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Ageism: Managing On the Bias©

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Age Lessons, LLC

Abstract

Age discrimination is more than a bad practice--it's simply bad business. Many companies appear unaware or unconvinced that ageism exists, despite evidence to the contrary. Unfortunately, ageism has proven to be one of the most pervasive and insidious forms of prejudice in the workplace as well as one of the most difficult to discern and prove. Age discrimination is also one of the most costly for the bottom line when it comes to litigation, more so than gender or race–based discrimination cases with an average around $219,000 (McCann & Giles, 2002).

This paper explores the following questions:

How omnipresent is ageism in the American workplace?

How does ageism reveal itself?

Are younger and older employees equally affected by ageism?

What changes in benefits packages would address the concerns of workers?

How can ageism persist in a workplace, and world, that is getting older?

What new and innovative approaches can equalize employment practices?

Conclusions are drawn from a series of findings surfaced in the 2007 Age Lessons study "Ageism: Managing On the Bias", a two-part research effort comprising a nationally-projectable online study of 1,066 employed adults fielded through Harris Interactive® and a qualitative component consisting of 71 depth phone interviews conducted by Age Lessons with management-level employees to explore areas of special interest or requiring additional clarification.

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Executive Summary

Ageism not only exists, it exhibits at both ends of the worker age spectrum, affecting the youngest and oldest employee groups most dramatically, and is so embedded in the warp and weave of the fabric of American business, that it is accepted by many as the status quo and virtually ignored.

Unexpectedly, according to the quantitative portion of the Age Lessons study fielded by Harris Interactive®, younger workers ages18-34 [36%], and men [30%] were more likely to acknowledge a personal experience with ageism than older workers age 35+ [24%] and women [23%], a finding counter to expectations but consistent with cultural norms for a more vocal Gen Y age cohort and more assertive, confident male employee base.

Unable to reconcile forces beyond their control [aging, corporate downsizing and American youth culture], it appears that older employees do not self-identify with a protected class [workers 40+] in an attempt to avoid the stigma of ageism. Instead, they assign the ageism experience to others and assume the role of objective observer rather than affected participant.

This displacement phenomenon may account for the disparity between the quantitative survey response levels about having "personally experienced discrimination" [27% of employed adults] and qualitative response levels about having "experienced or *witnessed* discrimination" which yielded a near-unanimous finding [93%]. This piece of emotional artifice enables workers to soldier on in the workplace despite the perception or reality of age bias.

Probing during the qualitative research phase of the two-part Age Lessons study uncovered the fact that respondents either did not want to acknowledge ageist experiences, possibly to avoid being viewed as a victim in a situation where they felt there was no means to achieve redress, or did not tacitly view ageist actions as discriminatory, instead, accepting them as the way things operate in the business world.

Despite a pervasive feeling of limited horizons, rather than the burned-out age cohort derided in the popular press, when asked which listed employee benefits they found appealing, mature workers exhibited

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a thirst for knowledge, evidenced as an interest in professional education, a competitive edge that embraces performance-based compensation like bonuses and a desire to make up for lost time with respect to retirement savings. Additional findings that generalized across age bands include:

- ***Work/life balance issues proliferate.*** The most frequently mentioned type of age discrimination was the pressure to be "married to the job", reported twice as often by 18-34 year old workers as 45-54 year olds and 50% more often than workers 55+. This represents a potential generational flashpoint as work styles conflict and resentment builds up over perceived inequities and on-the-job contributions. Other possible contributors to work/life imbalance include globalization and
attendant time zone issues and job security concerns, where promotions are based on proxy measures such as hours worked. [Q. 5.4]

- ***Time is money and money motivates.*** Across the age continuum, monetary bonuses were the most appealing benefit listed, the choice of 56% of employed adults. Younger employees age 18-34 proved slightly more interested in flexible work schedules as a benefit [62%] than cash incentives [58%]. [Q. 10.17]

- ***On the job/Off the Clock.*** Malleable work structures proved attractive to every age sector, whether in the form of flexible hours [53%], the ability to earn extra days/time off [39%] or the chance to convert vacation time to personal time [10%]. [Q. 10.01, 10.06, 10.07

