



Managing an Intergenerational Workforce:

Strategies for Health Care Transformation

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Accelerating Performance Improvement


American Hospital Association

American Hospital Association 2013 Committee on Performance Improvement

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Executive Summary

Generational diversity is rapidly changing workforce dynamics. Each generation has different priorities, attitudes, communication styles, work approaches and ways to interact with colleagues, which influence organizational culture and performance. There are also common and unifying characteristics across all generations that can be leveraged to create optimal teams, critical for future health care models.

Leveraging these generational strengths and differences will give hospital and care system leaders an edge as the health care field moves from the “first curve,” where hospitals operate in a volume-based environment, to the “second curve,” a value-based care system and business model. Leaders that develop robust and productive multigenerational teams, leveraging each cohort’s strengths, will be well positioned to handle “life in the gap,” the transition between the two curves.

In 2011, the American Hospital Association Committee on Performance Improvement (CPI) released *Hospitals and Care Systems of the Future*, identifying several must-do strategies and core competencies to help leaders manage life in the gap and achieve the Triple Aim of health care: improve the health of the population (our communities), improve the individual care experience and reduce the per capita cost of health care. Building a robust organizational culture that can adapt to change is essential to achieve these goals. To build a healthy culture, leaders need to harness all employees’ potential to achieve optimal organizational performance and ensure excellent patient care.

With the workforce becoming increasingly diverse, the 2013 AHA CPI explored the effects of the intergenerational workforce on hospital organizational culture and patient outcomes. Leaders who capitalize on the commonalities and differences of each cohort can create a dynamic and engaged workforce and gain a competitive edge in attracting and retaining productive employees, even with labor shortages.

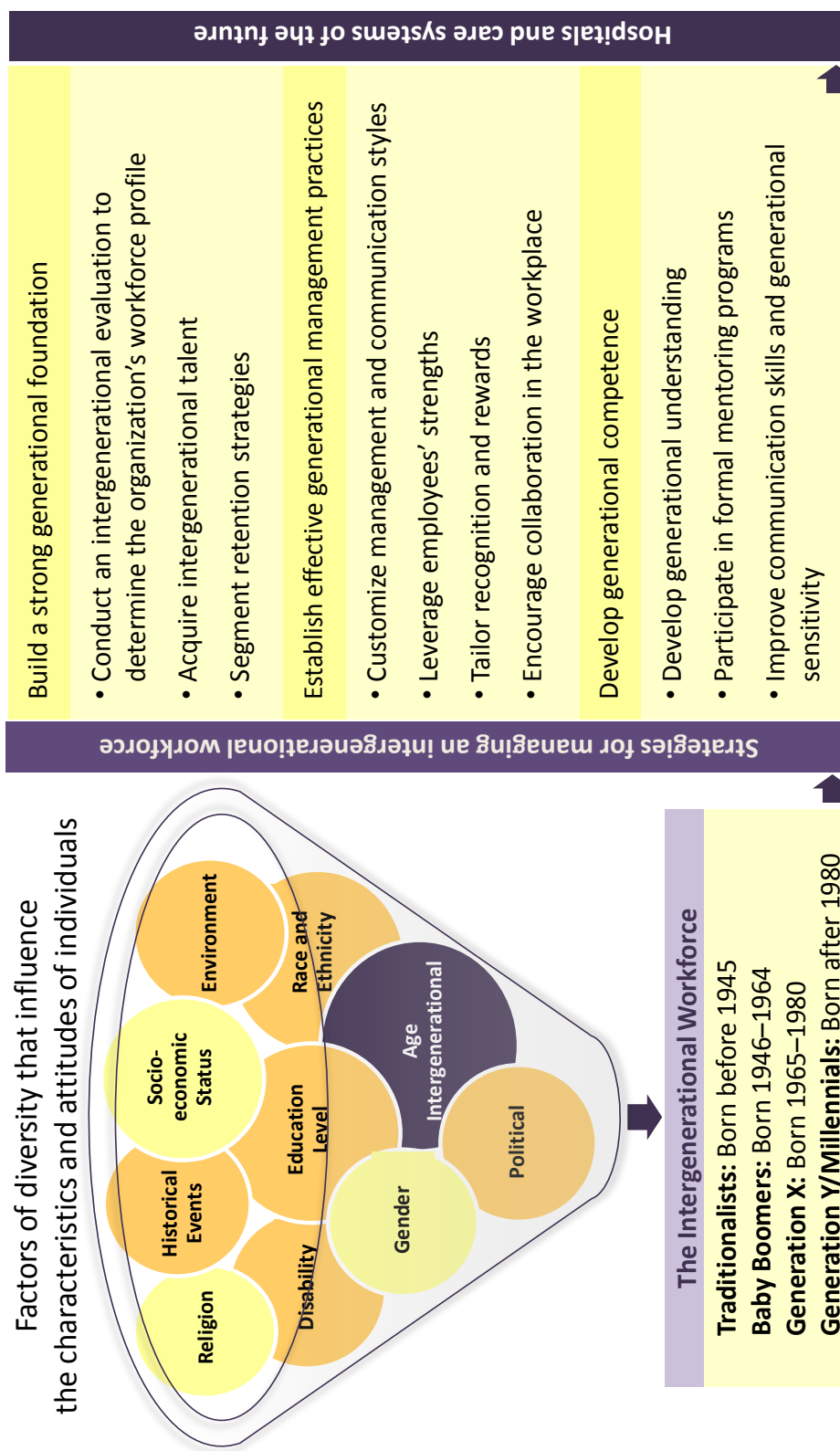
Each generation brings a different set of values, beliefs and expectations to the workplace, from the traditionalists (born before 1945), baby boomers (born 1946 to 1964), Generation X (born 1965 to 1980) to the millennials (born after 1980). Leaders need to develop strategies to engage these different groups simultaneously to achieve optimal clinical outcomes and patient experience. In contrast, organizations that fail to effectively manage a generationally diverse workforce will experience high employee turnover; pay higher costs for recruitment, training and retention; and have lower patient experience scores and worse clinical outcomes.

The figure “Strategies for Managing an Intergenerational Workforce” presents factors that influence how individuals approach work and provides strategies for hospital leaders to implement. Hospitals leaders that leverage the strategies can create high-performing teams adaptable to evolving health care needs. Of the recommended strategies, it is essential that every organization start with:

- conducting an intergenerational evaluation to determine the organization’s workforce profile and develop a comprehensive plan;
- implementing targeted recruitment, segmented retention and succession planning strategies; and
- developing tailored communication strategies that cultivate generational understanding and sensitivity.

As workforce demographics shift, jobs, scope of practice, team roles and professional education in the health care field will trump current care delivery structures and necessitate innovation. Hospitals and care systems that implement intergenerational strategies and practices—critical to redesigning care delivery—will achieve second-curve outcomes. Success will elude those organizations that fail to do so.

Figure: Strategies for Managing an Intergenerational Workforce



Source: AHA CPI, 2014.

Introduction

By the next decade, the U.S. health care industry will face workforce shortages due to aging employees and to more patients living longer as a result of new treatments and technology. There will be a generational gap between older patients and younger health care providers that will impact the level and quality of care. Several efforts are in place to address labor shortages, such as the expansion of allied health professional careers, emerging health care occupations and expansion and acceleration of clinical education programs.

Expansion of allied health professional careers

In the last two decades, health care delivery in the United States transformed from a segmented care model into a multidisciplinary model. This development, along with managed care, the aging population and increased need for rehabilitation services, resulted in an expansion of allied health professional careers.¹

Emerging health care occupations

Health care reform and the movement toward patient-centered care will increase employment opportunities in newer health care occupations such as community health workers, chronic illness coaches, patient advocates and home- and community-based service navigators.² These new members of the health care team improve patient health and support independent living, with a focus on emphasizing prevention and avoiding unnecessary hospitalization, thereby lowering costs and increasing health care access for more individuals.³

Expansion and acceleration of clinical education programs

In recent years, universities have increased capacities in medical and nursing schools by expanding their size and creating accelerated programs for some clinical professions.⁴

Why the Intergenerational Workforce?

For the first time in modern U.S. history, there will be four generations in the workforce. This report explores the characteristics of each generation and their impact on the health care industry. The generations are defined as follows:

- Traditionalists (born before 1945)
- Baby boomers (born 1946–1964)
- Generation X (born 1965–1980)
- Generation Y/Millennials (born after 1980)

Individuals from different generations may bring vastly different sets of values, beliefs and expectations to the workplace. They have different priorities, attitudes, communication styles and ways to engage with peers and work design that is influencing organizational culture and performance. Ignoring these differences can be detrimental for any organization. However, leaders who capitalize on these inherent differences can create a dynamic and engaged workforce needed to achieve health care's Triple Aim: improve the health of the population (our communities), improve the individual care experience and reduce or control the per capita cost of health care. Capitalizing on these differences will also give health care leaders a competitive edge in attracting and retaining productive employees, even with labor shortages. In addition, some individuals born on the cusps of generations—"cuspers"—understand and resonate with both groups. Organization may want to build strong relationships with cuspers and leverage their abilities to bridge generational commonalities and differences in areas such as communication styles and reward and recognition preferences.

Preparing Hospitals and Care Systems for the Future

The 2011 AHA Committee on Performance Improvement report, *Hospitals and Care Systems of the Future*, identified must-do strategies and core organizational competencies to help leaders achieve the Triple Aim of health care. Two must-do strategies and four core organizational competencies support building a strong organizational culture, essential to developing the future workforce.

