Boehm, Kunze, and Bruch (2014) found that for a sample of 93 German companies, inclusive HR strategies were associated with a more positive age climate, which in turn predicted company performance and lower mature worker turnover intentions.

"Individualize" Meta-Strategies

"Individualize" pertains to the growing recognition that work often needs to be adjusted to meet the individual and unique needs of an ageing workforce[1]. It is well-recognized that motivational, physical, cognitive, affective, and life demands changes occur in people as they age, and therefore that adjustments to the work to accommodate these changes will benefit individual workers, as well as their teams and organizations. For example, Zaniboni, Truxillo, and Fraccaroli (2013) showed that task variety was more positive for younger workers but skill variety was more positive for older workers, and Wang, Burlacu, Truxillo, James, and Yao (2015) showed significant age differences in reactions to job feedback. At the same time, research has recognized that people do not all change in the same way as they age (e.g., Fisher, Chaffee, Tetrick, Davalos, & Potter, 2017), hence work adjustments also need to cater for individual differences in mature workers.

Theoretically, this perspective is particularly underpinned by life-span development and gerontology theories, such as the Selective Optimization with Compensation Theory (SOC, Baltes & Baltes, 1990), which identifies various within-person changes that require adaptation on

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[1] Although "include" also involves valuing diverse members' uniqueness, the focus is mostly on the social and cultural acceptance of people who are different from oneself. In contrast, "individualize" is a meta-strategy focused on supporting uniqueness through the adjustment of the work itself.

the part of the individual in order to age successfully. Example strategies that help people adapt to physical, cognitive, and lifestyle changes, respectively, include improving the ergonomic aspects of work to reduce biomechanical strain; allocating tasks that rely more heavily on crystallized intelligence rather than fluid intelligence; and allowing flexible work hours so that mature workers can care for grandchildren. Socioemotional selectivity theory (SST, Carstensen, Isaacowitz, & Charles, 1999) also fits within this category, which involves the idea that people's goal selection and pursuit depends on their perception of time. As people age and time is seen as more limited, people prioritize emotion-related goals over knowledge acquisition goals, and overall they tend to focus on positive rather than negative work experiences (Ng & Feldman, 2010). An example strategy that stems from this perspective is providing mentoring opportunities to mature workers so they can help others. In contrast to "include" strategies, which mostly target non-mature workers, individualize strategies tend to target mature workers.

A key implication of this perspective is that to attract and retain mature workers and to ensure their health and effectiveness (or their "successful aging", Zacher, 2015), organizations need to be willing to redesign the work and the work context to accommodate changes in people as they age. Thus, whilst we recognize that "individualize" strategies can include programs to help individuals adapt themselves (such as health promotion strategies that help employees to maintain or improve their health, or training people in SOC approaches, see Truxillo et al., 2015)), we believe it is especially important that organizations also be willing to *change the work* to accommodate individual changes. The work redesign intervention reported by BMW in Germany to redesign manufacturing work (Loch, Sting, Bauer, & Mauermann, 2010) is a classic example of changing the work. In this case, workers participated in redesigning their work and the work environment, making more than 70, often simple, changes to reduce physical strains

(e.g., special chairs at some work stations, magnifying glasses, job rotation), resulting in the productivity of the line increasing by 7% and equalizing that staffed by younger workers. Schemes that enhance people's flexibility over when they work, such as adjustable work hours, telecommuting, or sabbaticals (implemented at SAP North America, Feinsod & Illiano, 2015), also fit this perspective.

Importantly, such examples of organization-led work (or top down) work design change can be complemented by strategies that allow and support individuals to redesign their own work, such as via job crafting (Kooij, Tims, & Kanfer, 2015), i-deals (Bal & Boehm, 2019) or proactive work behavior (Kooij, 2015). Indeed, strategies to support both individual-led (or bottom up) work design change and organization-led (or top down) work design change are likely to be most powerful (Grant & Parker, 2009). For example, individual-led work redesign behaviors such as job crafting will be facilitated in a high autonomy environment (Slemp, Kern, & Vella-Brodrick, 2015) and, at the same time, organization-led work redesign will be more successful if individuals have the motivation and capability to take advantage of the redesign (Parker & Sprigg, 1999).