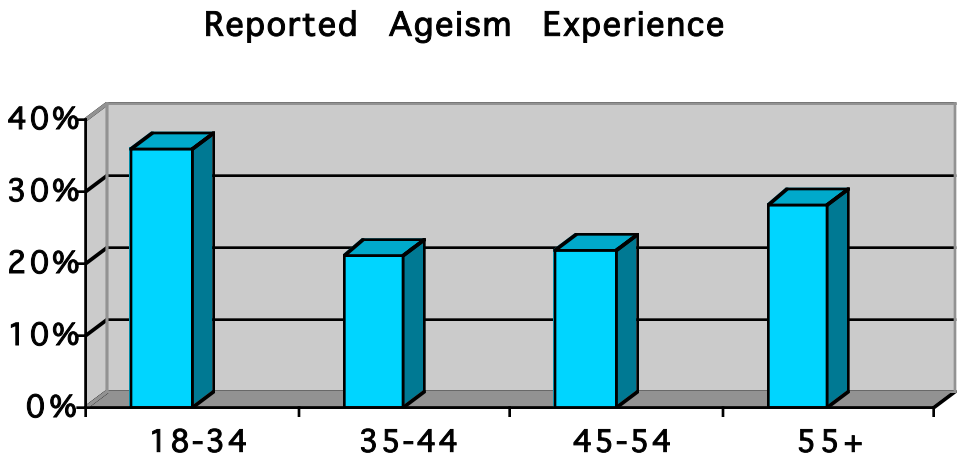
- ***Yearn to learn.*** Education earned double-digit level votes from all respondents, [17% for continuing professional education, 16% for general education tuition assistance] although older workers [55+] favored continuing professional education 2:1 over general education tuition assistance. [Q.10.12, 10.13]

- ***Mentor meltdown.*** Mentoring situations, frequently touted as a solution for institutional knowledge transfer, appealed to fewer than 5% of respondents when positioned as a potential employee benefit. In interviews, mature workers stated that mentoring programs felt liked the company was "picking their brain" in an attempt to glean every bit of information prior to termination. [Q. 10.20]

- ***Dependent dilemma.*** Expanded family responsibilities associated with longer-lived elders and extended-dependency youth are beginning to surface, as shown by the interest in long term care insurance [22%] and health coverage for seniors and adult children [20%] [Q. 10.16, 10.19]

Across the Ages

Somewhat surprisingly, the quantitative research component showed younger workers (18-34) more likely to report having had an ageist experience [36%] than their older 55+ counterparts [28%], despite the longer working lifespan and associated opportunities for negative experiences of mature workers.



Source: Age Lessons/Harris Interactive, "Ageism: Managing On the Bias" Study, n=1,066

This result may be attributable to a number of factors:

- the combined impact of recency, vocality and veracity of ageist statements or actions;
- the response of neophyte employees to a work culture much different than the egalitarian, peer-based social structure of schools;
- the more communicative and outspoken style of Gen Y employees accustomed to the give-and-take dialogue of social networking;
- a visceral reaction to a more objective performance standard than that encountered in a supportive family unit;
- or a tendency among older workers to overlook or be inured to a situation viewed as the status quo.

Also unexpectedly, a higher percentage of men [30%] than women [23%] acknowledged a personal experience with age discrimination in any form. This relative male-dominant finding held across the 12 variables examined with two exceptions: the general impression of women that their input was discounted or ignored on the basis of age; and the feeling of being excluded from informal social networks.

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Marital status was another demographic variable applied during the analysis, and it showed that single/never married respondents [37%] were twice as likely as the divorced/separated/widowed segment [18%] to recognize an ageist experience. Regional distributions showed either a higher incidence of or tendency to report ageism among workers in the South [34%] and the lowest reported rate in the Midwest [22%].