The must-do strategies are:

1. **Align hospitals, physicians and other providers across the continuum of care**
2. Utilize evidenced-based practices to improve quality and patient safety
3. Improve efficiency through productivity and financial management
4. Develop integrated information systems
5. Join and grow integrated provider networks and care systems
6. **Educate and engage employees and physicians to create leaders**
7. Strengthen finances to facilitate reinvestment and innovation
8. Partner with payers
9. Advance an organization through scenario-based strategic, financial and operational planning
10. Seek population health improvement through pursuit of the Triple Aim

The core organizational competencies are:

1. **Design and implement patient-centered, integrated care**
2. **Create accountable governance and leadership**
3. Plan strategically in an unstable environment
4. **Promote internal and external collaboration**
5. Ensure financial stewardship and enterprise risk management
6. **Engage employees' full potential**
7. Collect and utilize electronic data for performance improvement

This report identifies approaches and initiatives to help health care leaders deploy the boldfaced strategies and competencies. Hospital leaders must focus on developing organizational culture, particularly managing the intergenerational workforce, to find success in the second-curve, value-based environment.

Figure 1 illustrates intergenerational management strategies that will ultimately lead hospitals and care systems to achieve second-curve outcomes.

Figure 1: Managing an Intergenerational Workforce to Achieve Second-Curve Outcomes



Source: AHA CPI, 2014.

Multiple Generations in the Workplace

Generational Demographics

As people in the United States are living and working longer, the workforce composition has shifted and will continue to become more generationally diverse (see Figures 2 and 3).

Figure 2: U.S. Population by Generation

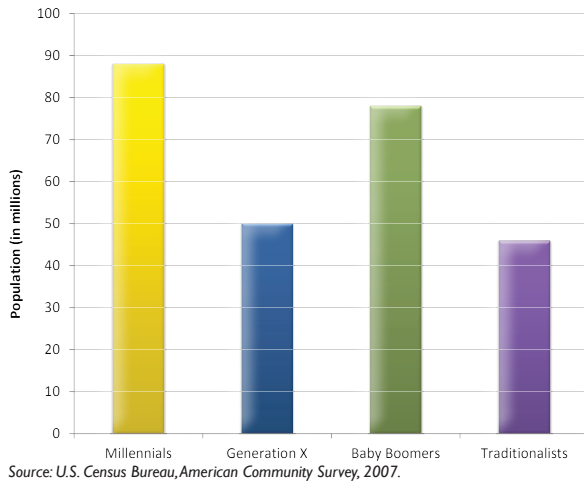
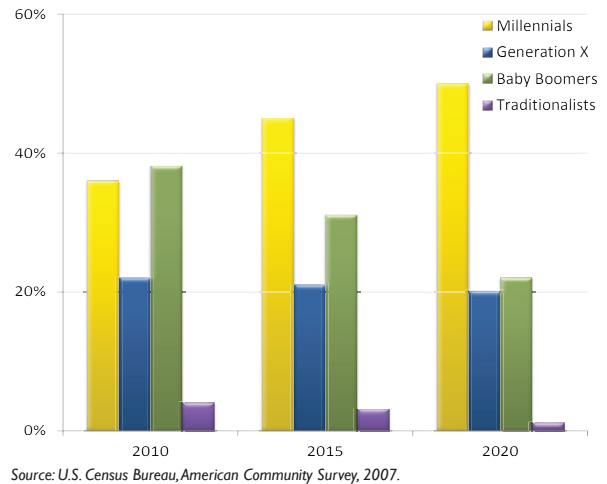


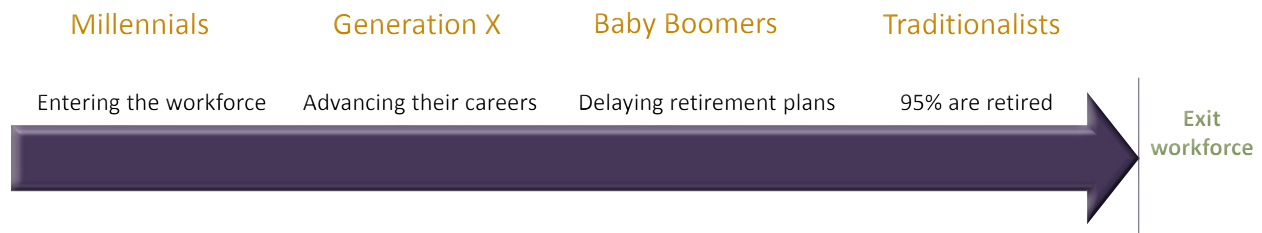
Figure 3: Estimates and Projection of Generations in the U.S. Workforce 2010–2020



Workforce Continuum

People in each generation are in different stages of their professional careers, as illustrated in Figure 4. Millennials are slowly entering the workplace and are projected to comprise 50 percent of the workforce by 2020. Generation Xers are advancing their careers in the workforce. Most Gen Xers are middle managers, while baby boomers fill leadership roles and are approaching retirement. Due to the 2008 recession, millennials are less likely to be employed than were Generation Xers and baby boomers at their age⁵, and baby boomers are delaying retirement and working longer.⁶ Most traditionalists have retired, with only about 5 percent or less active in the workforce today.⁷

Figure 4: Intergenerational Workforce Continuum



Source: AHA CPI, 2014.

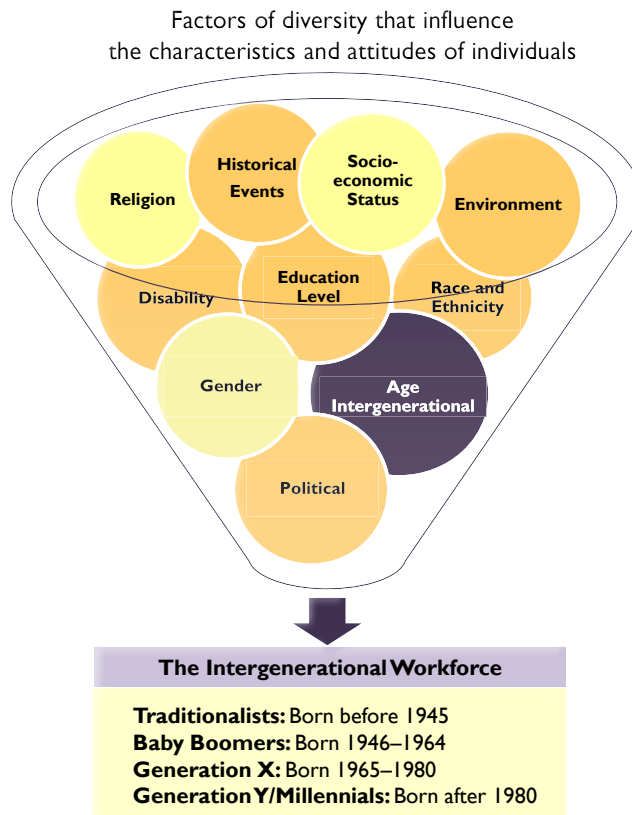
Generational Interaction in the Workplace

According to a Lee Hecht Harrison survey, more than 60 percent of employers are experiencing tension between employees from different generations. The survey found that more than 70 percent of older employees are dismissive of younger workers' abilities, and nearly 50 percent of younger employees are dismissive of their older colleagues' abilities.

The generational tension is a result of different historical experiences and attitudes (Figure 5). Each generation was influenced by the same factors; however, each generation experienced these factors differently. For example, traditionalists and many baby boomers grew up before the civil rights movement while Generation X and millennials grew up after the Civil Rights Act of 1964, thereby shaping their views on race, religion and gender. How the generations experienced such events affects their perceptions of commitment, company loyalty, task management, project execution and professional development. Cultural differences also influence the characteristics and attitudes of individuals in the workplace. For example, new Americans and permanent residents may have different business etiquettes than natural-born Americans in the same generation. These groups may differ in communication styles, their attitudes toward management and organizational hierarchies, and how they value time in the workplace and cope with work volume.

Regardless of the factors impacting generational dynamics in the workplace, a standard level of professionalism in the health care industry is expected of every employee. This ranges from ethical standards of clinical practice that are embedded in licensing requirements to U.S. laws that protect patient privacy, such as the Health Insurance Portability and Accountability Act.

Figure 5: Factors of Diversity



Source: AHA CPI, 2014.

To illustrate the challenges of managing a diverse workforce, health care leaders need an understanding of how each generation experienced the same factors. Table 1 highlights characteristics associated with each generation, their experiences and their views.

Table 1: Overview of Characteristics for Each Generation

	Traditionalists	Baby Boomers	Generation X	Millennials
Major Trait	Loyalty	Competition	Self-reliance	Immediacy
Broad Traits	Sacrifice, loyalty, discipline, respect for authority	Competitive, long work hours	Eclecticism, self-reliance, free agents, work/life balance, independence	Community service, cyberliteracy, tolerance, diversity, confidence
Influential Events	Great Depression, World War II, Cold War, Korean War, suburban sprawl begins, first satellite launches	Watergate, women's rights, JFK assassination, civil rights and Martin Luther King Jr., Vietnam War, man walks on the moon	MTV, AIDS, Gulf War, 1987 stock market crash, fall of communism/Berlin Wall, Challenger shuttle explodes	Internet, social media, 9/11 terrorist attack, deaths of Princess Diana and Mother Teresa
Defining Invention	Fax machine, radio	Personal computer, television	Mobile phone, Walkman, computer	Internet, smart phones (text messaging), social media, instant messaging
Family	Traditional, nuclear	Disintegrating	Latchkey kids, high divorce rate	Blended families
Education	A dream	A birthright	A way to get there	An incredible expense
Money	Put it away, pay cash	Buy now, pay later	Cautious, conservative, save, save, save	Earn to spend

Source: Adapted from a compilation by "Future Workplace" found in *The 2020 Workplace* by Meister, J. and Willyerd, K., 2010. New York: HarperCollins. Copyright 2010 by Jeanne C. Meister and Karie Willyerd.