"Integrate" Meta-Strategies

Because an ageing demographic not only brings an ageing workforce but also an increasingly age *diverse* workforce, there is an increasing need to look at the interaction processes arising from such diversity. Team and compositional approaches to age diversity suggest that, unless actively managed, age diversity in work teams tends to be associated with negative effects on team and organizational outcomes (Wegge & Schmidt, 2009; Williams & O'Reilly, 1998) or has little benefits for performance (Bell, Villado, Lukasik, Belau, & Briggs, 2011; Horwitz & Horwitz, 2007). However, emerging research is showing that organizations can

harness the advantages of age diversity if specific interventions are made to ensure the conditions

that age diverse teams need in order to thrive (Wegge et al., 2012), or when the interventions

foster positive intergenerational learning and knowledge sharing processes (Gerpott, Lehmann-

Willenbrock, & Voelpel, 2017; Harvey, 2012). Thus, organizational strategies need to go beyond

"include" (mostly focused on non-mature workers/stakeholders) and "individualize" (mostly

focused on mature workers) to explicitly improve how members of diverse age groups interact,

share knowledge, and learn from each other. "Integrate" strategies target the inter-relationships

between younger and older workers, and in so doing, aim to achieve more effective teams and

organizations. Strategies that fit within this perspective include, for example, knowledge-sharing

schemes and mentoring/reverse mentoring schemes.

Relevant theories underpinning this meta-strategy include those related to team diversity,

especially the information/decision-making perspectives on team diversity (e.g., Williams &

O'Reilly, 1998; Van Knippenberg et al., 2004). Thus, while the theories underpinning the

"include" meta-strategy tend to conceptualize diversity as separation (i.e. differences among

team members in their attitudes, values, etc.), other conceptualizations of diversity focus on the

information benefits that can arise from variety (Harrison & Klein, 2007). Greater diversity can

mean more information available for decision-making, and a broader pool of resources, which in

turn can foster team performance (Van Knippenberg et al., 2004; van Knippenberg & Schippers,

2006). For example, members of an age diverse work group bring to the table a diverse set of

work experiences, knowledge and training, skills, abilities, and perspectives, which can be

especially relevant when these teams are required to deal with complex tasks, or tasks that

require innovative solutions.

Nevertheless, strategies are needed to ensure this diversity benefits for the team, because age diversity does not automatically translate into information benefits. In their categorization – elaboration model, Van Knippenberg and colleagues (2004) proposed that bias (consistent with the social categorization theory) or information elaboration (consistent with diversity as variety) can occur, depending on various circumstances, with contextual elements facilitating teams switching between these two key processes. Empirical evidence shows that diversity can indeed facilitate social integration, work group performance, and innovation in contexts where diversity is valued (i.e. when group members believe in the value of diversity) (e.g. Homan et al., 2008; Homan, van Knippenberg, Van Kleef, & De Dreu, 2007; Kearney, Gebert, & Voelpel, 2009; Van Dick, Van Knippenberg, Hägele, Guillaume, & Brodbeck, 2008), suggesting the good sense of combining "include" strategies with "integrate" strategies.

Other theories also inform this meta-strategy. For example, social exchange theory (Blau, 1964; Emerson, 1976) proposes that individuals reciprocate attitudes and behaviors such that, if the parties involved in an interaction abide by certain rules of exchange, that relationship will evolve over time into trust, loyalty and commitment. This has implications for "integrate" because in their interactions, younger and older workers can be seen as exchanging resources they each value but might not have. Schemes such as mentoring and reverse mentoring in which younger workers and older workers help each other can foster reciprocal processes and build positive interrelations in a team.

In organizational practice, mentoring interventions (such as the one at Central Baptist Hospital, USA, Roundtree, 2012) have been shown to reduce turnover for the entire workforce and increase satisfaction. More complex interventions centered around networking, mentorship

and cross-training, such as reported at GlaxoSmithKlein, have contributed to improved knowledge sharing and overall perceptions of the company (Feinsod & Illiano, 2015).