Married to the Job

One in ten workers (10%) expressed the feeling that there was peer pressure to work beyond the defined normal business hours. Even members of the age band most frequently credited with engendering the so-called "workaholic" culture--Baby Boomers--agreed with the statement that "other employees seem married to the job and pressure me to be as well", although by a smaller percentage than younger workers.

Inequitable Incentives

Workers age 55+ complained that "incentives seem mostly geared towards people in a different age group" [13%] at more than four times the rate of employees in the 35-44 age band, more than twice the rate of employees in the 45-54 segment and slightly less than 50% more than workers age 18-34. Consistent with the overall ratings on age bias, employees who sit at the extremes of the age continuum are most likely to report feelings of exclusion or unfair treatment with respect to cafeteria benefit plan offerings.

Sticks and Stones

Employees in the youngest age band [18-34] objected to the fact that people made remarks about their lifestyles and priorities simply on the basis of age [12%] at more than twice the rate of the 35-44 and 55+ age segments and at six times the rate of workers age 45-54. When explored in the qualitative interviews, it became clear that personal style in terms of clothing choice, hair style, body art such as tattoos and piercings, make-up and accessories were substitute signals or indicators for age. It is difficult to separate out the effects of chronological age from visual cues that are closely, but not exclusively, associated with age such as attire.

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Getting Ahead

Age was not perceived to be a barrier on the promotional front for employees in the 35-44 age stratum [only 1% saw it as an issue] and of little concern [4%] to workers age 45-54. However, almost one in ten of older [55+] and younger [18-34] employees felt that they were “not considered for promotion because of my age”. This result is consistent with other findings of higher perceived incidence of age bias occurring at the upper and lower age limits for employees.

Speaking Up

As one might expect, the youngest employee group [under 35] was the most likely to feel that their input was discounted or overlooked by fellow workers, exclusively because of age [10%]. They were three times as likely as other age bands to assert that “my input is discounted or ignored because of my age”. Getting their opinions heard was a virtual non-issue among the 45-54 age cohort. Since experience is an age or tenure-based attribute, it stands to reason that employees new to the work environment would be less obvious sources of advice and counsel. While recent graduates have a valuable contribution to make to the organization, it is likely to be confined to a more narrow discipline or area of study and of a tactical versus strategic nature.

Time vs. Money

Time and money proved to be the most desirable and prized variables from the array of possible benefits presented for consideration. The lines of demarcation were drawn based on age, with the two younger age bands [under age 45] rating flexible work schedules [59%] above a monetary bonus [57%], while mature workers [45+] preferred money [54%] to the still-highly-ranked flextime [43%]. Across all age bands studied, two of the top three preferred benefits were time-based: flexible work schedules [53%] and the ability to earn extra days or extra time off [39%].

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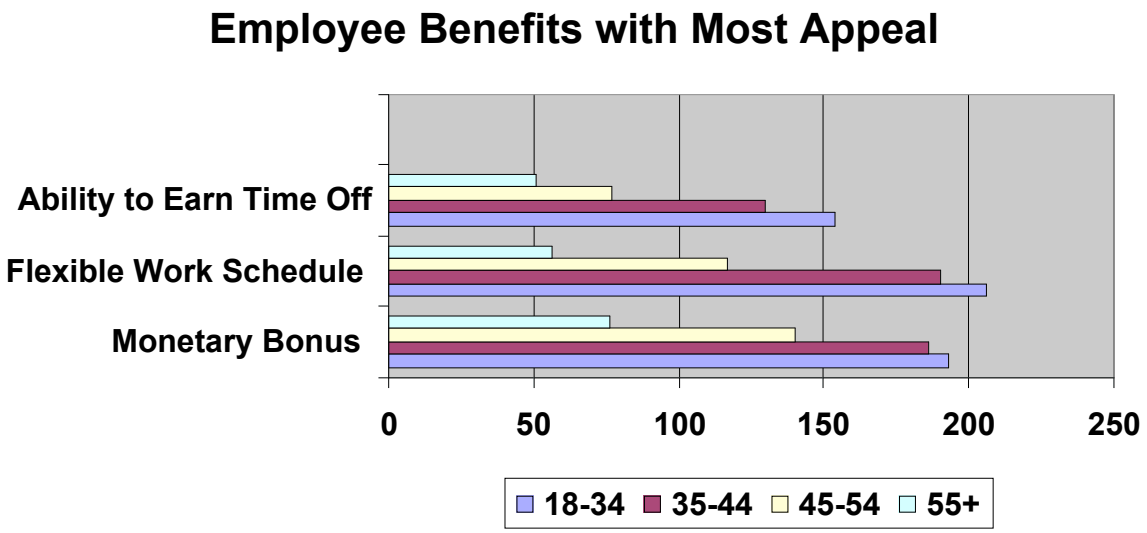

