

Project SILVER

2.1.2: StAP-Design

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Management summary

The following report details the Stakeholder Awareness Program (StAP) of the SILVER project by providing a series of organizational interventions (campaigns) designed to raise awareness about and lay the groundwork for intergenerational learning in the workplace. It is part of the EU-funded international SILVER Project, and is the second in a series of project reports regarding StAP.

The report is organized into five chapters, with the introduction providing an overview of the SILVER Project and StAP, and the reasons for and potential benefits of implementing IGL and other measures to manage the demographic change in the workplace. It also provides a brief description of the factors and issues that often make designing and implementing a StAP the necessary predecessor to IGL.

Chapter 2 takes the reader step by step through the general design of the StAP campaigns. It describes the application domains (2.1), general points that are necessary to be taken into account (2.2) as well as the phases of designing a StAP intervention (2.3). It describes the contents of the design process (the *what*).

Chapter 3 is a guide to the implementation of both the preparation for and the design of the StAP (the *how to*). The chapter is structured along the phases that were described in chapter 2. It explains the means of realizing the steps in the design process and provides examples of particular components of the StAP interventions. For instance, the contents of a level-of-awareness scan are provided in detail within the description of phase three (3.2). Additionally, the means for tailoring a StAP to a particular organization or circumstance is provided, as are numerous specific examples of StAP interventions (some of which are described in more detail in the appendices).

Chapter 4 provides the means for contextualizing a StAP campaign within certain countries and sectors. Using the SILVER Project partner countries and the sectors on which they focus, this chapter offers examples of country- and sector-specific stakeholders and of the conditions for, stimulators of and barriers to IGL that can exist within different cultures. Examples of in-depths assessments are also presented. This chapter is clearly based on the research of the SILVER project partners.

Finally, chapter 5 provides the conclusions that can be drawn from the preceding chapters and it also offers some insight into what will be done next regarding StAP within the SILVER Project. An appendix presents materials for the actors that should support the application (train-the-trainer materials).

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1 Introduction

This is the second in a series of reports focusing on the Stakeholder Awareness Program (StAP) within the larger context of the SILVER Project. SILVER is a Grundtvig project funded with the support of the European Commission that aims to address the effects of demographic changes throughout Europe by developing an inclusive approach to intergenerational learning (IGL) in the workplace, specifically amongst knowledge workers. It is coordinated by Inholland University of Applied Sciences in cooperation with Oulu University of Applied Sciences, Brandenburg University of Technology Cottbus, the South East European Research Center, the Academy of Economic Studies of Bucharest and the University of Strathclyde. This publication reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained here. The contents are based on the research and inputs of all partners in the project.

As explained in the previous StAP report (2.1.1), the latest trends in global demographic change project that the population is ageing (UN, 1999). With the ageing of the general population comes the ageing of the workforce and the various challenges that result from it, such as the need to keep older employees active in the workplace for longer and the need to effectively utilize their skills and knowledge. The SILVER team thus recognizes that now, more than ever, there is a need for proactive management of the demographic change in the workplace in order to meet these challenges. Intergenerational learning (IGL), the focus of the SILVER Project, is one integral component of this task. As generation diversity (both in regard to age and experience) increases in the workplace, new issues will arise with regard to learning and knowledge transfer amongst and between employees within an organization. With IGL, organizations can consciously design and manage learning processes in the workplace in order to “foster cooperation and promote attitudinal change” between members of different generations (Cummings et al., 2002, p. 93).

In order for IGL to be successful, an array of stakeholders must be aware of the issues involved and must actively participate in its promotion and implementation in the workplace. Oftentimes, however, one or more of these integral stakeholders lack an awareness of the need for IGL, the conditions for and barriers to IGL, and the benefits of its use. The development of the StAP is therefore one of the core tasks within the SILVER Project and is integral in laying the groundwork for introducing IGL in the workplace.

The first StAP report (2.1.1) compiled an inventory of the work currently being done to raise awareness about IGL in the various countries and sectors involved in this project. The current report will now provide a description of the general design of the StAP campaigns that will be tested throughout the course of this project as well as the design of their implementation processes. The final chapter, chapter four, will provide means for contextualizing these campaigns within specific cultures and sectors, using the partner countries as examples.

Like the first StAP report, this current report is intended to reach stakeholders both within and outside organizations who engage in or who would benefit from engaging in the management of the demographic change. It is meant to provide assistance and guidelines to those who would develop and implement StAP interventions, including government agencies (from the European level down to the regional level), consultants, universities, pressure groups (such as unions or employers' organizations), members of the various levels of management, staff managers (including human resources personnel), team leaders and knowledge workers.

2 General design of StAP

The following chapter will take you step by step through the general design of the StAP campaigns that will be tested throughout the course of this project, beginning with an explanation of the aimed results and benefits of StAP campaigns and the kinds of problems they are intended to overcome. The structure of this report follows the phases of designing a particular StAP portrayed below.

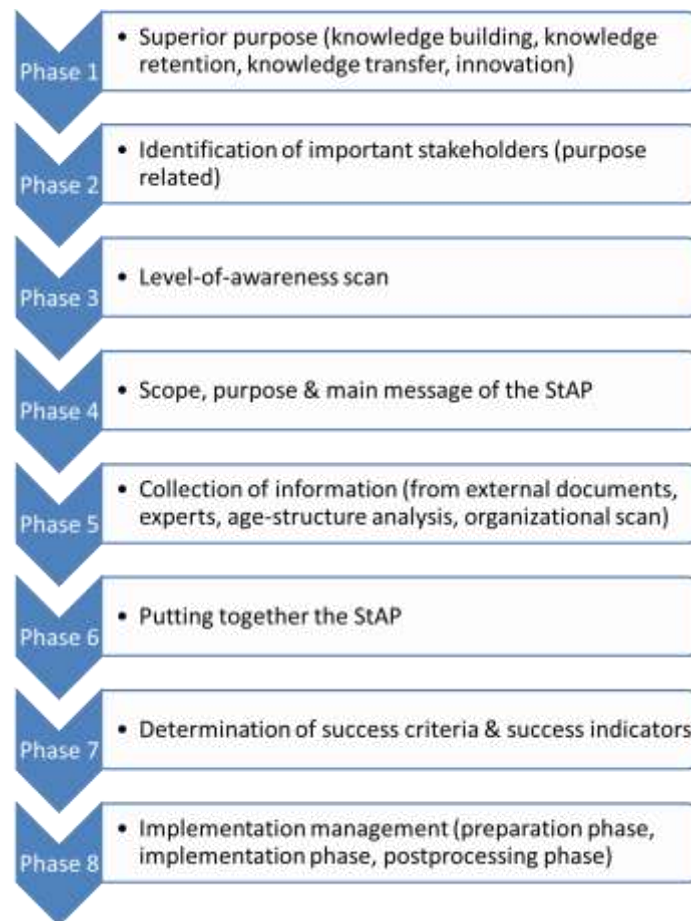


Figure 1: Phases of the StAP design

To apply a StAP intervention, it is necessary to differentiate between (i) the actor(s) and (ii) the target group(s). The actor is someone who is considering designing and implementing a StAP campaign in an organization. This initiator of the StAP may be someone from the organization itself (e.g., a manager or a HR manager) or from outside the organization (e.g., a researcher or someone from the SILVER project). The target group covers the stakeholders, who will be described later.

As someone who is considering designing and implementing a StAP campaign in an organization, you should first gain an understanding of the broad context in which it will operate. This will help to determine whether or not you will proceed with designing a StAP campaign and, if so, how the specific campaign will be developed and implemented (cf. Andriessen, 2004).

2.1 Application domain

By their nature, stakeholder awareness campaigns are designed to raise awareness on one or more levels, depending on the context in which they are implemented. As explained in the previous StAP report for the SILVER Project (2.1.1), there are four general levels of awareness that are important to the proactive treatment of demographic changes and, more specifically, to IGL measures in the workplace. It is important to reiterate these levels and to keep them in mind while considering the various proponents of the StAP campaigns proposed in this report. These levels are as follows:

1. General awareness about the fact that the work population is ageing.
2. Awareness about the consequences of the ageing population for organizations in general and for one's own organization.

3. Awareness about increasing diversity and its consequences in organizations in general and age-diversity in particular.

4. Awareness about the goals, benefits, conditions for and potential barriers of intergenerational learning with the aim of motivating the stakeholders to implement IGL.

The main intended goal of the following StAP campaigns is to reverse a lack of awareness on one or more of the above mentioned levels and to lay down the groundwork for the preparation, acceptance and implementation in the workplace of specific IGL measures and of measures to manage the demographic change on a broader level. Note, that the StAP is a diagnostic tool as well, as it provides information regarding what is going on in organizations. The StAP prepares the realization of effective IGL-measures in organizations.

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

While IGL and StAP can be applied to organizations of all sizes in various sectors, the SILVER Project focuses on organizations with at least thirty employees in sectors in which highly qualified workers are active. In general, the StAP campaigns described below can be applied to entire organizations. However, they can also be tailored to specific sections of an organization, such as those with a high amount of generation diversity. As will be explained further in chapter four, in order to be successful on a practical level, the design of these campaigns should be contextualized within the specific country, sector and organization in which they will be applied. Examples will be provided from each of the SILVER partner countries and the sectors on which they are focusing.