Contributions and Future Directions

In this commentary, we have proposed three overarching categories of organizational strategies likely to help to address the challenges of an ageing workforce, with distinct theoretical mechanisms underpinning their positive effects. Whilst others in the diversity literature have also synthesized different perspectives, our approach is unique. For example, Ali and French (2019) differentiated a fairness/discrimination approach in the literature (i.e., "include") from an approach focused on synergy (i.e., "integrate"); and Ely and Thomas (2001) identified three diversity perspectives– two focused on "include" (discrimination/fairness; access/legitimacy), and one on "integrate" (diversity as a resource for learning). We go beyond these schemas to additionally propose "individualize" as a distinct meta-strategy because of the focus on changing work, rather than changing workers via shifting their attitudes or behaviors.

Our framework highlights many strategies that are possible, and likely necessary, for organizations to make better use of the talents of mature workers. The model should thus help to broaden the range of interventions considered by organizations. In a similar vein, our set of meta-strategies might help organizations to move beyond a legal, compliance-oriented focus to more proactive stance focused on attracting, retaining and fostering the success of mature workers. Compliance might serve to achieve (to some extent) inclusion, but is less likely to achieve individualizing or integration. We believe the framework will help to shift the conversation from one focused on coping with the "problem" of mature workers, to one focused on harnessing the benefits of mature workers, with their distinct experiences and knowledge base.

From a research perspective, our framework is based on an assumption that particular types of strategies will have their effects via particular theoretical mechanisms. For example, we consider training leaders to welcome mature workers to be an "include" strategy that has an effect on social categorization processes, whereas work redesign is an "individualize" strategy that has an effect via accommodating mature workers' needs, and cross-training is an "integrate" strategy that should enhance knowledge sharing between mature workers and non-mature workers. These underpinning processes for three categories of strategies have been assumed but not tested. Further, if our assumptions are correct, we propose that - whilst the meta-strategies are each likely to contribute to multiple outcomes - each will be more important for some outcomes than others. Thus, as depicted in Figure 1, include strategies are likely to be especially important for attracting mature workers; individualize strategies for supporting mature workers' health, productivity and successful ageing; and integrate strategies are likely to be most important for team/collective-level outcomes. As such speculations have not been tested, future research is warranted.

Our framework also implies the need for some reorientation. In the literature on mature workers, there is much research on the inclusion processes, some emerging research on individualizing work, and relatively little research on the integrative processes. We call for more research attention to "individualize" and "integrate". There is likewise value in considering how these meta-strategies might work together. It could be that, for organizations to really obtain competitive advantage from a mature workforce, action on all three fronts is required. That is, rather like the notion of "bundles of HRM strategies" (Subramony, 2009), perhaps a balanced configuration of these strategies is what matters most, instead of intensive action on one alone. Indeed, this is implied in the categorization – elaboration model described above, which suggests

that strategies to harness diverse knowledge ("integrate" strategies) only work when inclusiveness is also high (achieved via "include" strategies). Another possibility is that there is a particular sequencing required: perhaps efforts to "individualize" and "integrate" without an initial focus on "include" might be counterproductive? In the words of Ali and French (2019, p.287), "little is known about which age diversity practices and programs are effective, in which type of organizations, and for which outcomes".

More generally, we join others (e.g., Truxillo, et al., 2015) to advocate for more intervention studies. Such studies will not only help to identify causal processes, but will also enable us to address nuanced questions about which interventions work when, which interventions can be easily scaled, and what change processes need to be in place for interventions to bring about actual change.

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Table 1. Summary of the theoretical and practical underpinnings of the proposed meta-strategies.