Source: Age Lessons/Harris Interactive, "Ageism: Managing On the Bias" Study, n=1,066

"Flexible work schedules" was selected as a top benefit by 60% more workers age 18-34 [62%] as workers age 55+ [38%], which might be ascribed to the fact that more mature workers have become acclimated to a conventional work environment with established hours. "Ability to earn extra days/extra time off" proved to be a popular choice [46%] among workers age 18-34, as well as workers age 35+ who rated this benefit among their top three picks at 35%.

The preference for flexible work options is validated externally both by real-world anecdotal evidence and other quantitative studies. In a 2004 IBM work/life survey, the highest employee satisfaction scores were reported by home-based employees versus those working in a traditional office setting, and flexible work options were the number one reason a majority cited for staying with the company.[i]

These results were corroborated by the 2005 Spherion Emerging Workforce Study[ii] which identified the top drivers of employee retention according to the U.S. workforce and employers. Consistent with the findings of the Age Lessons study, "financial compensation" and "time and flexibility" were ranked as the number one and number four most desirable factors by employees.

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2005 Spherion Emerging Workforce® Study	
Top Drivers of Retention	
Traditional Employers	**U.S. Workforce**
1. Management climate	1. Financial compensation
2. Supervisor relationship	2. Benefits
3. Growth & earnings potential	3. Growth & earnings potential
4. Benefits	4. Time & flexibility
5. Time & flexibility	5. Management climate

The Long View

Perhaps predictably, employee interest in long term care insurance as an attractive benefit increased with age. While only 15% of workers age18-34 selected long term care insurance as one of the three most desirable benefits, more than twice that percentage of 55+ employees [34%] rated it as a top selection. The largest gap in interest for this benefit was observed between workers in the 35-44 [18%] and 45-54 age brackets [28%], which would follow standard demographic trends.

In a separate qualitative study conducted by Age Lessons among Baby Boomer women responsible for relative eldercare, respondents noted that, as the financial and physical condition of their elderly parent started to decline, the caregiver gained heightened awareness of the need to secure their own future via instruments such as long term care insurance policies. This qualitative observation supports the findings of the quantitative ageism survey.

Healthy Options

About one quarter of mid-range employees [ages 35-44 (23%) and 44-55 (25%)] selected health insurance coverage for a parent or adult child as an attractive benefit. This offering would provide bridge-style protection to children 18+ who are out of work or unable to secure employment with insurance benefits, and older adults too young to qualify for Medicare and unable to afford or qualify for supplement policies.

Back to School

A positive relationship exists between age and the desire for continuing professional education--and this "yearn to learn" increases through time. One in five mature workers in the 55+ age segment, and nearly that percentage of workers between ages 35-54 [18%], ranked the ongoing education benefit highly. In fact, the oldest contingent of workers, 55+ employees, even preferred the continuing professional education benefit [20%] over health insurance coverage for a parent or adult child [16%]. Good news for employers, as professional education benefits the company directly, versus general education which primarily benefits the employee.

By way of contrast, the overall working adult population rated health insurance coverage for a parent or adult child [20%] higher than the continuing professional education benefit [17%]. General education tuition assistance was a more preferred benefit for the 45-54 [20%] and 18-34 [18%] age groups than continuing professional education for these same groups.