2.2 General points

In order for this whole process to be set in motion, there must be at least one person within the organization (i.e. the “actor”) who either recognizes a current issue or foresees a future issue that could be mitigated or avoided by implementing IGL. So, prior to beginning the StAP design process, those responsible for its design and implementation, the actors should have a firm understanding of the broad context in which they will be conducted (cf. Andriessen, 2004). Once the problem or problems that can be solved by IGL are identified, one should then consider the requirements of designing and implementing a StAP campaign within an organization. In terms of functional requirements, the outcomes and specific changes that are aimed to be achieved upon completion of the StAP campaign should be considered. The particular aims will play another role in the design of the StAP, as described below (see phase 1).

Before setting out on the design process, the limiting conditions for both the design and implementation of the campaign should be fully known. Both processes will require certain time and resource commitments in order to operate successfully. The resources and the time requirements depend on the particular StAP being designed. It is necessary to consider whether or not those who will be involved in a StAP campaign within the organization have sufficient time to do so, and whether or not the organization will be able to supply the necessary resources. Furthermore, the cooperation of the management and employees from all sections of the agency should be considered. The limiting conditions will be formalized in phase 8 of the StAP design.

In regard to operational requirements, it is essential that there is someone available who is fully aware of the benefits that IGL would bring to the organization and who understands the importance of raising awareness amongst all of the essential stakeholders (i.e. the actor). There also must be sufficient personnel at all levels within the organization, such as leaders, groups of employees or human resource managers, who are willing (or

can be motivated) and capable of applying the StAP intervention. If this is not the case within the organization, it may be better to look to outside consultants to assist in implementing the StAP campaign.

The development of the campaign goes hand in hand with a form of data collection that gathers information regarding the organization and the environment in which it operates. It may be useful to conduct tests, questionnaires, interviews, and focus group discussions (e.g., Bemmerlein-Lux, 2006). Of course, this could be another potentially limiting factor, as there must be the time and resources available to carry out this necessary data collection. Depending on the role of the initiator of the StAP within the organization and on the knowledge this actor already possesses, there are varying means of assessment (data collection) which range from the broadest, i.e. organizational scans, to in-depth analysis. There are various approaches between these two extremes on the continuum that depend on the soundness of, costs of and efforts required for the instruments being used.

There are, of course, advantages and disadvantages to each approach along the continuum. In terms of organizational scans, as indicated by Tosti and Jackson, “the goal of such a broad scan is not in-depth analysis, but comprehensive analysis” (1997, p. 24). In other words, an organizational scan tends to be quicker and of lower cost, but it provides only surface information, which may be adequate or not, as described below, depending on whether the necessary information is readily available (cf. e.g., Anderson, 1994). More in-depth analysis, on the other hand, provides more detailed, objective and valid results, but requires the utilization of measurement instruments that ideally were psychometrically developed, i.e. which are often difficult to design and time consuming to implement in a way that ensures the reliability of the information collected.

In our case, the StAP campaign designs were limited by the fact that they must operate within the time constraints of the two-year-long SILVER Project and that there has been a limited amount of research conducted regarding StAP in the field of IGL. Thus, this report will focus on the scanning process. The organizational scan approach, as it is presented in this report, is based on the approach of human performance improvement (HPI) (Tosti & Jackson, 1997). However, the scanning process may reveal where deeper information is necessary (ibid.), and thus it will result in the need to use more detailed assessment instruments for deeper diagnosis. Therefore, this report will also provide exemplary information about more detailed assessment instruments (see chapter 4).

When the cooperation of the management is clear and the resources mentioned above are given, it is easy to use the intervention presented in this report. Applicants from within the organization may be leaders, the human resource management, and also groups of employees at each level of the organization. How this may be done is presented in the following chapter.

2.3 Creating your own Stakeholder Awareness Program (StAP)

The following section will take you step by step through the actual StAP design process. Background information about the application is provided in chapter three, which follows the phases described here. Keep in mind that the development of the StAP will involve the participation of many individuals within the organization, and will require multiple interviews and interactions with managers and employees. Therefore, the development of the StAP itself serves to raise awareness within the organization on all levels.

Phase 1: The first step in the design process is to *define the superior purpose of your efforts*. As explained in section 2.2, in order for this process to begin, there must be at least one person in the organization (i.e. the “actor”) who recognizes the need to implement IGL in order to deal with a current or future problem. This person should work together with members of the organization to define the superior purpose of preparing for and implementing IGL. Such superior purposes may be broad aims of the general efforts of the actor, such as knowledge building, knowledge transfer, knowledge retention or innovation. The superior purpose may also be more specific, focusing on the preparation of doing IGL. In this report, we focus on the purpose of doing IGL.

Phase 2: The next step in the process is to *identify all of the stakeholders* who should be taken into account if an IGL measure would be implemented in the particular organization (i.e. the targets of your StAP campaign). A stakeholder can be defined as “any group or individual who can affect or is affected by the achievement of the organization’s objectives” (Freeman, 1984; as cited in Berg, 2005, p. 139; Skrzipek, 2005, p. 47; Wentges, 2002, p. 91). When identifying the stakeholders, it is important to be as specific as possible, naming them whenever possible. There are a number of stakeholders who are particularly important for IGL and who would thus be a target of a StAP campaign. They are as follows (cf. Naegele & Walker, 2006; Taylor, 2006):

- Organization-specific internal stakeholders, who may be part of the following groups: top management (including owners, directors, CEOs, CFOs, HR officers, etc.), staff managers (including HR personnel and trainers), middle management, team leaders and knowledge workers from all generations
- Organization-specific external stakeholders, such as customer groups, suppliers and cooperation partners, trade unions, employer and union confederations, national, regional and local governments, the new generation of managers (current students/future graduates), and thus educational institutions such as universities

The campaign should not focus on all possible stakeholders, but on the most important stakeholders. Their importance can be defined by their level of power, degree of concern regarding IGL and StAP measures, level of responsibility, etc. (cf. e.g., Gadenne et al., 2009). For innerorganizational StAP interventions, it is more likely that organization-specific stakeholders should be taken into account. Within this report, stakeholders are considered as the target groups of StAP, but they are also important supporters of StAP- as well as IGL-measures. When the StAP interventions are initiated or joined by actors from outside the organization, a kind of contract with the management seems necessary at the end of phase 2. Furthermore, the management should now introduce the actors to the members of the organization (particularly the identified stakeholders). For instance, a team meeting can be used here.

Phase 3: Once the stakeholders are identified, the next step then is to *determine the level of awareness that they already have*. Each stakeholder needs to be aware of the issues and important factors regarding demographic change and IGL. As explained in section 2.1, we differentiate between four levels of awareness in the SILVER Project. The process of determining the level of awareness the stakeholders already have (i.e., level-of-awareness scan) will be part of chapter 3. The levels of awareness include the following:

Level 1: General awareness about the fact that the work population is ageing. Stakeholders should be informed about the fact that major demographic changes are occurring in their own country and in other countries that are affecting the structure of populations and thus the workforce.

Level 2: Awareness about the consequences of the ageing population for organizations in general and for one’s own organization. Stakeholders need to have an understanding of the consequences that these demographic changes will have on the economy and on companies in general, and also the challenges that their own organization will face. Challenges include, but are not limited to, the ageing of the workforce (in the countries as well as in organizations), the need to provide further training to all age-groups, and the risk of knowledge loss.

Level 3. Awareness about increasing diversity and its consequences in organizations in general and age-diversity in particular. This level of awareness means that the various stakeholders are aware of the fact that age is an aspect that needs attention. One should also determine whether they are familiar with age-correlated features (are they conscious of age-related stereotypes that exist within and outside of their organization?) and whether they are alert to the needs of different generations, especially within their own organization.

Level 4. Awareness about the goals, benefits, conditions for and potential barriers of intergenerational learning with the aim of motivating the stakeholders to implement IGL. As indicated in the statement

above, there are multiple important aspects of the highest level of awareness. The StAP campaign will pave the way for the implementation of IGL in the work place, so it is important that stakeholders are aware of the wide range of **benefits** IGL could produce. The benefits of IGL are knowledge building, knowledge transfer, knowledge retention, innovation, as well as an improvement of social relations between generations. More detailed lists of benefits may be found in the literature (see especially Taylor, 2006, p. 65 ff.; and also Deller et al., 2008, p. 20-23; Frerichs & Sporket, 2007, p. 3-5; Juch, 2009).

Stakeholders should also have a firm awareness of the **process of starting an IGL project**, including the preparatory steps that are required (such as age-structure analysis), the process of implementation (project management, etc.), and evaluation, as will be presented in the SILVER Project report 3.1.1. When thinking about implementing IGL, it is important that one is also aware of the **conditions for and barriers to IGL**. Table 3 below provides an overview of such conditions and barriers at different levels within an organization, as can be found in the literature. The differentiation of levels under consideration is based on the PTO-Analysis of Strohm and Ulich (1998). Depending on the particular context, certain factors will become more important than others. The references column provides sources for where the role of the factors is explained in more detail.