Millennials

Background

There are 80 million millennials in the United States, and they are the largest age group in American history.⁸ Even with the 2008 recession, millennials are picky about work and do not take a job just to have one. According to a study conducted by Monster.com and Millennial Branding in 2013, only 26 percent of millennials would stay with their current employer and 55 percent viewed their current employers as temporary or a stepping stone in their careers.⁹

Work style and preferences

Millennials are technologically savvy. They grew up with personal computers and used the Internet for the majority of their lives. A majority also use social media on a daily basis. Their major trait includes instant gratification. According to a National Institutes of Health study, 40 percent of millennials believe they should be promoted every two years, regardless of work performance.

Working with different generations

Millennials seek mentorship to grow in their careers. Managers and supervisors can combine daily or weekly challenges with constant feedback and recognition to engage employees in this group and increase their productivity.¹¹

Generation X

Background

Gen Xers are known as the latchkey kids who found themselves at home alone or taking care of siblings because both of their parents were working. As a result, Gen Xers grew up to be independent.

The prime wealth-building period of Gen Xers was affected by the 2008 recession. Without much wealth to begin with, they lost 45 percent of it—an average of about \$33,000.¹² Due to this lower net worth and downward mobility in retirement, Gen Xers are the cohort least likely to exceed the wealth of baby boomers.¹³

Work style and preferences

About 77 percent of Gen Xers will pursue working for an employer that offers increased intellectual stimulation.¹⁴ To engage this group, managers and supervisors need to present new and challenging projects since Gen Xers want to gain new skills and advance their careers. To support employees of this group, managers and supervisors can provide immediate and thoughtful feedback.

Gen Xers value flexibility and freedom in the workplace. According to a Catalyst study in 2001, among Gen Xers, 51 percent of females and 37 percent of males are willing to leave their current position for a job that allows telecommuting, and 61 percent of females and 45 percent of males would leave their current employer for a company that offers flexible work hours.

Working with different generations

Having lived in an era when corporations were failing and laying off employees, Gen Xers are mistrustful of institutions and authority and therefore cautious about investing in working relationships with their employers.¹⁵

Baby Boomers

Background

The 2008 recession had a detrimental effect on baby boomer's retirement accounts; individuals aged 55–64 lost 25 percent of their savings.¹⁶ As a result, baby boomers are remaining in the workforce longer than the previous generation. According to the Employee Benefit Research Institute, many in this generation may need to work up to 13 more years to recover from their losses.

Organizations can entice this group with retirement-oriented benefits such as a 401(k) plan and medical insurance.¹⁷ They can also continue to motivate and retain this group by offering flexible work hours or more vacation time.¹⁸

Work style and preferences

Baby boomers have a strong work ethic, superior communication skills and are emotionally mature.¹⁹ They are also dedicated, loyal and committed to their organizations and professional accomplishments. In the workplace, baby boomers communicate effectively in informal settings and respond best during group meetings or in places where open dialogue is encouraged.²⁰

Working with different generations

Baby boomers are currently leading companies and different generations in the workplace. Their management style is fairly authoritarian. To better motivate Generation X and millennial employees, baby boomers can incorporate an approach that is encouraging and supportive.²¹

Traditionalists

Background

Traditionalists grew up during wartime and postwar periods. They witnessed their parents struggle to make ends meet during the Great Depression of the 1930s. Having lived and adapted to an environment of scarcity, they became financially prudent and value job security. A majority of traditionalists also served in the military during the first and second World Wars. Therefore, it is no surprise that they prefer leadership styles that follow a top-down chain of command in the workplace.

Work style and preferences

Traditionalists bring institutional experience and wisdom to the workplace.²² With a work ethic described as “command and control,” this generation respects the hierarchical structure of the organization and follows rules. To leverage traditionalists' strengths, leaders should clearly identify their roles and tasks in the organization.

Unlike the other generations, this cohort prefers written forms of communication and tends to be uncomfortable communicating through the use of technology.²³

Working with different generations

Traditionalists are loyal to their employers and consider their jobs a lifetime career. They respect authority and follow the rules and chain of command in the workplace. Traditionalists also honor professional seniority and believe that individuals should pay their dues to advance their career.

Working with Different Generations

Despite many generational differences presented in this report, there are similarities among each group that organizations should recognize. Table 2 presents each group's perceptions of workplace culture.

Table 2: Generational Perceptions of Workplace Culture

	Traditionalists	Baby Boomers	Generation X	Millennials
Most important aspects of workplace culture²⁴	Fair (90%)	Fair (86%)	Fair (87%)	Fair (66%)
	Ethical (90%)	Ethical (84%)	Ethical (83%)	Ethical (66%)
	Straightforward (74%)	Straightforward (76%)	Straightforward (74%)	Straightforward (54%)
	Professional (74%)	Professional (70%)	—	Professional (48%)
	Collaborative/team attitude (65%)	Collaborative/team attitude (70%)	Collaborative/team attitude (71%)	—
	—	—	Friendly/social (66%)	Friendly/social (59%)
Top reasons for happiness in the workplace²⁵	Feeling valued (88%)	Feeling valued (87%)	Feeling valued (84%)	Feeling valued (85%)
	Recognition and appreciation (84%)	Recognition and appreciation (78%)	Recognition and appreciation (74%)	Recognition and appreciation (74%)
	Supportive environment (70%)	Supportive environment (71%)	Supportive environment (69%)	Supportive environment (73%)
	Leadership I can relate to (69%)	Leadership I can relate to (71%)	Leadership I can relate to (66%)	—
	—	Capable workforce (64%)	Capable workforce (68%)	Capable workforce (72%)
Reasons for staying in an organization²⁶	Opportunity to advance within the organization	Similar	Similar	Similar
	Learning and development			
	Respect and recognition			
	Better quality of life			
	Better compensation			
Attitudes toward teamwork	—	Likes teamwork	Likes teamwork	Likes teamwork

Concerns related to change²⁷	Doing the same work with fewer resources	Similar	Similar	Similar
	Changes in both the internal and external environment			
	Technology changes			
	Change that is disorganized, unnecessary or both			
	Resistance to change			

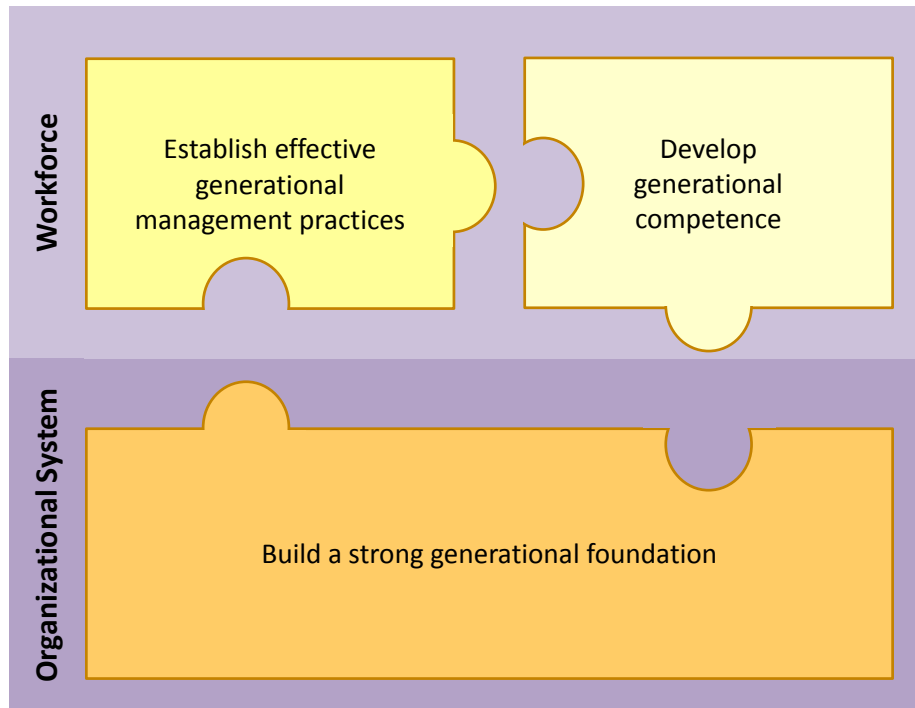
Source: Adapted from "Generational differences in the workplace" by Tolbize, A., 2008.

Strategies to Support Health Care Transformation

The movement from a volume-based payment model to a value-based payment model has health care leaders looking to improve care while lowering costs. An intergenerational workforce can provide steady and able employee capital, optimal operational performance, financial solvency and excellent patient care, despite labor shortages and rising health care costs.

To create this competitive advantage, leaders should develop a culture that supports and fosters intergenerational teams using three intergenerational management strategies: build a strong generational foundation, establish effective generational management practices and develop generational competence. Each strategy influences and supports the others and must operate synergistically (Figure 6).

Figure 6: Interdependence of Three Intergenerational Management Strategies



Source: AHA CPI, 2014.

To build the necessary foundation, leaders need to understand their organization's workforce profile and develop programs and policies to acquire and retain generationally diverse employees. Once these are established, leaders need to tailor their management and communication styles to effectively identify and leverage the different strengths of each generation. After identifying generational strengths and developing practices to leverage them, leaders can encourage and spread understanding and sensitivity among the entire workforce. This, in turn, positively affects retention and acquisition programs and policies. Table 3 provides a checklist of action steps for the three different strategies.