Catching Up

The trend line for the proposed "catch-up contributions to retirement savings" benefit is clear: the closer retirement looms, the older and more tenured the employee, the more concerned they become with retirement savings. Employees in the oldest [55+] age group were twice as likely [20%] to select this benefit as those in the youngest group [18-34], with mid-age range employees [35-54] aligning more closely with the older sector. It is possible that recent stock market swings affecting savings levels, and alarmist articles in the "have you saved enough" vein may have inflated the response, but fully one in five mature workers favored the chance to catch-up on retirement savings.

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Pumping Up

Recent wellness initiatives suggested by insurers favor in-house workout facilities or subsidized arrangements with local health clubs as a means of keeping employees healthy and productive while reducing insurance costs. On the whole, a health club subsidy [12%] proved less desirable to employees of all ages than many other proposed benefits.

Lack of Interest or Understanding

The array of potential benefits presented in the study included a number of the more innovative, lesser known, perhaps less understood employee benefit concepts being considered by companies today. They include: financial planning help, subsidized legal services, mentoring opportunities, assistive device coverage, concierge services, in-home elder care assistance, referral services for health needs, an adult day care subsidy, a 24/7 health care helpline and a 24/7 elder care helpline.

Interview results from the prior Age Lessons “daughter trap” research may shed some light on the low ratings for several of the elder care benefits. During the early years of child care for working women, the lack of organized, institutionalized support systems prompted self-reliant parents to create their own patchwork quilt of child care arrangements.

Under this scenario, flexible hours that accommodated pick-up, drop-off and emergency response when needed, and monetary bonuses that defrayed the cost of care, proved more appealing than the chance to opt-in to an unknown or unavailable system. When it comes to elder care, the same approach now applies, according to interviewed caregivers. This may account for the high rankings for money and flexible structure and the low rankings for unfamiliar benefits such as elder care hot lines.

Perception vs. Reality

Age Lessons commissioned an online survey of 1,066 employed U.S. adults fielded through Harris Interactive and determined that 27% of working American adults had personally experienced some form of age discrimination at work as listed in the questionnaire. Additionally, qualitative research in the form of depth telephone interviews was conducted with 71 employees at major U.S. companies to delve more deeply into unexpected findings and explore the underlying factors.

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These investigatory interviews surfaced the fact that many people viewed discriminatory actions as the normal state of affairs, rather than overtly prejudiced behaviors, and simply didn't think to report them as such. Much like African-Americans in the 1950s or working women in the 1960s, inherently unfair practices were tolerated because they were viewed as immutable.

Interviewers discovered that 93% of the qualitative respondent pool admitted to having either "personally experienced or observed" ageism in the workplace, a number almost 250% higher than that reported in the quantitative study. The incidence for this finding is likely overstated in comparison to the quantitative questionnaire due to the inclusion of the word "observed" in the phone interview facilitator guide.

Discussion

A number of sociologists and media observers believe that ageism will be the principal "ism" of the 21st century, a societal blight equivalent to racism and sexism in the 20th century. Unlike race or gender however, age is a remarkable characteristic because it mutates continuously, changing as the individual moves along the maturity continuum.

In theory, this unique aspect of age should make ageism a simple issue to address. By the time people reach adulthood, most everyone has experienced ageism first hand, having been considered too young or too old for some life situation.

It is a painful and frustrating experience to be blocked from an activity for a reason outside of one's control [age], based purely on the perception by another of what is age-appropriate. Having personally experienced age bias, it is posited that people would develop a level of empathy around the subject and avoid visiting ageism on others. This proves not to be the case.

Further, the incidence rate of ageism at work suggests that little ability exists to generalize from ageist experiences which occur in the social venue to those which occur in the work setting. One would think that key learnings acquired viscerally from personal experiences of age-linked discrimination would prevent victims from re-creating the event in a business context. Yet it happens every work day across America; the only question is at what level. Empirical evidence of ageism ranges from a low of 17% reported in a 2005 Gallup Organization poll[iii] to a high of 80% in a 2001 Duke University study published in *The Gerontologist* journal [Vol. 41, No.5][iv].