Table 1: Conditions for and barriers to IGL

Level	Factors	References e.g.
Level of the organization	Organizational culture, learning climate in organizations, signaling of the management, worker participation & involvement, organizational structures, mental learning barriers at the level of the organization	Bruch et al. (2010); Buck et al. (2002); Deller et al. (2008); Fischer (2007); Gebert & Boerner (1997); Guldenberg (1997); Juch (2009); Kluge (1999); Oertel (2007); Sonntag (1997); Spannring (2008); Tannenbaum & Yukl (1992)
Level of organizational units & primary task	Learning potential in working task, organization of work, learning resources	Grignoli & Di Paolo (2008); Juch (2009); Maarit (2011); Maier & Rosenstiel (1997); Spannring (2008)
Interindividual level	Team culture, team roles, commitment, harmony, psychological safety, self-reflection, knowledge sharing, workload sharing, competences, team leader coaching, clear objectives, communication, the quality of inter-generational cooperation	Argote et al. (2001); Buck et al. (2002); Guldenberg (1997); Kluge (1999); Maier & Rosenstiel (1997); Tannenbaum & Yukl (1992); Wilkesmann (1999), Vos, Schamphelaere, & Bruystegem, (2011)
Individual level	Learning motivation, learning ability, self-efficacy, motivation to transfer own knowledge, ability to transfer own knowledge, age-stereotypes	Bruch et al. (2010); Buck et al. (2002); Dodgson (1993); Grignoli & Di Paolo (2008); Guldenberg (1997); Juch (2009); Kluge (1999); Maier & Rosenstiel (1997); Simons (2000); Spannring (2008); Tannenbaum & Yukl (1992)
Level of the environment	Cooperation with external partners who promote learning/ IGL, environmental dynamics, cultural dimensions	Dodgson (1993); Deller et al. (2008)

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

An example of a StAP measure that focused on raising the first and second levels of awareness was the New Quality of Work Initiative in Germany, which was funded by the German Federal Ministry of Labour and Social

Affairs. The initiative used numerous measures, such as networking interventions via online platforms and reporting best practice examples, to raise awareness about demographic change and its consequences for organizations. In the Netherlands, a generation workshop by Blik-opener focused on raising the third level of awareness amongst top-management, staff managers, middle management, team leaders and knowledge workers by providing both factual information and an experience around generations. The European Network for International Learning (ENIL) sought to raise the fourth and highest level of awareness by offering a platform and incentives for fostering new ideas and developments in IGL throughout Europe and by providing the infrastructure for the ongoing research and development of IGL. For a more detailed inventory of StAP measures in the partner countries, refer to report 2.1.1.

Phase 4b: It is now important to *ascertain and formulate the purpose of the StAP*. For example, the purpose of a StAP might be to build awareness amongst managers about the fact that the work population is ageing (level-1-awareness), about the resulting consequences of an ageing workforce for the company (level-2-awareness), about the needs of different generations within the organization and the need to pay attention to age-related aspects when making organizational decisions (level-3-awareness), or about the factors that support IGL in an organization (level-4-awareness). Based on the analysis conducted in phase 3, the initiators of the StAP should now also be able to define the main message or messages of the StAP.

Phase 5: The next step in the design process is to collect sufficient data so that you will be able to *provide the necessary contextual information for each level of awareness*. For the level-1-awareness, appropriate and reliable information to show that the population is ageing becomes necessary. For the level-2-awareness, reasons why the particular organization will be affected by this demographic change are important in terms of contextual information. For the level-3-awareness, arguments to support the idea that age is an important factor to pay attention to (e.g. age-related features and the needs of different generations) become necessary. And finally, for the level-4-awareness, one should collect the various stimulators and barriers to organizational learning and IGL, and a scan of the current state of the organization should be performed. Depending on whether or not the necessary information as described below is available and adequate, more formal assessments that go deeper and provide more reliable information may become necessary.

Phase 6: In phase 6, the *optimal kind of StAP campaign* should be *selected* based on the target group(s) (stakeholders), their level-of-awareness, the refined aims of the campaign and the results of the information collected in earlier steps (contents). As was discussed in report 2.1.1, there are multiple ways to classify StAPs. Aside from classifications regarding the aim (level-of-awareness), target group (stakeholders) and actors (applicants), another type of classification focuses on the kind of intervention that is used. Examples are listed below. They are not necessarily independent of each other and it is often appropriate and useful to combine them.

1. Provide factual information, including the results of research and best practices.
2. Provide an experience around generations and intergenerational learning.
3. Provide tools for making decisions on when and how to use IGL in organizations.
4. Provide scans and other tools to generate and analyze data about the need for IGL in organizations.
5. Provide training on how to do IGL.
6. Bring people together to discuss the goals, benefits, possibilities or potential barriers of intergenerational learning.

A further type of classification, which is based on Sayers (2006), focuses more on the message of the StAP and the means of communicating this message. Means of communication can include the following: mass communication, personal communication, education, public relations (PR) and advocacy/lobbying. Examples of particular StAP interventions will be provided later and are listed in report 2.1.1.

Phase 7: In phase 7, the success criteria for the StAP as well as their assessment have to be determined. Based on the intended and expected results, it is necessary to specify (i) at what point in the process they should be achieved, and (ii) what indicators might be used to measure them. It is important to specify this before the campaign is set into motion. One of the reasons for this is so that one can determine at the outset whether or not you need pre- and post- implementation measurements or if a post-measurement is sufficient.

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

Successes of a StAP campaign can be both quantitative and qualitative. Possible quantitative criteria include everything that one can count that may be an indicator of rising awareness amongst the target groups. Long-term, indirect quantitative indicators can include an increasing number of employees who apply or participate in a particular IGL or lifelong learning measure (behavior in terms of Kirkpatrick, 2000). Possible qualitative success criteria include various assessments of people who are able to judge changes of the level of awareness of the target groups (learning in terms of Kirkpatrick, 2000). Another example is the integration of generation-related issues on a company's website or in its mission statement (behavior in terms of Kirkpatrick, 2000), indicating an increased awareness within the company.

Phase 8: The eighth and final phase is planning the management of the implementation of the StAP. Some important things to be managed were already presented in chapter 2.2. More information will be provided in the following chapter. An very important part of this phase 8 is to link back to the general purpose (see phase 1) and thus, to prepare doing IGL. For more detailed information about StAP design in other areas other than IGL, see, for instance, Bemmerlein-Lux (2006), Mojik (2005), Sayers (2006); and for more information about the design of innerorganizational measures in other areas, see, for instance, Piskurich et al. (2000).

3 Means for implementation the design process

This chapter provides a guide to how the phases in the design of StAP may be realized. Thus, the following chapter describes the information collection phases as well as examples of StAP components. Here, we focus on the short-term organizational scan. In chapter 4, we also provide information about deepening measures (instruments) within country-specific contexts.

3.1 Phase 2: Identifying the stakeholders

To identify the important stakeholders, the management and those responsible for HRM should be requested to identify:

- Who are the persons, groups, or institutions within and outside the organization that should be involved (e.g. important partners, opinion leaders, those who make important decisions, those who are influential for management decisions) when it comes to measures to manage the demographic change in general or IGL in particular?

A culture- and sector-specific list of general stakeholders will be presented in chapter 4. The most important stakeholders or their representatives should be involved in the next phases of designing the StAP. The input of the stakeholders is necessary for the information collection phases (e.g. in terms of focus group sessions, interviews, or written questionnaires), but the stakeholders should also be involved for the design itself, whenever possible.

3.2 Phase 3: Determining the level of awareness

To analyze the level of awareness of stakeholders, a level-of-awareness scan should be implemented. Such a scan can be realized in multiple ways, including a focus group session (representatives of the identified stakeholders as well as a moderator come together and work out the contents in question), interviews with repre-

sentatives of the stakeholders, and questionnaires answered by the stakeholders. The information collection in phase 3 of the StAP design might be realized step by step through multiple contacts or in one session. The following table presents the contents of this scan; an illustration of this phase in terms of a questionnaire is provided in appendix 1.

Table 2: Level-of-awareness scan

Indicator for	Indicators & how to collect the info	How to make inferences from the info; with (+) indicating awareness and (-) indicating lack of awareness
level-1- awareness	<p>Flash-light question:</p> <ul style="list-style-type: none"> ▪ What are the most important challenges in your society for the next 10 years? 	<ul style="list-style-type: none"> <input type="checkbox"/> Categorize open answers <input type="checkbox"/> Is demographic change or something related (e.g., ageing of population) mentioned? (+)
level-1- awareness	<p>Ratings:</p> <ul style="list-style-type: none"> ▪ Please indicate the urgency of the following aspects for your society (on a 1 to 10 scale): <p>Increased international competition Ageing of the work force Globalization Shrinking of labor force Technological change Decrease in birth rates</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Is “ageing of the workforce” rated with 8 to 10 (+) or lower (-)? <input type="checkbox"/> Are the demographic-change-issues judged as being as important as the other issues (+) or consistently lower (-)?
level-2- awareness	<p>Open question (no indication of number of answers):</p> <ul style="list-style-type: none"> ▪ Think about demographic change. What are the particular consequences for your organization/ the organization under consideration? 	<ul style="list-style-type: none"> <input type="checkbox"/> Categorize open answers in terms of: ageing of staff, generation diversity, knowledge-loss/-transfer, personnel recruitment, further training issues; add more categories representing the answers <input type="checkbox"/> Count number of answers: Are a lot of consequences present? <input type="checkbox"/> Are ageing of staff and knowledge-loss/-transfer mentioned [both indicators for IGL-importance]? (+)
level-3- awareness	<p>Open question to be discussed:</p> <ul style="list-style-type: none"> ▪ Why do you think age is an aspect that needs attention for organizational decisions and processes? 	<ul style="list-style-type: none"> <input type="checkbox"/> Record the discussion/ issues in the discussion <input type="checkbox"/> Are age-related prejudices and stereotypes mentioned (-) or are generation-related needs mentioned (+)?
level-3- awareness	<p>Flash light questions:</p> <ul style="list-style-type: none"> ▪ Does your organization have information available about the current & prospective age structure within your organization as well as within particular parts of your organization? ▪ How often does your organization conduct age structure analysis? For whom are the results available? 	<ul style="list-style-type: none"> <input type="checkbox"/> Is the management/ HRM informed about the age structure of the organization (+)? <input type="checkbox"/> Is the age structure analysis available for the employees in the organization (+)? <input type="checkbox"/> Is the age structure analysis prospective-oriented (future scenarios) (+)?
level-4- awareness	<p>PROCESSES OF IGL:</p> <p>Prior to introduce questions related to level-4-awareness, a broad definition of IGL should be provided. The definition of IGL maintained by the SILVER</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Rating of adequacy of the subjective understanding of IGL (e.g., comprehensively understood, “generation”-aspect mentioned?) from not un-