Table 3: Checklist of Strategies to Manage an Intergenerational Workforce

Build a Strong Generational Foundation	
	Conduct an intergenerational evaluation to determine the organization's workforce profile
	Acquire intergenerational talent
	Targeted recruitment efforts
	Organizational website and social media presence of company brand
	Job descriptions connecting tasks/role to organization's mission and values
	Job mobility
	Interactive employee handbook
	Segment retention strategies
	Tailored support services
	Flexible work options
	Educational and career development programs
	Supplemental income opportunities
Establish Effective Generational Management Practices	
	Customize management and communication styles
	Flexible work hours
	Orientation and development programs
	Leverage employees' strengths
	Tailor recognition and awards
	Encourage collaboration in the workplace
	Intergenerational training opportunities
	Social media platform for employee engagement
	Inclusive planning and decision-making opportunities
	Succession planning strategy
Develop Generational Competence	
	Develop generational understanding
	Participate in formal mentoring programs
	Improve communication skills and generational sensitivity

Source: AHA CPI, 2014.

Of these recommended strategies, it is essential that every organization start with:

- conducting an intergenerational evaluation to determine the organization's workforce profile and develop a comprehensive plan;
- implementing targeted recruitment, segmented retention and succession planning strategies; and
- developing tailored communication strategies that cultivate generational understanding and sensitivity.

This list should provide the basis for prioritizing future strategies. As a start, knowing the generational profile of the organization, customizing recruitment, retention and succession planning efforts and tailoring communication strategies and tactics to different generations all provide a foundation for future work.

Building a Strong Generational Foundation

Building a strong foundation is essential to creating a sustainable future for any organization. Organizations need to embrace and celebrate generational diversity by implementing programs and policies to support employees' growth and development.

❑ Conduct an Intergenerational Evaluation to Determine the Organization's Workforce Profile

Hospitals and care systems must first assess their current workforce. Leaders should have a clear picture of which generations are in their organization and how many employees fall into each category. Results can be used to develop a comprehensive plan that addresses generational risks factors, such as supporting employees' professional and organizational growth. Additionally, these results are useful in forecasting future workforce needs. (See Case Studies 1, 5 and 6.)

The AHA, American Organization of Nurse Executives (AONE) and the American Society for Healthcare Human Resources Administration (ASHHRA) developed a workforce planning tool to assist hospitals and care systems in creating a competent and engaged workforce to deliver quality patient care. The report *Developing an Effective Health Care Workforce Planning Model* explores the strengths and weaknesses of existing health care workforce planning models and provides an assessment tool to analyze current and future workforce data and identify organizational strengths and weaknesses.

❑ Acquire Intergenerational Talent

To build a sustainable workforce that will provide high-quality patient care and create a competitive edge for the organization, hospital leaders can apply innovative strategies to attract intergenerational talent and enhance the organization's talent pool.

○ Targeted recruitment efforts

Organizations must expand recruitment efforts to target different generations and create a balanced distribution of employees. For example, the baby boomer generation can be targeted by posting career openings on websites and other media outlets geared toward the 50 and over population. Some agencies specialize in placement of seniors. Additionally, policies can be put in place to take advantage of employee referrals among this generation. (See Case Studies 1 and 5.)

○ Organizational website and social media presence of company brand

The Internet provides job seekers a way to easily conduct research on a prospective employer. Therefore, a health care organization needs to be authentic, transparent and honest about any claims on its website. An organization can employ different types of websites, such as social media and video channels to target different generations. (See Case Study 6.)

○ Job descriptions connecting tasks/role to organization's mission and values

An organization must effectively tailor communication of its mission and values to appeal to the different generations. For example, the majority of millennials value job fulfillment more than compensation and financial rewards. An organization seeking to recruit this group could present job descriptions that explain how a role will contribute to the organization's mission and values. Millennials need to know their work has purpose and feel empowered to achieve it.²⁸ (See Case Study 6.)

○ **Job mobility**

Successful organizations provide growth opportunities for employees, which help retain productive employees and prepare them for future leadership roles. Organizations must ensure that they do not stall the careers of baby boomers nor exclude traditionalists from participating in pivotal organizational activities due to physical limitations, and they should provide younger staff with opportunities for advancement. (See Case Study 3.)

○ **Interactive employee handbook**

Since each generation prefers different communication techniques, organizations should disseminate company policies, expectations and employee benefits information in a variety of ways. An example is using a human resource information system (HRIS) so human resources staff can conduct activities and handle processes electronically. (See Case Example 7.)

□ **Segment Retention Strategies**

Once a generationally diverse and talented workforce is in place, leaders can focus on policies and procedures to retain productive employees and prevent high and costly turnover. The average turnover cost for a millennial employee can be upward to \$75,000.²⁹ Tailoring support services to different generations, providing flexible work options, offering educational and career development programs and providing supplemental income opportunities will incentivize employees.

○ **Tailored support services**

Organizations can develop employee support services to address the evolving needs of employees, such as caring for dependents and elderly parents. (See Case Study 1.)

○ **Flexible work options**

To retain talent, especially individuals approaching retirement, organizations can provide lucrative options for continued employment, whether full-time or part-time, and a benefits package or special work accommodations that support an employee's needs. Organizations can also provide sabbatical opportunities to rejuvenate employees. (See Case Study 1.)

○ **Educational and career development programs**

Organizations will need to find innovative ways to advance the skill sets of their employees. According to a survey by McCrindle Research, 90 percent of millennials who received periodic training from their employers were motivated to stay with their companies.³⁰ (See Case Study Studies 5 and 6.)

○ **Supplemental income opportunities**

Organizations must offer a competitive salary that is commensurate with each employee's skills and experience. They might also offer additional income options to supplement an employee's salary. For example, baby boomers, whose retirement accounts were affected by the 2008 recession, may want additional work opportunities to boost their income. (See Case Study 6.)

Establishing Effective Generational Management Practices

Organizational leaders will need to increase their level of understanding of each cohort to better manage the workforce and relieve generational tensions in the workplace.

□ Customize Management and Communication Styles

Hospital leaders should tailor management and communication styles for each generation (see Table 5). A one-size-fits-all approach will not effectively lead or motivate all generations. Traditionalists may be reluctant to accept change. Baby boomers want respect for their knowledge and experience. Generation X prefers independence and flexibility. Millennials like regular feedback and career coaching.³¹

○ Flexible work hours

The world is becoming more hyperconnected. Cell phones and the Internet have already blurred the lines between work and free time, making it difficult to achieve work-life balance. Managers can minimize this issue by offering more flexible work hours. In a study conducted by Future Workplace, flexible hours and generous telecommuting policies were ranked by younger employees as being more important than salary. According to author Dan Schawbel, Fortune 500 companies—which do not usually offer flexible work hours—have difficulties retaining millennials.³²

Table 4 shows that greater flexibility in the workplace is an option that resonates across the generations. (See Case Study 4.)

Table 4: Work Hours Options that Appealed to Different Generations³³

Traditionalists	Baby Boomers	Generation X	Millennials
Freedom to set own hours if the work gets done (76%)	Freedom to set own hours if the work gets done (74%)	Freedom to set own hours if the work gets done (73%)	Freedom to set own hours if the work gets done (63%)
Working full-time for a firm (64%)	Working full-time for a firm (64%)	Working full-time for a firm (63%)	Full-time job with extended time off as needed for personal reasons (53%)
Full-time job with extended time off as needed for personal reasons (46%)	Four-day workweek with 10-hour days (58%)	Full-time job with extended time off as needed for personal reasons (59%)	Working full-time for a firm (50%)
Four-day workweek with 10-hour days (44%)	Full-time job with extended time off as needed for personal reasons (56%)	Four-day work week with 10-hour days (52%)	Four-day work week with 10-hour days (32%)

Source: Adapted from “Generational differences in the workplace” by Tolbize, A., 2008.

○ **Orientation and development programs**

Many orientation and development programs include policies that allow employees to rotate through different departments and learn more about the organization. For example, gamification uses game design and mechanics to engage a target audience and change behaviors, teach new skills or encourage innovation.³⁴ Because gamification can tap into the competitive nature of individuals to reach new levels, many organizations have begun to use it to recruit, develop and motivate employees. AETNA, for example, has launched an online social game called Mindbloom that is aimed at improving the health and wellness of employees and health care customers.³⁵ (See Case Study 4.)

□ **Leverage Employees' Strengths**

Organizational leaders and managers need to learn the characteristics of each cohort to better leverage employee strengths and effectively distribute projects for optimal performance and outcomes. For example, traditionalists and baby boomers have many years of professional experience and a robust network of connections. Generation Xers and millennials are technologically savvy and have a strong academic background—they hold more graduate degrees than traditionalists and baby boomers. (See Case Example 8.)

□ **Tailor Recognition and Awards**

Each generation expects to be rewarded differently. An organization can tailor its reward programs to meet the needs of its generationally diverse workforce. For example, traditionalists want to be praised for their time and dedication; baby boomers prefer name recognition and prestige; Generation Xers prefer programs that will help them balance work and life; and millennials want career development opportunities.³⁶ (See Case Study 6.)

□ **Encourage Collaboration in the Workplace**

Social interaction increases collaboration in the workplace and should be encouraged. Organizations need to develop strategies to bring all employees together. Health care leaders can develop intergenerational training programs and other professional development opportunities to encourage workforce collaboration. Understanding the different qualities of each generation will reduce or prevent friction in the workforce.

○ **Intergenerational training opportunities**

Organizations can take an active role in educating employees on generational issues, to improve understanding, respect and productivity among different cohorts.³⁷ Organizations must also foster generational understanding at the leadership level. CEOs, VPs and executive management teams that lead by example can optimize workforce productivity and prevent clashes among a diverse group of employees. (See Case Studies 3, 4 and 6.)

Health care leaders can also involve employees in adjusting workplace conditions to better cater to and support staff. This includes developing a platform for employee engagement.