Unfortunately for employers, the advent of ageism comes at a time when business can least afford to alienate valuable human resources. According to the U.S. Department of Labor Bureau of Labor Statistics, some 20% of the workforce will be over the age of 54 by 2012. The 55-64 year old employee segment is growing twice as fast as workers in the 45-54 age band and five times more rapidly than younger workers age 35-44.[v]

Selective Shortage

Projections of a worker shortage range from a high of more than three million by 2010 to a stable labor market with pockets of disequilibrium occurring on an industry- and job-specific basis.[vi] Particular industry sectors such as utilities, healthcare, engineering, mining, aerospace and defense are especially vulnerable to the combined impact of fewer new entrants to the labor pool and exiting older workers with specialized expertise. Whether projected shortfalls are realized or not, companies are already feeling the squeeze as they compete for people and face the challenges of motivating and managing a multi-generational workforce with disparate value systems and skill sets.

An Expensive Myth

Smart businesses will hang on to older employees for economic reasons: they represent a good value on virtually every objective measure. A recent Towers Perrin study rationalized the cost differential between older and younger employees, dispelling the myth that old is code for more expensive. Under different scenarios, turnover costs associated with hiring a new, replacement employee ranged anywhere from 29% to 39% depending on title and industry, while the total incremental higher cost of workers age 50+ was negligible, somewhere in the <1-3% range.[vii]

Other myths have been de-bunked by recent research as well. The Society for Human Resource Management [SHRM] identified the top three perceived negatives associated with older workers: outdated technology skills, overall expense, less flexible.[viii] The Towers Perrin cost

study detailed above contradicts the erroneous point of view held by many human resource professionals that older workers are more expensive. The Age Lessons is silent on the issue of technology, but demonstrates clearly that flexibility is one of the most sought after benefits for mature employees.

Valuable Assets

Multiple studies of worker competency have determined that older workers are more productive than younger employees, especially in white collar jobs. In its "*Work Opportunities for Older Americans*" monograph series, the Center for Retirement Research at Boston College found no measurable decline in cognitive ability related to factors such as "accumulated knowledge, verbal meaning and word skills". Research also discovered that mature workers were "more efficient at work processes" and demonstrated superior "knowledge of procedures and ability to interact with customers".[ix]

One benchmarking study conducted in 2001 assessed the comparative performance of employees at two similar companies whose primary difference was workforce age. Company A, exclusively staffed with employees age 50+ outdelivered on key metrics, reporting 18% higher profits, 16% less turnover, 40% less absenteeism and 60% lower inventory shortages than Company B with the younger work force.[x]

Deeper Impact

Besides affecting the level of engagement at work, ageism may have a wider-reaching impact, significantly decreasing longevity and self-esteem. Yale University assistant professor Becca Levy conducted a longitudinal study of 660 people age 50 and older and learned that mature adults with a more positive outlook on aging lived an average of 7.5 years longer.[xi] Her studies also uncovered the fact that children as young as age four have been exposed to age stereotypes which are continuously reinforced through their life.

Levy, Ashman and Dior determined that negative stereotyping on the basis of age reduced self-efficacy, lowered performance and heightened cardiovascular stress among older workers.[xii]

These observed effects are not the exclusive purview of the United States. A 2003 study sponsored by Maturity Works in the United Kingdom found that 78% of respondents had experienced ageism and said the effects of age bias have stayed with them; 91% said ageism affected their personal wealth; 71% said it

has negatively impacted their mental health; 62% said it affected their social life; and 31% said it changed their marriage.[xiii]

According to a Duke University study, ageism at work surfaces most frequently as an inappropriate joke at the expense of older people [58%], followed by being ignored or not taken seriously [31%].[xiv] While not a direct violation of the letter of the law per the Age Discrimination in Employment Act of 1967 [ADEA], these actions certainly violate its spirit. Perhaps they don't constitute a hostile work environment, but they certainly create a de-motivating one.