	<p>project members is: “IGL is the process of knowledge building, innovation and knowledge transfer that takes place through lifelong learning among the different cohorts found in an organization”.</p> <p>Open questions (no indication of number of answers):</p> <ul style="list-style-type: none"> ▪ In your own words: What is IGL? ▪ Which IGL-measures do you know? Give a short description of each IGL-measure you know. 	<p>derstood (-) to fully understood (+)</p> <p><input type="checkbox"/> Classification of IGL-measures: Are stakeholders aware of a broad range of IGL-measures (+) or did they mention only 1 or 2 classes of IGL-measures (-)?</p>
level-4- awareness	<p>BENEFITS OF IGL:</p> <p>Open questions (no indication of number of answers):</p> <ul style="list-style-type: none"> ▪ What are the positive consequences of doing IGL for the organization? ▪ What are the benefits of doing IGL for employees/ groups of employees (e.g., older, younger)? ▪ What are the benefits of doing IGL for other parties (indicate beneficiaries too)? ▪ What are the negative consequences for your organization/ your group within the organization/ you of doing IGL? 	<p><input type="checkbox"/> Classify the answers for each question & each stakeholder group in terms of knowledge building, knowledge transfer, knowledge retention, innovation</p> <p><input type="checkbox"/> How many different benefits were mentioned?</p> <p><input type="checkbox"/> Are all important stakeholders as beneficiaries mentioned (+)?</p> <p><input type="checkbox"/> How many benefits are overlooked for each stakeholder group (-)?</p>
level-4- awareness	<p>FACTORS IMPORTANT FOR DOING IGL:</p> <p>Open questions (no indication of number of answers):</p> <ul style="list-style-type: none"> ▪ In your opinion, what are important conditions for doing IGL in your organization? ▪ In your opinion, what are supportive factors for doing IGL in your organization? ▪ In your opinion, what are barriers to doing IGL in your organization? 	<p><input type="checkbox"/> Classify the answers using the table in 2.3</p> <p><input type="checkbox"/> Is each influence-level represented (+)?</p> <p><input type="checkbox"/> Which factors are not well reflected as being influential (-)?</p>

3.3 Phase 4: Determine the scope and aim of the StAP

Based on the level-of-awareness scan, the awareness level of the stakeholders can be judged. This is the groundwork to formulate the particular aims of the StAP. Here, the wording of the stakeholders from this scan should be used where ever possible. From now on, the further implementation of preparation depends on the particular aims. The lowest level where awareness is lacking should always be focused on first, because the levels of awareness build on one another. Also, the implementation of preparation may differ depending on the particular stakeholder groups, because a good intervention requires target-group-specific tailoring. The particular aims and target groups should be documented.

3.4 Phase 5: Provision of necessary information

The next step then is the collection of information that is necessary to build each level of awareness for each stakeholder group. This process of information collection differs in terms of sources of information and readiness of materials. The results of this process form the basis for the particular StAP. An overview of important sources of information that are available regarding the targeted levels of awareness are provided in the following table.

Table 3: Sources of information necessary to build a particular StAP

Sources of information	Level of awareness				Readiness of materials
	1	2	3	4	
Public documents	x	x	x	x	high
Academic publications	x	x	x	x	high
Age-structure analysis in the organization		x			low
Needs and gap analysis in the organization		x			low
Experts			x	x	high
Experience reports				x	high
Questionnaires in the organizations			x	x	low
Focus group sessions				x	low
Deepening diagnostics (see Ch. 4)				x	low

For **level-1-awareness campaigns**, indicators regarding demographic change in the particular country as well as sector are required. Sources of information are e.g.: Reports and materials from the OECD, the EU, Federal governments, local governments, demography-specialized national and European research institutions, and project reports such as, for instance, the reports written for the SILVER project.

For **level-2-awareness campaigns**, indicators regarding the effects of demographic changes within the particular organization are required. Sources of information are again public and academic publications as well as the results of an age-structure analysis regarding the organization (as-is-state as well as prospective-oriented). Thus, it may be that an age-structure analysis becomes necessary. Furthermore, a scan of critical knowledge within the organization, combined with an age-analysis of the knowledgeable employees should be carried out, as has been realized by the Dutch company Thales (Needs and gap analysis, see StAP report 2.1.1). The results of such a prospective analysis are scenarios about the particular knowledge loss that would occur in the company if no intervention is conducted.

For **level-3-awareness campaigns**, indicators regarding (i) the benefits of consideration of age-related issues as well as (ii) the particular needs of particular generations (which are found in the organization) and (iii) real age-related changes compared to age-related prejudices are required. Sources of information are academic publications, experts, and maybe a short questionnaire within the organization to get a full picture of the prevalent prejudices.

For **level-4-awareness campaigns**, indicators regarding the **benefits** of IGL for this particular organization are required. Expert interviews, experience reports, and public and academic literature are adequate sources of information. For a broad reflection, the answers to the level-of-awareness scan (phase 3) should be re-analyzed: The representation of the full range of benefits of implementing IGL in organizations should be examined and benefits that were not mentioned should be added.

Furthermore, for **level-4-awareness campaigns**, indicators regarding the **as-is-state of the conditions, barriers, and stimulators for doing IGL** in this organization are required. This information becomes rather complex. Because of limited resources, we suggest to start here with an organizational scan within a focus group session with organization-internal representatives of different fields (for more information about the organizational scan procedures, see Tosti and Jackson, 1997). See table 4 below for an *example* of an organizational scan. Representatives are required as participants who know organizational issues, processes, procedures, attitudes etc. *The more knowledge the actor already has, the lesser contents need to be requested.* The organizational scan contains open questions and the evaluation of answers is very qualitative, as there are no clear evaluation rules. To support this judgment process, examples that underline the answers should be requested too. *This scanning is adaptable* and particular country- or sector-related issues may be added easily. The following table presents the guidelines for this scan, illustrating examples for each level of the organization (i.e., a complete

scan). It is also possible to focus this scan on one of the five levels of the organization, when it is clear that the factors of the other levels of the organization are already well characterized and fit to IGL.

Table 4: Broad organizational scan: Conditions and barriers for doing IGL

Indicator	Questions for focus groups; examples & descriptions should be requested																																										
General reflection	<p>What do you think: Which conditions for IGL are already present in this organization? Which barriers may be a problem?</p> <p><i>⌚ When the answers already give information about other factors of this table, just leave them out later.</i></p>																																										
Level of the Organization																																											
Organizational culture	<ul style="list-style-type: none"> What is dominating (indicate an answer in each row) in the organization: <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5</th> <th></th> </tr> </thead> <tbody> <tr> <td style="text-align: left;">atmosphere of control (-)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: right;">atmosphere of trust (+)</td> </tr> <tr> <td style="text-align: left;">hierarchical communication (-)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: right;">open communication culture (+)</td> </tr> <tr> <td style="text-align: left;">short-term goals (-)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: right;">long-term goals (+)</td> </tr> <tr> <td style="text-align: left;">authoritarian leadership-style (-)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: right;">participative leadership-style (+)</td> </tr> <tr> <td style="text-align: left;">no "corporate memory" available to employees (-)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: right;">efforts to provide a "corporate memory" to all employees (+)</td> </tr> </tbody> </table>		1	2	3	4	5		atmosphere of control (-)						atmosphere of trust (+)	hierarchical communication (-)						open communication culture (+)	short-term goals (-)						long-term goals (+)	authoritarian leadership-style (-)						participative leadership-style (+)	no "corporate memory" available to employees (-)						efforts to provide a "corporate memory" to all employees (+)
	1	2	3	4	5																																						
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no "corporate memory" available to employees (-)						efforts to provide a "corporate memory" to all employees (+)																																					
Learning climate	<ul style="list-style-type: none"> How is learning supported and valued within this organization (+) for each group, including age groups (+)? What resources does the organization provide to foster the learning of employees (e.g., learning time is not only private free time)? What are the rates of participation in formal learning for different age groups? How much codetermination do employees have when it comes to learning? 																																										
Signaling of the managers	<ul style="list-style-type: none"> Where in your organization is the topic of demographic change placed? How does the behavior of the managers promote strategies for knowledge-retention & -renewal? Are managers and leaders good role models for intergenerational issues as well as learning? Give examples of their behavior. 																																										
Worker participation & involvement	<ul style="list-style-type: none"> Describe the degree of employee-orientation in the organization. Do the superiors know the needs of the employees? From which sources? <p><i>(⌚ Regularly needs-assessments and status-quo assessments [+] vs. no efforts to get to know the particular needs [-])</i></p>																																										
Organizational structures that promote self-organization of workers, age-friendly culture	<ul style="list-style-type: none"> How are processes, projects, results, meetings, etc. documented in your organization? For whom is the documentation available? What are regular practices in the organization to exchange between members of different generations? Is this limited to exchanges on the same hierarchical level (-) or is there also exchange across hierarchies (+)? What IGL-related activities does your organization already employ in the workplace (e.g. mentoring, mixed-teams, job rotation)? Do you perceive differences in the leadership behavior, depending on those who are being lead (+)? 																																										