○ **Social media platform for employee engagement**

Health care leaders can establish platforms for engagement to encourage interaction and information sharing among all employees. An example is setting up an organizationwide social media network that connects all staff. (See Case Study 6.)

- **Inclusive planning and decision-making opportunities**

Health care leaders can increase participatory governance by allowing marginalized cohorts the opportunity to provide input and feedback in workplace planning and decision making. Organizations can benefit from the insights and perspectives of different generations.³⁸ For example, governing bodies such as the board of trustees or board of medical staff can be reorganized to have representation from each generation. (See Case Studies 2 and 4.)

- **Succession planning strategy**

The health care field has the highest CEO turnover compared to other industries.³⁹ With 75 percent of health care leaders estimated to retire in the next decade,⁴⁰ health care leaders can prepare for acute talent shortages by accelerating the development of the next generation of leaders, which should include front-line management. Learning must be integrated with daily work to effectively transfer knowledge and expertise. (See Case Studies 2 and 3.)

Developing Generational Competence

While leaders play a role in relieving generational tensions, individual employees also need to understand the unique qualities of each generation. Education and professional development activities are effective in breaking down stereotypes and preventing friction between the cohorts. Experienced workers can pass skills along to new workers and vice versa. These activities and programs break down generational silos as each cohort learns from the others.

□ Develop Generational Understanding

Every individual in the organization must recognize the different characteristics of each generation, especially how work is perceived and performed. For example, baby boomer physicians believe in building personal relationships with patients; being a doctor is a 24/7 commitment to their patients.⁴¹ On the other hand, younger physicians like having a predictable work schedule and more work-life balance. (See Case Study 3.)

□ Participate in Formal Mentoring Programs

Mentoring and shadowing programs enable each individual to develop tools to work effectively with all generations. Experienced workers can pass along skills to new workers and vice versa. These programs break down generational silos as each cohort learns from the others. (See Case Studies 1, 2 and 4 and Case Example 9.)

□ Improve Communication Skills and Generational Sensitivity

Since each generation has its own style of communicating, all employees must learn the differences to work effectively with colleagues. Further, each generation brings its own ideas of what is appropriate in the workplace and how to achieve goals. Table 5 provides a summary of each generation's communication preferences. (See Case Study 3.)

Table 5: Communication Styles of Each Generation

	Traditionalists	Baby Boomers	Generation X	Millennials
Style	Formal	Semiformal	Not so serious; irreverent	Eye-catching, fun
Content	Detailed, prose-style writing	Chunk it down but give me everything	Get to the point (what do I need to know?)	If and when I need it, I'll find it online
Context	Relevant to my security, historical perspective	Relevant to the bottom line and my rewards	Relevant to what matters to me	Relevant to now, today and my role
Attitude	Accept and trust authority and hierarchy	Accept the “rules” as created by the traditionalists	Openly question authority, often branded as cynics and skeptics	OK with authority that earns their respect
Tactics	Print, conventional mail, face-to-face dialogue or by phone, some online information/ interaction	Print, conventional mail, face-to-face dialogue, online tools and resources	Online, some face-to-face meetings (if really needed), games, technological interaction	Online, wired, seamlessly connected through technology
Speed	Attainable within reasonable time frame	Available, handy	Immediate, when I need it	Five minutes ago
Frequency	In digestible amount	As needed	Whenever	Constant

Source: Adapted from a Deloitte Consulting and the International Association Business Communicators study found in The 2020 Workplace by Meister, J. and Willyerd, K., 2010. New York: HarperCollins. Copyright 2010 by Jeanne C. Meister and Karie Willyerd.

Despite the differences in communications styles, there are commonalities in the modes of communication used in the workplace (see Table 6).

Table 6: Modes of Communication Used by Each Generation⁴²

	Traditionalists	Baby Boomers	Generation X	Millennials
Desktop computer	Desktop computer (87%)	Desktop computer (81%)	Desktop computer (75%)	Desktop computer (71%)
Landline phone	Landline phone (87%)	Landline phone (84%)	Landline phone (81%)	Landline phone (67%)
Fax	Fax (78%)	Fax (74%)	Fax (65%)	Fax (52%)
Mobile/cell phone	Mobile/cell phone (73%)	Mobile/cell phone (66%)	Mobile/cell phone (65%)	Mobile/cell phone (46%)
Laptop computer	Laptop computer (43%)	Laptop computer (44%)	Laptop computer (44%)	Laptop computer (26%)
PDA's with phone and Internet	PDA's with phone and Internet (11%)	PDA's with phone and Internet (15%)	PDA's with phone and Internet (15%)	PDA's with phone and Internet (6%)

Source: Adapted from “Generational differences in the workplace” by Tolbize, A., 2008.

Creating High-Performing Teams

Hospital leaders can leverage the three management strategies outlined in this report to create high-performing teams that are flexible and adaptable to changing conditions.

□ Set Goals

Hospital leaders can begin by implementing programs that address the intergenerational workforce. Leaders must identify the needs and goals of the organization and align workforce initiatives. Doing so facilitates creating a realistic and sustainable blueprint for action.

□ Align the Workforce to the Organization's Vision of the Future

○ Be Transparent

Hospital leaders must effectively communicate the future direction of the organization. Keeping the workforce abreast of intergenerational initiatives and programs can increase employee engagement, encourage participation and promote shared responsibility.

○ Coordinate with human resources staff

After defining and communicating the organization's vision for the future, hospital leaders will need to coordinate and rely on human resources staff to acquire intergenerational talent that will best fit the culture of the organization.

□ Manage Expectations when Implementing Intergenerational Workforce Initiatives

○ Gain employee buy-in

Hospital leaders, especially in generationally diverse organizations, may face difficulty gaining employee buy-in for new organizational directions. One strategy is to give staff an opportunity to provide input on key decisions. While hospital leaders should not expect to appease everyone, employees will be more accepting of proposed organizational changes if they have input in the process.

○ Align employee expectations

Generationally diverse employees will differ in their expectations on how to approach generational workforce initiatives. Hospital leaders must address doubts and present future and potential concerns to find common ground with employees.

○ Hold teams and individual employees accountable

Hospital leaders must implement organizationwide strategies that hold teams and individual employees accountable for taking advantage of intergenerational learning and development opportunities. Examples include tracking staff participation in educational and team-based learning programs that focus on managing and working with an intergenerational workforce.

□ Develop High-Performing Teams

○ Design agile teams

Hospital leaders should develop agile, intergenerational teams that are focused, fast and flexible in uncertain conditions.

○ Create cross-functional, intergenerational teams

Hospital leaders should develop cross-functional, intergenerational teams, which include specialists from different fields. The diversity of expertise, skills and experience found in cross-functional, intergenerational teams makes them versatile and efficient for executing projects.

□ Cultivate Staff through Team-Based Learning

Through team-based learning, health care leaders can leverage one of the most valuable assets of their organization—their employees. There are five routines to team-based learning:⁴³

○ Establish rounds

Work is delegated to the most eligible junior member of the team—that is someone who meets the minimum background to perform the job—giving them an opportunity to get early exposure and experience doing more advanced tasks.

○ Conduct formal observation and feedback

Constructive feedback puts emphasis on professional growth and fosters behavioral change. This process ensures that employees are assigned meaningful responsibilities early in their tenure and have the opportunity to learn and grow in their positions.

○ Shadow

Shadowing provides less experienced employees with the opportunity to engage and collaborate with more experienced employees and vice versa.

○ Conduct after-action reviews

After-action reviews can be helpful in identifying effective and ineffective practices and improving processes to provide better patient care.

○ Develop team workshops

Workshops can help employees become aware of new routines and understand changing practices.

Case Studies

Hospitals and care systems throughout the United States have made significant strides to address the challenges of managing an intergenerational workforce. These innovative organizations apply a combination of strategies to build a strong organizational foundation, establish generational management strategies and develop generational competence at all levels of the organization (Table 7). The case studies that follow provide examples of successful approaches currently being used in health care and other organizations.

Table 7: Successful Approaches to Manage an Intergenerational Workforce

Strategy No.	Building a Strong Generational Foundation	Case Study and Example No.
1	Conduct an intergenerational evaluation to determine the organization's workforce profile	1, 5 and 6
2	Acquire intergenerational talent	—
2-A	Targeted recruitment efforts	1 and 5
2-B	Organizational website and social media presence of company brand	6
2-C	Job descriptions connecting tasks/role to organization's mission and values	6
2-D	Job mobility	3
2-E	Interactive employee handbook	7
3	Segment retention strategies	—
3-A	Tailored support services	1
3-B	Flexible work options	1
3-C	Educational and career development programs	5 and 6
3-D	Supplemental income opportunities	6
Strategy No.	Establishing Generational Management Practices	Case Study and Example No.
4	Customize management and communication styles	-
4-A	Flexible work hours	4
4-B	Orientation and development programs	4
5	Leverage employees' strengths	8
6	Tailor recognition and awards	6
7	Encourage collaboration in the workplace	—
7-A	Intergenerational training opportunities	3, 4 and 6
7-B	Social media platform for employee engagement	6
7-C	Inclusive planning and decision-making opportunities	2 and 4
7-D	Succession planning strategy	2 and 3
Strategy No.	Developing Generational Competence	Case Study and Example No.
8	Develop generational understanding	3
9	Participate in formal mentoring programs	1, 2, 4 and 9
10	Improve communication skills and generational sensitivity	3

Source: AHA CPI, 2014.

Case Study 1: Atlantic Health System

Atlantic Health System (AHS) owns and operates Morristown Medical Center, Overlook Medical Center and Newton Medical Center, all in New Jersey. The three hospitals combined have 1,308 beds and more than 2,750 affiliated physicians.