Conclusion

Companies interested in a more productive, stable and competitive workforce would be well-served to re-direct human resource monies to retention, training and alternative work strategies that target a proven entity: older workers. In the process of pursuing a stronger bottom line, business has the opportunity to build a stronger society by initiating a sea change in attitudes and actions toward older people. A few of the tangible benefits are improvements in profits, customer relations, overhead and productivity. An ancillary benefit: motivating older employees also motivates younger employees who observe the company "doing right" by co-workers.

Mature workers are ready, willing and able to work. Contrary to popular belief and management convention, older employees have proved themselves to be a valuable, albeit undervalued, asset. The empirical evidence shows mature workers to be hungry for new opportunities, especially functional training that will enhance their worth to the corporation.

Lifestage-related responsibilities such as college tuitions, elder care and retirement planning ordinate their benefit preferences which differ in several regards from younger counterparts. Most notably, mature workers prefer monetary rewards that can be diverted by the employee to bolster savings or defray dependent expenses.

Younger employees exhibit a higher-than-expected level of disenchantment with certain aspects of corporate culture, particularly ageist attitudes. In addition to negative

experiences around the “too young” bias, younger employees frequently mentioned during depth interviews that they were very aware of the company attitude toward older workers who were “kicked to the curb” in what was termed an “up and out” strategy.

Mentor Fear

Contrary to popular belief, mentoring is not viewed kindly by older workers or perceived to be an appealing, engaging option. Rather, it is viewed as a one-way ticket to obsolescence, benefitting only the company. Older workers describe mentoring as a structured, forced knowledge transfer designed to leach essential information from the seasoned worker and impart it to an individual considered to be their replacement. Naturally, there is little incentive for mature employees to foreshorten their worklife by cooperating with these ventures unless it is paired with some offsetting benefit or skill-expanding opportunity. The only way for companies to offset this passive aggressive resistance is to demonstrate good faith through practice and corporate culture over time. As with interpersonal relationships, trust must be earned.

Two in the Box

One approach that has worked successfully for Cisco, Dell, Goldman Sachs and Intel is the “two in a box” system. Partners with equal, but different strengths, share an expanded-scope job, affording each the opportunity to stretch and learn in a collaborative setting.[xv] Typically, these bi-furcated jobs encompass multiple, complex, complementary, and often mutually exclusive, aptitudes such as highly technical financial trading expertise or the mathematical proficiency to structure exotic financial instruments along with superb negotiating technique and the people skills of an accomplished account relationship manager.

The co-managers horse trade responsibilities continuously to maintain a balance of activities, and upgrade their skills through proximity and parley. This structure affords the kind of dynamic, fluid environment that would challenge neophytes and veterans alike in direct response to the interest expressed through this survey in more flexible work patterns. Two in the box also is more challenging to measure and manage in conventional ways, although it represents a near-perfect foil for 360 degree evaluation methodologies, because direct reports and team members always have an accurate perception about the division of work.

Under this “best of the best” approach, both parties have a financial incentive to cooperate and collaborate since a significant portion of compensation will be linked to the shared deliverables and outcomes. It’s an

optimal methodology for effective skills transfer since learning occurs in the most natural and context-appropriate manner--on the job.

Corporate Currency™ and Job Auctions

Age Lessons believes there exists an even more inventive, free market solution that will 1] keep employees of all ages and aptitudes involved, 2] gauge employee interest in the posted job, 3] force a rank order between career advancement and benefit options, and 4] generate a market value for the position, all while 5] removing the opportunity for personal bias in the hiring decision. That solution? Job auctions.

Borrowing a page from game theory, job auctions would operate on a “sealed bid, first price” basis, where the highest bidder wins. Instituting a reserve or minimum bid would establish a floor that serves as a pre-screening mechanism so only qualified candidates [those with the minimum number of points] can enter the bidding.

Human resource points can be used not just to bid on a job, but for trade-in on other valuable benefits such as personal time off, summer hours, professional education, upgraded technology [e.g. PDAs, iPhones] and similar options, functioning like a form of in-house or corporate currency. The number of points available to each person would be undisclosed to other bidders and individual bid values would remain sealed.