Level of organizational units & primary tasks	
Learning potential in working task	<ul style="list-style-type: none"> Describe 1 to 2 typical working task-cycles. (<i>① Completeness of primary task, degrees of freedom [+]</i>) How often do the employees have opportunities to utilize new skills? Which kind of skills?
Organization of work	<ul style="list-style-type: none"> Describe how your daily work is organized. (<i>① Project-based work, job rotation, tasks change [+] vs. stable tasks over long periods of time, high degree of formalization and bureaucracy [-]</i>) Tell me about the opportunities for cooperation and teamwork. How is cooperation stimulated in the company?
Limited learning resources (-)	<ul style="list-style-type: none"> What kind of issues do employees experience that may limit their learning activities? (Requesting particular learning resources)
Interindividual level (level of work team/ collective level)	
Team culture	<ul style="list-style-type: none"> Describe typical team norms. Are they easily adaptable? What is the proportion of employees who prefer competition rather than cooperation within the organization? How is diversity in teams managed and which role does diversity play?
Roles in teams	<ul style="list-style-type: none"> Think about typical roles in working teams. Describe the degree of what you would consider age-typical behavior.
Individual level	
Learning motivation & ability	<ul style="list-style-type: none"> What does learning mean for the employees? Are there any groups of employees who avoid learning (for whatever reasons)? What do you think would be the proportion of members of the organization who ... (i) are rather curious, (ii) fear change, (iii) act very goal-oriented, (iv) feel highly satisfied with their jobs? (Ask for examples) Would there be any group of employees who would need a particular training of learning abilities (learning how to learn)? Explain your opinion.
Self-efficacy	<ul style="list-style-type: none"> What are typical reasons the members of the organization provide for successes achieved? What are typical reasons the members of the organization provide for failures?
Motivation & ability to transfer own knowledge	<ul style="list-style-type: none"> In your opinion: what are reasons for members of your organization to avoid sharing their knowledge? (e.g., knowledge-is-power-attitude; lack of competencies to share & transfer knowledge [-])
Age-stereotypes	<ul style="list-style-type: none"> Describe a typical employee of this organization who is between 20 and 50/ 50+ years old. Give examples. (any age-related prejudices and indicators for stereotype-related behavior [-]?)
Level of the environment	
Cooperation with external partners who promote learning/ IGL	<ul style="list-style-type: none"> Describe the cooperation of the company with research institutions/ universities as well as other stakeholders outside the organization.
Dynamics in the environment	<ul style="list-style-type: none"> Describe the dynamics of the environment in which the organization acts.
Cultural dimensions	<ul style="list-style-type: none"> See SILVER report 2.1.1; country specific results may be reflected here

Note: A [+] indicates aspects that support IGL and a [-] indicates barriers to IGL. The symbols should not be presented to the focus group.

Alternatively to this focus group approach, interviews or questionnaires may be possible. Interviews and questionnaires may also be added for particular components of this information-collection process. An alternative approach to *scan the conditions and barriers at the interindividual level* is presented in the appendix 2. Furthermore, it may be necessary to implement a deepening analysis regarding a particular aspect (e.g., because

of a lack of information or because of overly diverse answers of the participants within the focus group). Some possibilities within each cultural context are presented in chapter 4.

3.5 Phase 6: Putting together the campaign

Based on this information, the aims of the StAP and the main message of the campaign should be refined again. This should be realized together with the management and all actors within this organization. Distributing the information collected here or providing opportunities for individuals to experience the aspects themselves are integral parts of the StAP. For the purposes of target group tailoring and instilling motivation for awareness building, the StAP will benefit from the (voluntary) integration and participation of the target groups in the next phases of its design. This means that the first communication measure may be integrated at this point. Members of the organization should be informed that information was collected and the results show the important next steps in the process of organizational development or change that now need to be prepared (together). For implementation, it seems important to show the members of the organization that something happens and that their involvement leads to (first) results (which are valued in the organization).

The decision for a particular kind of intervention depends on the aims of the intervention as well as the available resources. Because the particular StAP has to be tailored to the organization itself, and because of the multiple types of StAP campaigns available, it is not possible to infer the best StAP for each organization/ context here in this report. Instead, we hope to illuminate the multiple opportunities that are available. The following two tables (table 5 and table 6) show the various opportunities available, illustrated in the multiple combinations of a morphological box, as well as some examples for each level of awareness. An exemplary description of some of the possible StAP interventions can be found in appendices 3 to 4.

Table 5: Morphological box of the opportunities of tailored StAP campaigns

Dimensions	Characteristics of dimensions				
Aim (level of awareness)	1 (work population is ageing)	2 (consequences of the ageing population for org.)	3 (age-diversity, relevance of considering “age”)	4 (goals & conditions of doing IGL)	4 (conditions for & barriers to IGL)
Target group (stakeholders)	top management (including owners, directors, CEOs, CFOs, HR officers, etc.)	staff managers (including HR personnel and trainers)	middle management, team leaders	knowledge workers from all generations	organization-specific external stakeholders
Actors (StAP implementers)	SILVER-project-team/scientists	Manager of the organization	Staff management of the organization	External consultant	
Sayers’ communication strategies	Personal communication (targeted to stakeholders)	Mass media (broader communication)	Education (professional, structured training)	PR (targets towards a positive evaluation of the general efforts)	Lobbying/ advocacy
Available resources	time (+) staff (+) others (+)	time (-) staff (+) others (+)	time (+) staff (-) others (+)	time (-) staff (-) others (+)	time (-) staff (-) others (-)

Note: Based on this morphological box, a particular StAP is based on the combination of any characteristic of each row with any characteristics of the other rows.

Table 6: Exemplary StAP interventions

Level-of-awareness	Communication kind ¹	Examples ²
1	Mass media	Print and online materials may be distributed; information should become available
	Personal communication	When there are important stakeholders, opinion leaders, role models who are aware of the issue, it would be beneficial to find a way to cooperate with them. External cooperation may be beneficial: Are there experts who may be invited to talk about demographic change? Are there conferences where employees should be sent? Are there specialized consultants who could provide a workshop?
	Education	Send stakeholders to conferences, invite experts to give a workshop
	PR	TV segments with (i) expert talks, (ii) example organizations, (iii) comments from the public
	Advocacy/ lobbying	Organization internal “demographic experts” bring the topic to the employees in informal talks; Motivation of popular people (using individual networks) to talk about demographics and future scenarios (aim: to-open-eyes); Lobbying politicians: Information packages with examples from the organization to politicians, maybe meeting them and motivating them to make the topic of demographic change visible; Cooperate with valued partners (e.g., community centers, but also sector-leaders, sector-Gazelles), e.g. by means of regular discussion rounds with representatives of the organization as participants; Support other campaigns with the topic of demographic change, e.g., large-scale commercial campaigns of national institutions (“bill-boarding”)
2	Mass media	Intranet, brochures, newsletter etc. inform about the projections of generation-related developments (“our company now and in the future” with worst case and best case scenarios with and without proactive management of demographic changes) in the organization; Online questionnaire or game that every employee is required to do (focus = get employees thinking about the topic); Articles in company newsletters
	Personal communication	“Generations in our organization” forums are started to discuss generational needs (generations within this organization); Meetings with discussions, with free social grouping and reflection of this social grouping; Mini-workshop series (focus = activation) regarding diverse topics from demographic changes (with or without external experts), their influences on the organization and proactive management of these challenges;

		Meetings with the topic “our knowledge workers: their and our future in the company”
	Education	
	PR	Call for an organization-internal competition “generations in our organizations”, based on the results of information collection, with the task of illustrating the topic of generations in this organization creatively; awarding of the winners in and outside the organization; Competition between companies: “scenarios for our company in times of demographic change”, with diverse competition contributions possible (e.g., poems, comics, videos, skits, songs, texts, ...), reported in local media
	Advocacy/ lobbying	Managers of the organization highlight the demographic challenges of this organization as an important and present topic
3	Mass media	Posters, brochures etc. inform about real age-related changes as well as about age-related stereotypes; Intranet, brochures, newsletter etc. profile different employees as representatives of different generations in this organization (their experiences, expectations, fears, hopes, ...)
	Personal communication	Workshops to reduce age-related prejudices and to sensitize employees to generation-related needs; consulting of employees who have the authority to make decisions; Social events: “Generation days” (with food, games, experiences, music, expectations regarding particular generations within the organization)
	Education	Further training of HRM as “demography managers”
	PR	
	Advocacy/ lobbying	Valued members of the organization who are already sensitized motivate other members of the organization to reflect on their stereotypes and reduce them; Valued (public or organization-internal) representatives of different generations make their needs and expectations visible and explicit, by means of e.g. organization-internal bill-boarding
4	Mass media	Brochures about the benefits of IGL, tailored for different sub-groups within the organization (benefits for the organization, benefits for the 50+-generation, benefits for the newcomers, ...); informational campaigns that make clear which barriers impede IGL and which conditions support IGL; Creating a blog on company’s webpage with a weekly topic from the field of demographic change and IGL with employees as the contributors
	Personal communication	Consultancies provide support for a change process that might be necessary; trainings that relate to the aspects requested (e.g., communication, team roles, etc.);