Background

Atlantic Health System has a generationally diverse workforce population. About 4 percent are traditionalists, 46 percent are baby boomers, 33 percent are Gen Xers and 17 percent are millennials.

Strategy 1

At Atlantic Health System, employees age 50 and above have an average tenure of 16 years. To offset potential loss of organizational knowledge and professional expertise due to retiree exodus, the health system created a gap or fill analysis to better develop workforce management strategies. The organization also expanded its generational analysis report to include turnover of different age groups. Analysis findings help the organization retain and train current and new employees to best meet future staffing needs.

Interventions

Strategy 2-A

Atlantic Health System established recruiting practices that target employees 50 years and above. The health system reaches out to clubs, organizations and events for workers, posts jobs in various media outlets geared toward the 50-plus population, utilizes placement agencies geared to this group and takes advantage of employee referrals to target retirees.

Strategy 3-A

To support employees age 50 and above, Atlantic Health System allocated \$2 million for its ergonomics department to install 286 ceiling track lifts—used to reposition and transfer patients up to 550 pounds—across 47 departments. The ceiling track lifts help reduce the stress and strain of moving nonmobile patients.

To support millennials and Gen Xers who are starting families and baby boomers who are supporting children, Atlantic Health System provides on-site child care centers and early childhood education to the children and grandchildren of employees. The child care centers at Morristown and Overlook Medical Centers are accredited by the National Association for the Education of Young Children and have an annual budget of \$260,000. In 2013, nearly 250 children were enrolled in the two centers.

To assist employees taking care of older relatives, Atlantic Health System also offers elderly care. This service helps employees find caregivers and get resources on nursing homes and residential and assisted living facilities. In addition, the elderly care program helps employees navigate Medicare and Medicaid, emergency response, transportation, meal programs, adult day programs and home health care support services.

Strategy 3-B

To retain talent and continue to benefit from the experience and expertise of employees age 50 and above, Atlantic Health System established the 1,000 Hour Club. The program allows retirees to return to part-time and per-diem work three months after they start receiving retirement benefits.⁴⁴

Strategy 9

Atlantic Health System fostered generational partnerships by establishing a mentorship program that gives older employees an opportunity to work and share their knowledge and experience with younger employees.⁴⁵ In addition, employees work on temporary assignments in different departments and participate in team projects and formal job rotation programs to gain new experience.

Atlantic Health System also offers an in-house faculty academy where experienced employees and experts in their respective fields are asked to present their work in the organizationwide learning community. Of the academy's instructors, 70 percent are age 50 and over.

Results

Fortune magazine ranked Atlantic Health System as one of the 100 best companies to work for in 2013. Since 2006, AARP has honored Atlantic Health System annually as one of the best employers for individuals age 50 and over because of its progressive workplace policies and practices designed to attract and retain older employees. In 2012, the health system hired 254 workers age 50 and over. Atlantic Health System also maintained a robust employee retention rate of 97.3 percent, well above the national average.

The ceiling track lifts at Atlantic Health System helped prolong the careers of older clinical staff and provided promise to younger employees of a long and productive work life. Since these lifts were installed, injuries have been reduced, and the quality of life for more than 1,000 employees in 33 departments has improved. With nearly 320 ceiling track lifts installed, Atlantic Health System reduced lost workdays and associated costs by 40 percent to 60 percent.

Nearly 180 employees take advantage of the on-site child care center at Morristown and Overlook Medical Centers. On the 2013 annual parent satisfaction survey, 100 percent of respondents said they were "satisfied" or "very satisfied" with the program.

Atlantic Health System has successfully retained the experience and expertise of its employees age 50 and over. Between 2012 and 2013, the 1,000 Hour Club increased the number of the health system's rehires by 16 percent.

About 112 pairs of employees have participated in the mentorship program since its inception. The quarterly reports submitted by mentees showed overall satisfaction from participating in the program.

Lessons Learned

Leadership buy-in was a key to success for these programs at Atlantic Health System. For example, the installation of ceiling track lifts received full support from senior leadership even before their full implementation throughout different departments. Senior leadership allocated funding to pilot four ceiling track lifts in a Morristown Medical Center ICU unit and five portable floor lifts in five nursing units across the health system with the goal of decreasing injury rates among staff and costs associated with these injuries.

Another ingredient contributing to the success of the Atlantic Health System programs is the enthusiasm of staff. Employees take full advantage of the opportunities provided to them. Results show high participation in the programs.

Atlantic Health System

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Case Study 2: Baptist Health Lexington

Baptist Health Lexington, in Lexington, Kentucky, is a 383-bed hospital that serves as a medical research and education center.

Background

To draw upon the talent of its intergenerational workforce, Baptist Health Lexington established a shared governance model that provides employees an opportunity to collaborate with colleagues and organizational leaders to shape their work environment.⁴⁶ This model empowers employees to meet patient needs and to support and enhance quality and cost effectiveness of care delivery.⁴⁷

To prepare and develop its intergenerational workforce, Baptist Health Lexington offers leadership development opportunities. The Evolving Leaders Program provides staff at all levels with ongoing professional and personal development.

Interventions

Strategy 7-C

The Nursing Leadership Council, part of the shared governance structure, is comprised of staff nurses at the unit level. The council has 18 members and is generationally diverse with eight baby boomers, six Gen Xers and four millennials.

Council members provide recommendations in determining policies that affect patients and the nursing practice and serve as the point of communication for nursing activities.⁴⁸ For example, in 2013, the council established a program that recognizes high-performing nurses in a formal ceremony that gives patients and their families an opportunity to speak about their experiences and express gratitude.

Strategies 7-D and 9

In 2003, Baptist Health Lexington established the Evolving Leaders Program to develop current and emerging leaders. This program is open to staff from all departments and disciplines and is one criterion used when considering internal candidates for promotions.

The coordinating team of the Evolving Leaders Program sets program guidelines and evaluates the curriculum to reflect organizational needs, strategic priorities and feedback.⁴⁹ This team selects in-house subject matter experts who teach the courses and serve as mentors in the program. Currently, the faculty includes 11 baby boomers, eight Gen Xers and two millennials.

The program consists of three levels. The first level requires participants to complete a series of courses within the year. The 13 courses offered adhere to the program's four pillars: finance and performance accountability, clinical care improvement, organizational culture and customer relations, and people and workforce development. In 2013, 100 employees participated at this level. Of this cohort, 35 percent were baby boomers, 40 percent were Gen Xers and 25 percent were millennials. The second level includes a more rigorous set of the aforementioned courses.

The third level provides mentorship opportunities. The coordinating team links protégés to mentors, who serve as guides in meeting the participants' development goals for the year. The mentor and protégé relationships provide an opportunity to learn and practice new skills and gain direct feedback not available in classroom settings.

Results

In the Evolving Leaders Program, approximately 40 percent of participants are baby boomers, 30 percent are Gen Xers and 30 percent are millennials. In addition, 50 percent of new managers and department directors, as they are hired into the organization, have enrolled in the program. The other 50 percent enters the program sometime during the year as they complete leadership orientation and fully acclimate to their roles.

The Evolving Leaders Program also helps build a steady supply of highly trained and motivated nurse leaders. Over a three-year period, 75 percent of nurses who participated in the program were promoted to nurse managers and positions that were extended.⁵⁰ In addition, the hospital has a nursing vacancy rate of less than 4 percent and an overall vacancy rate of 3 percent.⁵¹

Lessons Learned

Baptist Health Lexington learned that employees appreciate the opportunity to participate in shared governance. For example, in collaboration with the chief nurse executive, the Nursing Leadership Council was able to set standards and policy, which in turn direct the requirements for the nursing professional practice model and help shape nursing practices at the hospital.

When Baptist Health Lexington used internal experts to serve as faculty in the Evolving Leaders Program, it was able to reduce program expenses, promote sharing of organizational wisdom and assimilate employees in the organizational culture.

A continued challenge for the Evolving Leaders Program's coordinating team has been to create a more flexible, dynamic curriculum that makes it easier for participants to attend the courses in person. There are a growing number of off-campus staff members who wish to participate in the program.

Also, as the environment of health care changes rapidly, mentors and faculty members who are committed to the Evolving Leaders Program face challenges in meeting the work demands within their own roles and departments. To show support and recognize their contributions, the coordinating team has begun holding mentor and speaker appreciation luncheons and continued to provide development opportunities for those who give of their time.

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Case Study 3: Beaumont Health System

Beaumont Health System serves the Detroit metropolitan area with hospitals in Royal Oak, Troy and Grosse Pointe, Michigan, six medical centers and four nursing facilities.

Background

Beaumont Health System has approximately 17,000 employees. To prepare its workforce for future labor shortages and intergenerational diversity, the health system provides generational diversity training to its leaders and staff, hosts an annual conference that integrates generational topics and offers all employees courses to encourage open dialogue about generational differences in staff meetings.

Interventions

Strategies 2-D and 7-D

Beaumont Health System developed a succession planning strategy designed to prepare recent graduates for hospital leadership roles. Its administrative fellowship program is open to individuals with a graduate degree in health care administration, business administration, public health, nursing or a related field. The program has three components: rotational experience, which fosters a broad understanding of operations management and leadership; project work, which allows fellows to lead specific projects to improve the organization; and leadership support, which integrates the fellow as a member of the executive team.

Strategy 7-A

In 2005, Beaumont Health System dedicated its annual leadership retreat to intergenerational diversity training. The retreat covered best practices that foster generational understanding, including leveraging employees' strengths, preventing generational clashes and maximizing teams to increase productivity.