Each employee would be assigned points annually based on performance ratings, aptitudes, technical skills, academic and professional credentials, and would bid as many points as they thought it would take to win a specific job and still enjoy the privilege of being able to purchase some subset of desirable benefits. Workers would allocate points between a new job and preferred benefits in a manner that maximizes personal utility, assuming that players act rationally and strive for an optimal solution.

Candidates would assign a bid point value based on the personal utility of the job, which could include expanding skills for future career advancement, high profile exposure to senior executives, intellectual challenge, opportunities for internal networking, access to information/technology/ people, ability to care for an elder relative, more time to coach or pursue a hobby, etc.

The bidding process itself, whether for a job or benefits, would prove highly revealing to management because employees will disclose their true priorities in the way they assign utility using points as proxy. It

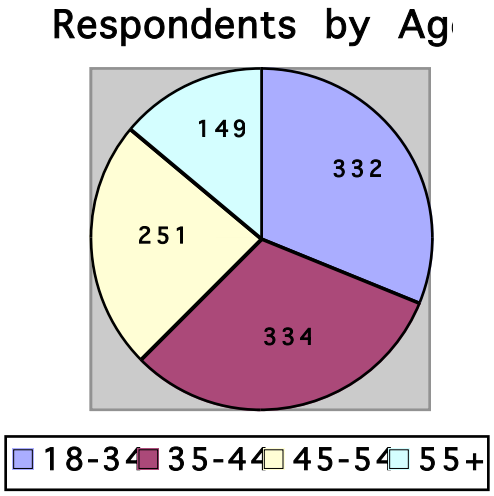
would be informative to learn when, how and why employees distribute available points across various work-life alternatives. Bids will serve as an accurate barometer on the perceived value of different benefits to different employee groups and should surface tipping points based on demographic, lifestage and other analyses that suggest logical pairings of individuals for two in the box jobs as well as highly desirable benefit clusters.

Age Lessons is looking for companies interested in participating as Beta sites for a job auction and corporate currency trial. For details about the test, contact Laurel Kennedy at Age Lessons, 773.252.0123 or lkennedy@agelessons.com

Methodology

The quantitative component of the ageism study was fielded February 20-22, 2007 by Harris Interactive on behalf of Age Lessons as part of an online omnibus survey and comprised two multi-part questions: one to identify which of 12 possible types of ageism had been personally experienced, if any; and one to rate a list of 20 possible employee benefits to determine if age-based preferences exist.

A total of 1,066 employed U.S. adults participated in the survey and 286 or 27% of the sample answered the ageism screening question positively. Figures for age, sex, race/ethnicity, education, region and household income have been weighted where necessary to reflect the incidence rates in the general population and to adjust for respondent propensity to be online.



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The qualitative component of the ageism study was fielded by Age Lessons consultants in March 2007 and comprised lengthy depth interviews with 71 management personnel of differing ages and genders at major U.S. corporations representing a diverse cross-section of global industries.

With a pure probability sample of 1,066, one could say with a ninety-five percent probability that the overall results would have a sampling error of +/- 5 percentage points. Sampling error for data based on sub-samples would be higher and would vary However, that does not take other sources of error into account. This online survey is not based on a probability sample.

Research Sponsor

Age Lessons is a "thinking firm", part think tank and part consulting firm, that converts knowledge of the Baby Boomer cohort into business opportunities and policy recommendations for private and public sector clients. The company provides a barometer on Boomer needs, wants and values in five life areas: 1] finance/money, 2] wellness/body, 3] values/spirit, 4] career/work, and 5] social/play.

Age Lessons is a founder member of the International Mature Marketing Network [IMMN], the first and only global association to champion 40+ marketing. IMMN is a non-profit consortium of marketers, advertisers, agency execs, manufacturers, publicists, media, academics and researchers focused on the 40+ consumer, a market of growing size and influence around the world.

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[i] "Clocking Out," *HR Magazine*, Society for Human Resource Management, June 2007. www.shrm.org/hrmagazine/articles/0607/0607cover.asp

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