	Workshop series in which project groups work out concepts about “intergenerational coexistence/ knowledge transfer: ideas of realization”
Education	<p>Study trips to organizations who have already implemented IGL successfully;</p> <p>Bring guest speakers/ experts into the organization (focus = learning);</p> <p>Having a workshop series in the organization (focus = learning) over a longer period of time (weekly or biweekly);</p> <p>Provide incentives for employees to attend outside lectures/ evening classes (money, honor, “points”, special trips/ excursions, promotions)</p>
PR	<p>Competition between different teams within the organization to achieve a certain status which is supportive for IGL;</p> <p>Call for an organization-internal competition “How can we become a learning organization”, “How and what can we learn from each other?”, to be creatively realized (e.g., comic strips) to get employees of different generations to work together</p>
Advocacy/ lobbying	Nomination of one or more “ambassadors for IGL” in the organization (with specific responsibilities and authorities)
Broad	<p>A combination of communication categories may result in a broader campaign or project; e.g.:</p> <p>Organization cooperates with a Journalist; Journalist visits the organization and supports an inner-organizational survey about “fears and hopes in the face of demographic changes”; the results (after the organization accepted the publication) will be published (i) in an article for the general public, (ii) inside the organization by means of a “thank you for your participation” document, (iii) another research Journalist accompanies this process and writes a regular progress report (with this organization being one of multiple cases), which will be published later in a specialist Journal</p>

¹ classification based on Sayers (2006)

² based on a workshop of the BTU group of the SILVER project

3.6 Phase 7: Determine success criteria

Before the StAP begins, expected outcomes have to be defined and the evaluation procedure has to be specified. To realize this, short-term and long-term as well as qualitative and quantitative indicators for “success”, focusing on reactions to the StAP, learning, behaviors, or organizational results (see Kirkpatrick, 2000), should be defined. A questionnaire or other measurement methods to judge the amount of the indicators need to be developed and an evaluation-timeline becomes necessary (e.g., pre-post, only post, pre-post-follow-up). The outcome definitions and evaluation should integrate indicators of awareness at the particular levels of interest.

3.7 Phase 8: Implementation management

Implementation management encompasses phase 8 of the design of StAP (see ch. 2.3). The implementation management comprises the preparatory phase, the implementation phase, and the post-processing phase of the StAP, which seems to some extent comparable with the implementation management of other processes of organizational development and change (see e.g., Dublin, 2000).

Table 7: Tasks of implementation management

Phase	Implementation management tasks
Preparation phase	<ul style="list-style-type: none"> ▪ Resource planning, including preliminary resources, roles and responsibilities, time-scheduling; in accordance with each party who will be concerned with the StAP ▪ Editing a list of values, incentives for the stakeholders who were defined to be the target group ▪ Communication of the StAP to target group(s) & of the cooperation of the management
Implementation of StAP	<ul style="list-style-type: none"> ▪ Valuing participation; it should be made sure that no negative consequences of engagement in the StAP occur (e.g., participation in the regular working time with an increase of pressure regarding regular tasks) ▪ Building on experiences of participants and the organizational reality ▪ see “mechanism” in SILVER-report 2.1.1
Postprocessing phase	<ul style="list-style-type: none"> ▪ Discussion of the process and results with the Stakeholders ▪ Feedback of results to members of the organization ▪ Provision of support to utilize the knowledge/ new skills (e.g., provide opportunities for intergenerational contacts) ▪ Linking back the process and results to the general purpose of the engagement (see phase 1) & starting to prepare the doing IGL part as the following step
General	<ul style="list-style-type: none"> ▪ Documentation of each step

4 Contextualization

While the previous sections went step by step through the general designs of the StAP interventions and implementation strategies that will be tested throughout this project, this next section will provide the means for their contextualization within specific cultures and sectors. The following subsection (6.1) lays out some of the known stakeholders for each of the partner countries and sectors under examination, thus giving a clearer focus of whom these interventions are designed to reach. The subsections that follow then provide a non-exhaustive overview of some of the main conditions, stimulators and barriers to IGL, as well as some examples of instruments to measure those contexts that exist within the partner countries and the sectors in question. *The following content is based on the desk research of each partner within the SILVER project.*

4.1 Country-specific and sector-specific stakeholders

The chart below provides an overview of some generally important stakeholders within the six partner countries and those that are specific to the sectors being considered within the partner countries. Further stakeholders will emerge for each particular organization (e.g., partners, customer groups, investors).

Table 8: Contextualization of Stakeholders

Country-Specific Stakeholders	Sector-Specific Stakeholders
FINLAND/ ICT	
<ul style="list-style-type: none"> ▪ Ministry of Employment and the Economy 	<ul style="list-style-type: none"> ▪ Customers/ End-users ▪ Investors ▪ Leaders/employees of Nokia and Rovio, e.g., Board of Directors for Nokia, especially Stephen Elop (current CEO) and Jorma Ollila (former CEO), Peter Westerbacka of Rovio, and Linus Thorvalds, the original author and programmer of the Linux operating system
GERMANY/ SERVICE SECTOR	
<ul style="list-style-type: none"> ▪ BDA (Federal Employers' Association) ▪ Federal Ministry of Economics and Technology (BMWi), Federal Ministry of Education and Research (BMBF), governments of the Länder ▪ German research institutions with policy consulting functions and with some focus on demographics or KIS, e.g. Institute for Economic Research (ifo), Max Planck Institute for Demographic Research (MPIDR), Federal Institute for Population Research (BiB), Berlin Institute for Population and Development, Federal Institute for Vocational Education and Training (BIBB) 	<ul style="list-style-type: none"> ▪ BDU (Professional Association of German Corporate Consultants) ▪ BDWi (Federal Association of the Services Industry) ▪ Trade unions, e.g. ver.di ▪ Cooperation partners of KIBS (because KIBS organizations are characterized by high levels of cooperation, see e.g., Strambach, 2008)
GREECE/ Human Health and Social Work Sector	
<ul style="list-style-type: none"> ▪ Ministry of Education, Lifelong Learning and Religious Affairs ▪ Ministry of Labour and Social Security 	<ul style="list-style-type: none"> ▪ The Panhellenic Federation of Employees of Public Hospitals ▪ Medical doctors, nurses and administration staff
THE NETHERLANDS/ SERVICE SECTOR	
<ul style="list-style-type: none"> ▪ Ministry of Economic Affairs, Agriculture and Innovation ▪ Ministry of Education, Culture and Science ▪ Ministry of Social Affairs and Employment 	<ul style="list-style-type: none"> ▪ For Banking: customers, shareholders, investors, employees' vendors, fellow banks, the Dutch Banking Association (NVB); De Nederlandsche Bank (DNB), the Financial Markets Authority (AFM); the credit rating agencies Moody's, Fitch and S & P, and the government (ABN/AMRO is now owned by the Dutch government) ▪ For Accounting: "Nederlands Beroepsorganisatie van Accountants" (NBA), the NBA Young Professionals, the "Vereniging Nederlands Instituut voor Register Valuators (NIRV), the "Institute van Internal Auditors"(IIA), the "Vereniging voor Financieel-Economisch Management" (FINEM) and the "SRA-Accountantskantoren" (network) ▪ For Management Consultancy: The Raad van organisatieadviesbureaus (Council of Management Consulting Firms) and the Orde van Organisatie Adviseurs (Association of Management Consultants)
ROMANIA/ Higher Education Sector	
<ul style="list-style-type: none"> ▪ Lifelong Learning Institute „Alexandru I. Cuza”, 	<ul style="list-style-type: none"> ▪ Universities

<ul style="list-style-type: none"> University of Iasi (www.iec.psih.uaic.ro) ▪ Romanian Institute for Adult Education (IREA) ▪ Ministry of Economy, Trade and the Business Environment ▪ Ministry of Education ▪ Parliamentary Commissions for Education ▪ National Council for Financing HE 	<ul style="list-style-type: none"> ▪ Professors, researchers ▪ Students
SCOTLAND/ Tourism/ Health/ SMEs	
<ul style="list-style-type: none"> ▪ Cabinet Secretary for Finance, Employment and Sustainable Growth 	<ul style="list-style-type: none"> ▪ Tourism: VisitBritain, Visit Scotland, Institute of Travel and Tourism (ITT), Association of British travel Agents (ABTA), Scottish Tourist Guides Association, People 1st (Sector Skills Council for tourism) The Tourism Society ▪ Health: Skills for Health (Sector Skills Council for health), British Medical Association (BMA), NHS, Nursing & Midwifery Council (NMC), Royal College of Nurses (RCN) Department of Health (DH)

4.2 Conditions, stimulators and barriers

The next subsections will present some indicators from the partner countries regarding the conditions for, stimulators of and barriers to IGL, which were part of the organizational scan and which build the basis for StAP (level-4-awareness). Furthermore, some exemplary instruments will be highlighted that enable a deeper exploration of some of the factors when the organizational scan does not result in satisfactory results. This will not be a complete review but an exemplary illustration of characteristics as well as the importance of the factors.