Beaumont Health System also hosts an annual diversity conference for all staff. In 2009, the theme was "Generational Diversity in the Health Care Workforce." The half-day event was held at an off-site location so that employees were able to fully engage. The keynote speaker was Chuck Underwood, founder and principal, Generational Imperative, Inc. His presentation "Generational Imperative for Beaumont" introduced the different characteristics of each generation, the major events that shape them and how those generational experiences have manifested in the workplace. A Beaumont employee facilitated a game of "diversity jeopardy" for conference attendees, and each category of the jeopardy board included a generational diversity topic.

Strategy 8

In addition, the health system offers a course called "Generation Sensation" that is open to employees of all ages and job titles. This educational program provides a safe space for open dialogue to discuss generational differences in the workplace, whether real or perceived.⁵² This approach provides individuals with a better understanding of the unique strengths, differences, perspectives and unique challenges of each generation in the workplace, which will improve communication and teamwork.

Strategy 10

To supplement the training opportunities at Beaumont Health System, informal generational management practices are encouraged at all levels of the organization. For example, during staff meetings, employees discussed lessons learned from their participation in the generational diversity course and facilitated discussions around the keynote speech, which remains accessible on the diversity website. Employee relations representatives share generational resources with employees and managers, and managers are introduced to generational management concepts during their orientation.

Results

Since its inception, the administrative fellowship program has had five participants. As of 2013, three of the fellows hold key leadership positions at Beaumont Health System.

The health system's 2009 conference on generational diversity had the highest attendance of its annual diversity conferences to date. Approximately 300 employees participated, including physicians, organizational leaders and volunteers, and feedback about the program and speakers was overwhelmingly positive.

Through small group discussions and interactive exercises in the "Generation Sensation" course, participants have gained strategies to help combat potential conflicts that can occur because of generational differences.

Lessons Learned

The focus on generational diversity has piqued organizationwide interest on generational topics. Hospital leaders learned that employees were eager to understand generational differences and improve communication skills to enhance working relationships among the generations.

Beaumont Health System

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Case Study 4: Eastern Idaho Regional Medical Center

Eastern Idaho Regional Medical Center is located in Idaho Falls, Idaho. Its service area has a population of about 350,000.

Background

Eastern Idaho Regional Medical Center has 1,373 employees. The majority of its workforce are Gen Xers, who make up 41 percent of all employees. Baby boomers make up 31 percent of the workforce, and millennials, 25 percent. Traditionalists comprise 3 percent of the medical center's workforce.

In 2005, employees at Eastern Idaho Regional Medical Center began expressing concerns about generational issues in the workplace. By 2009, it inspired organizational change. The goal was to understand the strengths and differences of each cohort and leverage those strengths to create a work environment that values generational differences. Generational initiatives were developed to engage the workforce, increase employee recruitment and retention, increase productivity and improve patient satisfaction.

Interventions

Strategy 4-A

Eastern Idaho Regional Medical Center offers self-scheduling for nursing staff. Nurses have the option to work four-, eight- or 12-hour shifts. The hospital learned that 1) baby boomers prefer shorter shifts as they found it maximizes their physical and mental capacity, 2) younger generations—millennials and Gen Xers—prefer 12-hour shifts because it gives them more personal and family time, and 3) Gen Xers prefer night shifts because it allows them to work independently and have less interaction with physicians and leadership.

Strategy 4-B

Some clinical supervisors became more lenient enforcing a policy that limited staff members from transferring to another department until a minimum of 12 months of employment was fulfilled. This change was meaningful to staff, especially millennials and Gen Xers, because it gave them the opportunity to not only gain more experience in other areas of the organization but also pursue interests outside their current departments, prior to the minimum employment requirement of 12 months.

Strategy 7-A

To transform organizational culture, Eastern Idaho Regional Medical Center educates managers and directors on intergenerational topics to help them understand the complexities of managing a diverse staff. For example, clinical supervisors and charge nurses receive educational training about generational diversity in the workplace. As part of their training, they are asked to conceptualize and put into practice what they have learned in the course and identify ways of using generational education to create a strong team.

Strategy 7-C

The Premium Pay Committee—responsible for developing employee benefits packages at Eastern Idaho Regional Medical Center—had difficulty finding common ground with employees from different generations because the majority of its members were Gen Xers. The committee was reorganized to include employees from other generations. The first task of committee members was to decrease employee overtime. Mindful of the different cohorts, the committee developed an extra shift premium, which decreased overtime in the nursing department by 25 percent. Employees were involved in the decision making and appreciated the opportunity to support organizational needs.

Strategy 9

In 2013, the hospital initiated a project, Advanced Clinical, which allows physicians to complete all patient documentation and orders on the computer and eliminates the use of paper charts. Many nurses feared the change. To help with this transition, younger employees, who were technology savvy, were assigned to serve as master trainers to acquaint older employees with the new system. Older employees learned to rely on younger cohorts and benefit from their technological proficiency.

Results

The intergenerational strategies contributed to improvement in employee retention. The nursing turnover rate decreased from 15.7 percent in 2012 to 13 percent in 2013. No other departments have more than a 10 percent turnover rate. Previously, some departments had a turnover rate as high as 33 percent.

The intergenerational training and development program contributed to greater understanding and tolerance of different generations and increased collaboration. Clinical supervisors and charge nurses were better prepared to manage their generationally diverse teams. This contributed to increased staff involvement in decision making, improved patient satisfaction scores (at least a 3 percent increase at each unit but higher in others) and fewer turnovers by department.

Lessons Learned

Changing the company culture does not occur overnight. Many employees at Eastern Idaho Regional Medical Center embraced the intergenerational development opportunities, but some are still having difficulty translating what they have learned into practice.

Implementing flexible work hours is a challenging feat for the hospital industry. Hospitals need to provide care around the clock, making it difficult to align with the flexible scheduling needs of physicians, nurses and other employees.

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Case Study 5: ProMedica

ProMedica is a nonprofit health care organization based in Toledo, Ohio. The 11 hospitals in the network serve 27 counties in northwest Ohio and southwest Michigan.

Background

ProMedica has more than 14,000 employees, 400 board members and 3,000 volunteers.

Strategy 1

To determine workforce needs, ProMedica conducted an employee opinion survey. It found that employees 48 years and older were disconnected from the organizational direction and that leadership and employees under the age of 28 were focused on short-term employment and dissatisfied with their current position and pay. To complement the survey and better understand its workforce, ProMedica reviewed its internal data to assess current labor supply, forecast labor demands and develop strategies that would meet the evolving needs of the organization.

Interventions

Strategy 2-A

To meet community needs amid nationwide physician shortages, ProMedica focused on recruiting students and training physicians and allied health professionals. In 2010, ProMedica and University of Toledo formed an educational partnership to expand their residency programs. The organizations established an academic health center, designed to enhance clinical education and research in the community and prepare future health care professionals.^{53,54}

To address nursing shortages, ProMedica also established a nurse residency program. This program is available to new nursing graduates with fewer than 12 months of direct experience in acute care.⁵⁵ Intended to prepare and transition new nurses in their professional practice, the program provides 18 to 40 weeks of guided learning, focusing on areas such as critical-thinking skills, patient safety, quality care, evidence-based practice and teamwork. Throughout their first year of practice, new nurses receive continued professional and social support to help them succeed in their jobs.

In 2013, in partnership with the United Way, ProMedica expanded its summer youth program. The program—aimed at disadvantaged youth ages 16 to 21 in the Toledo area—provides participants with eight weeks of employment, working 24 hours per week. Candidates are matched to different jobs in several hospitals and business units to expose them to health care careers and provide real-world experience. The program was established to serve as a pipeline for future health care workers. Top performers are hired back into the program each summer or offered permanent positions within ProMedica, giving them tuition assistance options.

Strategy 3-C

The highest turnover in the first year of employment at ProMedica was among staff between the ages of 20 and 30. To target this group, ProMedica developed retention initiatives, such as tuition reimbursement, loan forgiveness, fellowship opportunities and a nursing residency program.

ProMedica offers two distinct programs for employees who wish to further their education: a fee waiver for students attending the University of Toledo and a tuition-assistance program that provides prepaid or reimbursed funds (depending upon degree type) to full-time employees and a prorated amount to part-time employees. The fee-waiver program provides free tuition up to eight credit hours per semester

for full-time employees and 50 percent of tuition for part-time employees. In addition, the UT-ProMedica scholarship is offered by the University of Toledo at no cost to ProMedica employees interested in any degree program. There is no employment commitment or repayment obligation for employees.

In September 2012, through a grant partnership with Owens Community College, ProMedica created a full-time, grant-funded career coach position to deliver career services offerings to employees. The intent is to improve retention for all ages, especially younger workers who are beginning their careers and require guidance as well as older workers who may require a job change to remain engaged in their work and the organization. The career coach 1) offers employees analysis and guidance through interest inventory assessments, 2) helps employees create short- and long-term career plans, 3) offers assistance with higher education selection and funding and 4) guides employees on resume writing, internal job searches and job interviews. Services are offered through one-on-one meetings and group workshops.

Results

In the first year of the academic health center, residency rotations grew from 17 to 31 in the academic year.⁵⁶ By 2016, University of Toledo students at ProMedica will increase to 63 residency rotations, of which 29 are new rotations and 26 are expanded rotations.⁵⁷ New rotations that have been developed and implemented include: anesthesiology; emergency medicine; obstetrics and gynecology; medical oncology; and ear, nose and throat.⁵⁸

The nurse residency program continues to grow in popularity and effectiveness. From May of 2012 through August 2013, 350 nurses have been hired into the program for ProMedica's acute care facilities. In 2011, turnover within the first year of employment for registered nurses was 26 percent, and more than 30 percent of those terminated were between the ages of 20 and 30. By August 2013, turnover in the first year of employment decreased to 17 percent, and approximately a third of this reduction was a direct result of the residency program.