	Include Meta-Strategy	Individualize Meta-Strategy	Integrate Meta-Strategy
Definition	Organizational strategies to welcome, accept, and fairly treat mature workers	Organizational strategies to accommodate and support the changing individual needs and preferences of mature workers	Organizational strategies to improve how age diverse members interact, share knowledge, and learn from each other
Example types of interventions	Ensuring compliance with anti-discrimination laws

Proactive targeting of mature workers in recruitment and selection processes

Training members of selection panels/ promotion committees to remove bias

Developing an age friendly diversity climate, such as by helping younger workers to appreciate mature workers

Training supervisors to reduce negative age stereotypes | Supporting mature workers' individual adjustment to cognitive, physical, and psychosocial life changes (e.g., career management, health promotion, SOC training)

Changes to the work to support mature workers' adjustment, including ergonomic interventions, flexible working practices & other work-life supportive practices

Development, maintenance, utilization, & accommodative HR practices to aid mature workers discussed by Kooij, Jansen, Dikkers, and de Lange (2014)

Facilitated return to work programs | Increasing positive relations between groups such as via positive intergenerational exposure

Team interventions to improve knowledge sharing

Training for older workers to mentor younger workers

Mentoring and reverse mentoring schemes designed for age diverse members to share their distinct knowledge and experiences |

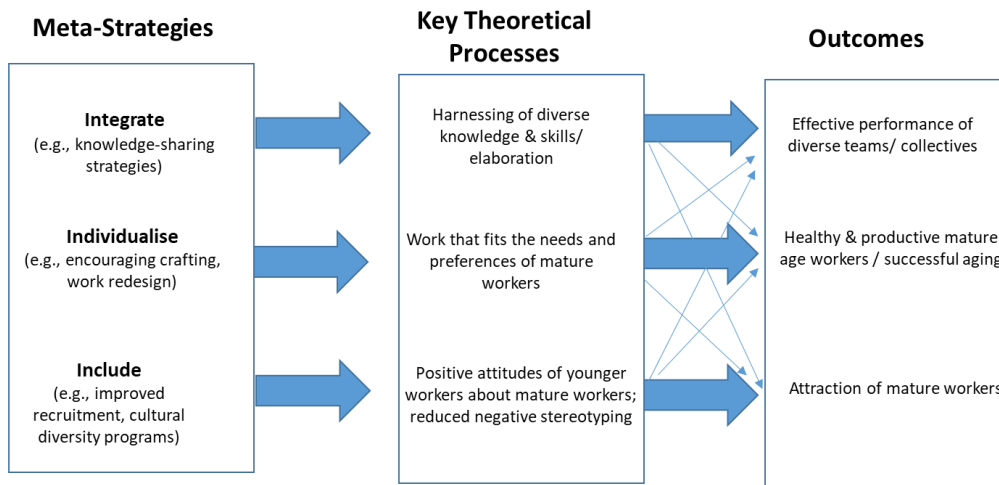| **Relevant theoretical perspectives**	Self-categorization theory (Turner, 1982)	Selective optimization with compensation theory (Baltes & Baltes, 1990)	Information/decision-making perspectives on diversity (van Knippenberg & Schippers, 2006)
	Social identification theory(Tajfel & Turner, 1986)	Socioemotional selectivity theory (Carstensen, et al., 1999)	Social exchange theory (Emerson, 1976)
	Similarity - attraction perspective (Byrne, 1971)	Personality change theories (e.g. Roberts, Walton, & Viechtbauer, 2006)	Contingency theory (Galbraith, 1973)
	Optimal distinctiveness theory (Brewer, 1991)	Motivation change theories (e.g., Kanfer & Ackerman, 2004)	
		Theories of successful ageing (see Zacher, 2015)	
Key outcomes	Increased numbers of mature workers in the workforce	Maintenance & optimization of mature workers' performance via increased person-job fit	Transfer/preservation of key organizational knowledge and expertise
	Positive climates for diversity		Optimal team and organizational performance
	Reduced bias	Extended participation of mature workers in the labor force/ reduced turnover and pre-mature retirement	
	Equal employment opportunities & absence of discrimination		Enhanced innovation

Figure 1. Overview of meta-strategies and their possible effects on outcomes via key processes.