4.2.1 Level of awareness

The prevalent level of awareness seems to vary amongst the partner countries. It is important to consider such characteristics, as they provide the background of particular StAPs in particular organizations. The governments of various countries put demographic change on their agenda and took several measures to manage it. For instance, in 2001, the Dutch government installed the “Taskforce on Older People and Employment”, and, in 2005, the coordinating group “Grey Works.” These initiatives were mainly focused on creating awareness by giving lectures, calling work committees, advertising, and informing the media on topics aimed at improving the employment prospects of older adults (Conen et al., 2010). In Germany, as another example, the government realized some information campaigns, but, unlike Finland, Germany has no uniform, centrally-coordinated strategy (e.g., Bruch et al., 2010; Frerichs & Sporket, 2007). In Finland, the topic of demographic change is very present and, based on the amount of TV and newspaper articles that focus on this issue, people should be well informed.

The German public discussion of the topic focusses on the shrinking labor force. The ageing of the workforce within organizations is not as prevalent (Buck et al., 2002). In contrast to this, the main concern of managers from the Romanian business environment seems to be the fact that the workers from the Babyboomer generation will retire within ten years and that the companies will face a massive loss of knowledge (Ionescu, 2012; Manpower, 2012; Oancea, Raduta, 2009). In the UK, IGL within the workplace happens only sporadically, indicating a particular lack of level-four-awareness. In Greece, the situation seems somewhat different, with a lack of age-friendly structures and a lack of awareness of the value of the knowledge of older workers.

To summarize, the general level of awareness seems to differ between countries, depending on political activities, the uniformity of efforts (e.g., the central coordination of efforts), social and political structures, and the provision of information and support for implementing IGL in organizations.

4.2.2 Factors at organizational level

There are many factors at the level of the organization that will have an effect on the type of StAP used and the means of implementation in a certain country or sector. These include, but are not limited to, organizational culture, signaling of the management and age-friendly structures.

Organizational culture should be taken into account as a very important background factor of doing IGL in organizations. It includes collective beliefs and attitudes with normative power for the individual in the organiza-

tion (see e.g., Bratianu & Orzea, 2010a, p. 46; Bruch et al., 2010, p. 232; Spannring, 2008). One component of organizational culture that is important for doing IGL is flexibility and the ability to change. A research project in Greece resulted in a description of the public sector that included the following aspects: It focuses on secure prospects through a strict hierarchy system, changes take place very slowly, and the working environment does not promote flexibility (Makridis, 2011). The results for the private sector differed greatly. This indicates that contextual factors for IGL in the Greek health sector may depend on the affiliation of the organization with the public or the private arena. A different example is the Finish ICT sector. Having the pace of technological innovations as well as the example of the organizational changes of Nokia in mind, it is likely that the Finish ICT sector requires organizations that are open and able to change. Openness to change, capacity to change, and flexibility are all supportive factors of doing IGL in organizations.

When age-friendly or age-related organizational structures are taken into account, the sectors under consideration seem to become important. For instance, the higher education sector in Romania and the healthcare sector in Greece are characterized by hierarchies that are largely structured by age. The employees from the lower levels of the hierarchy very often have the chance or are required to work alongside the employees from the higher levels of the hierarchy. The sectors are largely based on a top-down knowledge exchange that is defined by the tenure and experience of an employee. Mentoring and mixed-age teams are prevalent practices, but the learning is largely realized as a one-way-process with the experienced/ older employees being the teachers and mentors and the less experienced/ younger employees being the learners and mentees. In contrast to this, the ICT sector in Finland is a very young sector with less generational diversity and less associations between expertise level and age. Thus, intergenerational exchange is not as much institutionalized as in the sectors mentioned above.

There are country-specific instruments to measure different factors at the organizational level and to deepen the information gained from the first organizational scan. For instance, to find out more about organizational culture, the Romanian E.C.O System (Ticu, 2008) offers assessment batteries that can be easily fulfilled by the employees. It results in a more objective and comprehensive reflection of leadership style, organizational equity, organizational learning, and other factors. Measures focused on the learning climate in organizations are, e.g., the learning climate checklist of Sonntag (e.g., 1997) (Germany) or the top performance questionnaire of Nelson and Burns (1986) (The Netherlands). While the Dutch instrument classifies the organizational learning climate as being reactive, active, proactive or delivering top performance, the German checklist differentiates between indicators for the organizational learning surface, employer's participation in the learning process, the learning potentials within work, and others. When it comes to age-friendly organizational structures and culture, Sanchez & Mariano (2009) presented a triangulation approach to evaluate intergenerational projects (UK). When it comes to mental learning barriers at the organizational level, the dissertation of Hopf (2010) presents a German instrument.

4.2.3 Factors at the level of organizational units & primary tasks

At the level of organizational units, one should look at factors such as the organization of work and should consider whether or not the sector or organization already offers project-based work, job rotation or other opportunities for cooperation and teamwork. This is important for doing IGL, as the kind of primary task and organization of working on this primary task largely influence the practice and opportunities for cooperation, knowledge exchange and intergenerational exchange (e.g., Juch, 2009; Spannring, 2008).

Here, the country as well as the sector seem to be important. For instance, while Germany ranked very low in terms of institutional collectivism in a survey conducted as part of the GLOBE Project (Brodbeck, et al. 2002, p. 18), project-based work is prevalent in KIS/KIBS organizations in Germany and in general (Strambach, 2008, pp. 156, 165). This type of organization of work requires teamwork and cooperation in changing teams (Strambach, 2008, pp. 156, 165) and would better prepare workers for understanding the benefits of IGL and for the cooperation and interaction it requires. This kind of project-based work is the same in the ICT sector in Finland. On the other hand, some sectors are organized more in terms of bureaucracy, and cooperation is structured in a different way. In the healthcare sector (Greece), medical professionals are often required to work in multidisciplinary teams in order to properly diagnose, treat or prevent disease, and older, more experienced professionals are often required to tutor younger, less experienced individuals in order to guarantee proper treatment of patients. Different to the KIS sector and the ICT sector, the knowledge flow here is largely one-way oriented. In terms of the organization of working on the primary task, the higher education sector (Romania) seems to be somewhat between the cases mentioned above: On the one hand, the sector is characterized by

bureaucracy as well as a one-way knowledge flow; on the other hand, publicly funded projects are project-based work.

Another factor at the level of organizational units and primary tasks is the management of learning resources. Here, one important aspect is financial resources. For instance, companies in the UK are either in 'survivability mode' or 'forward thinking survived mode'. Companies in the former will be less eager to implement interventions without clear time/cost benefits. They will be more risk adverse. Other limitations of learning resources are stress and lack of time or lack of degrees of freedom in time management. A high level of stress and a lack of time are features commonly associated with work within ICT (Finland). Thus, the learning resources within the sector under consideration may require specific interventions (for doing IGL) and specific reflections (for becoming aware in the StAP).

As seen before at the organizational level, here, too, country-specific instruments can deepen the organizational scan. For instance, the "Knowledge Performance Scan" of Ropes and Stam (2008), a Dutch assessment, deepens the insights of the organization of the work in relation to knowledge management (as the working processes of developing, storing and sharing knowledge). The assessment can be filled in quickly and it works best at the level of organizational units. The Greek version of the "Attitudes towards Organizational Change" assessment of Vakola and Nikolaou (2006) provides deepening information regarding resources and communication as well as potential sources of stress in the organization of the daily work. The 34-item questionnaire can be filled in very easily too.

4.2.4 Factors at the group level

When considering the interindividual level within a sector or a specific organization, one must look at the team culture that exists. For instance, a study undertaken in Romania by Bratianu and Oreza (2010b) found that a lack of trust amongst coworkers (perhaps related to the background of the country and the socialist regime that once promoted fear and control in the workplace) led to a reluctance to share knowledge. Knowledge transfer is essential to IGL in the workplace, and thus this lack of trust and reluctance could serve as an impediment to the implementation of IGL in the workplace. Another aspect at the group level is the occurrence of typical roles in teams. They may be very specific for particular working groups, but they also may vary depending on country and sector.

Taking into account the power differentials, the ICT sector (Finland) is somewhat unique. Due to the dynamic nature of the work, age is not necessarily the factor that determines one's position within the organization. For instance, younger employees sometimes possess knowledge or skills that older employees do not and are they are oftentimes more likely to adopt new technologies in the workplace. Furthermore, it is not unusual for younger workers to hold managerial positions within ICT companies in Finland. This differs greatly from the situation in the health sector in Greece as well as in the higher education sector in Romania, which were described above. In both sectors, power differentials are mainly age-dependent. Older employees are largely responsible for decision and policy making, primarily due to their vast experience.

To deepen the results of the organizational scan, country specific instruments are available. For instance, the "Group learning climate: team efficacy and psychological safety" assessment of Edmonson (1999) is a very quick, English-language assessment used in the Netherlands. The "Team Learning Orientation" questionnaire of Bunderson and Sutcliffe (2003) is another example of an English-language assessment utilized in the Netherlands, which may provide useful information in other countries too.