Utilization of career services offered by the career coach has increased every month since the position was created. Employee satisfaction survey results indicate that before the career coach was hired, employees highly valued tuition and scholarship offerings at ProMedica (the highest ranked response to a question on the survey), but they were not satisfied with their ability to utilize their strengths and skills in their current positions (among the lowest ranked responses). In September 2013, a second data point was collected to determine if an impact has been made in this area.

More than 250 youth candidates applied for the 2013 summer youth program, and 70 were hired to work 24 hours per week. Three youth employees were given permanent positions at the end of the summer. Many participants chose to pursue health care-related careers after high school and have developed deep bonds with their supervisors and co-workers, who also rate their own participation in the program as excellent and rewarding. Pre- and post-employment assessment of job readiness skills showed large gains in the skill sets of most participants.

Lessons Learned

Multifaceted approaches to recruiting and retaining workers of all ages are critical for ensuring a constant supply of quality employees. Programs targeted at addressing the needs of specific generations have been helpful in these approaches. The health system is now considering other engagement and satisfaction measures such as work-life balance and physician labor demands.

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Case Study 6: Texas Health Resources

Texas Health Resources is a health care delivery system located North Texas. Its service area consists of 16 counties with a population of 6.2 million.

Background

Strategy 1

Texas Health Resources collected data to determine the workforce composition of its hospitals, clinics and other facilities, with similar standards and methodology used for collecting patient population demographics such as language, age, ethnicity and race. In 2012, Texas Health Resources' workforce consisted of nearly 2 percent traditionalists, 36 percent baby boomers, nearly 50 percent Gen Xers and 13 percent millennials.

Interventions

Texas Health Resources uses the information from its workforce diversity profile to manage the health system's intergenerational workforce and craft meaningful human resources strategies and interventions. The health system also uses annual employee engagement surveys to assess employee dynamics and work processes and identify strategies to effectively manage and improve teams.

Strategy 2-B

Texas Health Resources created a YouTube channel featuring its facilities, programs, clinicians, employees, health care best practices and quality improvement awards. The channel is customized and maintained to draw a wide audience. Job seekers can view testimonials from current staff and volunteers and learn more about the organization and career opportunities.

Strategy 2-C

Texas Health Resources instills a culture of caring—"individuals caring for individuals, together"—through a set of values, behaviors and service standards referred to as "the promise." Employees are evaluated annually based on nine behaviors, such as treating colleagues and patients with courtesy, dignity and trust to promote teamwork and caring for the body, mind and spirit. Prior to hiring, prospective employees complete an online assessment to determine whether their values align with the organization's.

Strategy 3-C

Anticipating future nursing shortages, Texas Health Resources established a program to grow and develop its own nurses. The youth prodigy program offers educational and employment opportunities to high school graduates interested in a nursing career. The program is designed to create a pathway for students interested in earning a bachelor's degree after acquiring an associate's degree in nursing and while working for Texas Health Resources. Additionally, the health system offers tuition reimbursement to employees from any discipline to pursue a career in nursing.

Strategy 3-D

As the largest segment of the workforce at Texas Health Resources, nurses have scheduling flexibility and options to supplement their income. Through the Texas Health Central Staffing Office pool, nurses have flexible scheduling options so they can work as little or as much as they like. Those who wish to supplement their income can also work extra shifts at other hospitals in the health system. To ensure

compliance with workforce fatigue guidelines and prevent burnout, the health system runs reports to monitor participation in the program.

Strategy 6

Texas Health Resources established a recognition program called “Applause!” Employees receive thank-you cards, financial awards and other recognition for excellent performance, length of service, retirement and more.

Strategy 7-A

Texas Health Resources offers an educational program that focuses on managing different generations. At the health system, generational awareness and education started with using a nationally recognized training program, Leading Across Generations, as a framework. Since 2011, education has evolved and now includes other courses designed for leaders and work teams to improve team interaction and dynamics. These courses also have been approved as continuing education units for nurses. Other learning and development opportunities are provided to the workforce through instructor-led, online and blended learning opportunities to meet different learning needs and styles.

Strategy 7-B

Texas Health Resources uses blogs and social networks like Facebook, Twitter, Pinterest and other portals to create and build community. For example, Yammer is a workplace-based application that encourages interaction and collaboration. Like Facebook, the application allows employees to create and view profiles. It supports file sharing and provides an opportunity for peer mentoring and knowledge exchange. At Texas Health Resources, Yammer has contributed to team dialogue, collaboration and efficiency.

Results

By providing nurses with flexible scheduling options and supplemental income opportunities, the health system reduced its reliance on nurse staffing agencies while maintaining appropriate staffing levels. Currently, there are 400 nurses in the central staffing pool. A similar concept is being piloted in other clinical areas of the health system, such as pharmacy.

Because of its robust social media presence, Texas Health Resources was able to hire a diverse workforce from a variety of online sources. For example, in the second quarter of 2013, 160 new hires were selected from the health system’s career site; 47 from search engines such as Google, Bing and Yahoo; 8 from social networks such as LinkedIn, Facebook, and Twitter; 20 from job boards such as Health Callings and Career Builder; and 10 from pay-per-click sites such as Indeed. Texas Health Resources continues to expand and grow its social media presence such as increasing LinkedIn memberships and “likes” on its Facebook page.

The use of social media platforms has contributed to an increase in employee engagement. Texas Health Resources generates quarterly reports on social media activity to monitor levels of employee engagement—from number of messages posted to number of private and group messages sent.

Managing the intergenerational workforce improved employee engagement and work team interactions. The 2013 employee survey had a 92 percent participation rate, well beyond the Press Ganey national average response rate of 60 percent to 65 percent. Because of this, Texas Health Resources is ranked in the 93rd percentile in system participation, which is in the top decile of the Press Ganey National Database.

Lessons Learned

Texas Health Resources leadership realized that creating a great work environment is not a destination but a journey. Continuous improvement and learning cycles are part of the health system's process in the journey to excellence. The health system learned that managing a generational diverse workforce requires effective translation of theory into practice as one size does not fit all.

Texas Health Resources also learned that the most critical part of managing the intergenerational workforce is through thoughtful and effective planning—strategy, approach and processes. This includes incorporating the unique “cultural blueprint” of each generation, which has different needs, wants and expectations, and recognizing such diversity dimensions as culture, professional experience, acculturation, immigrant experience and education that influence generational differences.

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Additional Examples of Intergenerational Management Strategies

Case Example 7

Strategy 2-E

Zingerman's, a family of eight businesses in the food industry, developed a fun and entertaining company manual that communicates corporate policy and rules.⁵⁹ The manual serves as a staff guide and uses humorous language and entertaining graphics and games to deliver the company's vision, organizational culture and employee expectations. Because of the manual's interactive nature, many employees of all ages use it as a resource and tool.

Case Example 8

Strategy 5

dunnhumbyUSA, a customer science company, holds a semiannual event called Innovation Friday.^{60, 61} The 27-hour event includes all of the company's 2,000-plus employees across the world, a generationally and ethnically diverse group. All employees are invited to come up with innovative ideas to improve customer experience, from improving internal processes to investigating new technology. In 2013, an Innovation Friday event had 800 participants who brainstormed 130 innovations, 80 of which were adopted.

Case Example 9

Strategy 10

White County Medical Center in Searcy, Arkansas, created training opportunities for older workers, regardless of their backgrounds, to learn new skills and gain experience in the health care field. Older workers were paired with younger associates who shared their technical knowledge and expertise. In return, older associates shared their professional experiences from many years of employment. Associates of all ages gained more respect for one another.

The Future Workforce

Over the next decade, many baby boomers, who are currently leading companies and managing different generations, will exit the workforce and utilize a large share of health care services as patients. After their departure, millennials will fill the majority of the labor gap, and some Gen Xers and even millennials will ascend to leadership roles. This inevitable shift in patient and workforce demographics will force hospitals and care systems to build an organizational culture that develops and nurtures willing and able employees to provide excellent patient care.

To help health care organizations meet the challenges ahead, this report provides a list of workforce management strategies to manage life in the gap. Building a strong generational foundation allows leaders to understand their organization's workforce profile and develop programs and policies to acquire and retain a generationally diverse staff. Establishing effective generational management practices helps leaders identify and leverage each generation's strengths and prevent possible conflicts among employees from different generations. Developing generational competence increases understanding and improves communication and generational sensitivity throughout the entire workforce.

These strategies are intended to jump-start intergenerational management practices in hospitals and care systems, but they may need to be augmented to be sufficient long term, particularly when the patient and workforce demographic shift occurs. New and innovative approaches and models of care will need to be implemented as values, beliefs and expectations in the workplace continue to change. Health care organizations must evolve with a changing workforce to meet and align with patient needs. Doing so may require rethinking organizational structure, rebuilding and redefining jobs and creating new ones.

Restructuring the organization

As Gen Xers and millennials rise to leadership roles, health care organizations may need to consider flattening their structure and removing departmental and management hierarchies. Gen Xers and millennials—future leaders and workforce—consider organizational hierarchies as barriers to creativity and innovation.

Rebuilding and redefining jobs for redesigned care models

Health care organizations may need to modify job requirements to cater to new and emerging roles. This includes adjusting competencies so that the workforce aligns with new population health needs. For example, some jobs will need to be redesigned as technology advances. As jobs are redefined, the workforce may transition and redeploy to different settings, roles and organizational structures.

Creating new jobs

Organizations can invent new roles to accommodate staff needs and meet work volume. For example, jobs that require one individual to perform today may require two individuals tomorrow, and vice versa. As more care is being delivered outside of such formal structures as acute care facilities, jobs will be performed in different settings and function differently.

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