4.2.5 Factors at the individual level

Some factors to be considered at the individual level include learning motivation (e.g. attitudes towards learning) and the ability and motivation to transfer or share one's own knowledge with others. As mentioned in the subsection above, a general lack of trust amongst coworkers in Romania leads to a reluctance to share knowledge (Bratianu and Oreza, 2010b) and might serve as a barrier to involving employees in IGL. Indications for a "country-specific learning motivation" come from the general importance of learning (of different generations). In the Netherlands, 42 percent of workers and 30 percent of older workers participate in formal and informal learning activities (CPB 2009; MvSZ 2009). In countries like Sweden, Finland and Denmark, employers and employees pay much more attention to retaining the knowledge and skills of (older) workers. Twice as many elderly people in those countries are involved in training. In addition, very few organizations in the Netherlands have a personnel policy explicitly aimed at increasing the productivity of older people (CPB 2009; MvSZ 2009). In Germany, the participation of older employees (+ 50 years) in education and training is significantly

lower when compared to younger and middle-aged employees (e.g., Buck, et al., 2002; Kay, et al., 2008; Verworn & Hipp, 2009).

Another example of a potential barrier or stimulator at the individual level is stereotypes related to age. Negative stereotypes especially lead to the discrimination of older employees in multiple ways. Whether the stereotypes are positive or negative could determine their effect on the implementation of IGL in the workplace. For instance, in Romania, a survey regarding the degrees of discrimination resulted in 46% of the interviewed persons declaring that elders are discriminated or very discriminated against in Romania (Insomar, 2009). Therefore, a degree of discrimination in regard to age still exists in Romania, together with the usual preconceptions regarding age (e.g., a person grows older and loses their learning and mental capacities) (Insomar, 2009). These stereotypes could be an impediment to IGL in the workplace and should be taken into consideration when planning a StAP.

The situation in Scotland differs in that negative stereotypes towards older people have been decreasing and an appreciation of positive associations, such as reliability, a strong work ethic and loyalty, and the perception of older workers as an important organizational resource has been on the rise (Chartered Institute of Personnel and Development, 2010). However, many negative stereotypes about older workers still remain. Common perceptions include that they are less productive than younger workers, and that they are slower, less adaptable to technological changes, resistant to management and prone to ill health (Chartered Institute of Personnel and Development, 2010).

To deepen the organizational scan at the individual level, a lot of country-specific instruments exist. For instance, there is the “Worker orientation checklist” (Finland, available online at <http://www1.vaasa.fi/henkilostopalvelut/julkaisut/pdf/perehdyttamisopas.pdf>), the “Critical Reflective Work behaviour” assessment (The Netherlands; Van Woerkom, Nijhof, & Nieuwenhuis, 2002), the “Job Satisfaction in the Health Care Sector” instrument (Greece; Charalabidou, 1996), or the “Skala berufliche Selbstwirksamkeit” (Germany; Schyns, & von Collani, 2010).

4.2.6 Factors in the environment

The environmental-level factors that build the context of doing IGL that have to be taken into account when designing a StAP were already part of the SILVER report 2.1.1. For instance, the dynamics in the environment, the degree of competitiveness, and the cultural dimensions provide the context for IGL and should be reflected upon for designing a StAP.

Factors in the environment, as well as factors at all other levels mentioned above, can be explored via the organizational scan described in chapter 4 and can be deepened via particular instruments available in each country, but they also can be explored using a comprehensive measurement. Such broad, comprehensive measurements require more time. Sometimes they need to become an integral part of an organizational change process, but they provide deep, clear knowledge about the context within an organization. Sometimes such comprehensive measurements are already related to the topic of age management (e.g., the Finnish “IKÄ-avain”, a survey-based programme), and sometimes they are not related to such a particular topic but may be adopted (e.g., the German MTO-Analysis of Strohm & Ulich, 1998). We will not go deeper into this idea here, but this needed to be mentioned. It should have become clear in chapter 4 that it is possible to deepen the knowledge regarding any particular factor with some extra efforts, taking into account the country and the sector of the organization under consideration.

5 Conclusion

As Europe continues to experience demographic change and deal with the realities of an ageing population, IGL and other measures to manage the demographic change are becoming increasingly important in both social and professional settings. In order to successfully implement these tools in the workplace, however, there must be a certain level of knowledge and understanding of the need for and the benefits of their use amongst important stakeholders. Unfortunately, this knowledge is often lacking on one or more essential levels.

This report was intended to provide a detailed guide to the preparation, design and implementation of a stakeholder awareness program within an organization. Because successful StAP campaigns need to be tailored, a report can only illustrate frameworks, which have to be concretely organized in the individual case. With the phases provided above, you should have all the heuristics necessary to prepare for and implement an appropriate and purposeful StAP campaign in your organization and to pave the way for the use of IGL in the work-

place. Some concrete tools of scanning (Appendix 1-2) and campaigning (Appendix 3-5) are finally added in the appendix, closing this report with a StAP checklist.

The project partners will use the information in this report as a jumping off point for the continuation of the stakeholder awareness program within the larger framework of the SILVER Project. In the coming year, some or all of the campaigns discussed within this report will be tested within the various contexts of the partner countries and sectors and will be evaluated with the ultimate goal of creating a handbook for effectively implementing StAP campaigns.

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7 Further materials linked to the contents of this report

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

The materials are:

- StAP tool 1: Level-of-awareness scan (phase 3)
- StAP tool 2: Broad organizational scan of the interindividual level of the organization (phase 5)
- StAP tool 3: Level-3 workshop to reduce prevalent age-stereotypes (exemplary StAP campaign)
- StAP tool 4: Level-4 inner-organizational competition (exemplary StAP campaign)


APPENDIX

The appendix presents materials for the actors. The materials will support the application of the StAP design. Because there exists no exclusive class of StAP interventions, the materials are *exemplary illustrations*.

- App. 1 Level-of-awareness scan (phase 3)
- App. 2 Broad organizational scan of the interindividual level of the organization: Questionnaire (phase 5)
- App. 3 Level-3 workshop to reduce prevalent age-stereotypes (exemplary illustration)
- App. 4 Level-4 inner-organizational competition (exemplary illustration)


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

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

	<p>Level-of-awareness scan: Please answer the following questions. Answer as honest as possible. When there is no indication of number of answers, write down as much answers as come to your mind.</p>														
<p>1. <i>What are the most important challenges in your society for the next 10 years? Please write them down.</i></p> <p>_____</p> <p>_____</p>															
<p>2. <i>Please indicate the urgency of the following aspects for your society (on a 1 to 10 rating scale):</i></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 2px;">Aspects of society</th> <th style="text-align: left; padding: 2px;">Urgency: 1/ not at all urgent to 10/ extremely urgent</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">Increased international competition</td> <td style="width: 150px;"></td> </tr> <tr> <td style="padding: 2px;">Ageing of the work force</td> <td></td> </tr> <tr> <td style="padding: 2px;">Globalization</td> <td></td> </tr> <tr> <td style="padding: 2px;">Shrinking of labor force</td> <td></td> </tr> <tr> <td style="padding: 2px;">Technological change</td> <td></td> </tr> <tr> <td style="padding: 2px;">Decrease in birth rates</td> <td></td> </tr> </tbody> </table>		Aspects of society	Urgency: 1/ not at all urgent to 10/ extremely urgent	Increased international competition		Ageing of the work force		Globalization		Shrinking of labor force		Technological change		Decrease in birth rates	
Aspects of society	Urgency: 1/ not at all urgent to 10/ extremely urgent														
Increased international competition															
Ageing of the work force															
Globalization															
Shrinking of labor force															
Technological change															
Decrease in birth rates															
<p>3. <i>Think about demographic change. What are the particular consequences for your organization/ the organization under consideration?</i></p> <p>_____</p> <p>_____</p>															
<p>4. <i>Why do you think age is an aspect that needs attention for organizational decision and processes?</i></p> <p>_____</p> <p>_____</p>															
<p>5. <i>Does your organization have information available about the current age structure within your organization as well as within particular parts of your organization? (Multiple answers possible)</i></p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes (organization) <input type="checkbox"/> Yes (particular parts of the organization)</p>															
<p>6. <i>Does your organization have information available about the prospective age structure within your organization as well as within particular parts of your organization? (Multiple answers possible)</i></p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes (organization) <input type="checkbox"/> Yes (particular parts of the organization)</p>															
<p>7. <i>How often does your organization conduct age structure analysis?</i></p> <p>_____</p>															
<p>8. <i>For whom are the results of age-structure analysis available?</i></p> <p>_____</p>															
<p>The definition of IGL maintained by the SILVER project members is: "IGL is the process of knowledge building, innovation and knowledge transfer that takes place through lifelong learning among the different cohorts found in an organization".</p>															
<p>9. <i>In your own words: What is IGL?</i></p> <p>_____</p> <p>_____</p>															
<p>10. <i>Which IGL-measures do you know? Give a short description of each IGL-measure you know.</i></p> <p>_____</p> <p>_____</p>															

<p>11. What are the positive consequences of doing intergenerational learning (IGL) for the organization?</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>12. What are the benefits of doing IGL for employees?</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>13. What are the positive consequences of doing IGL for other parties (indicate beneficiaries too)?</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>14. What are the negative consequences of doing IGL?</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>15. In your opinion, what are important conditions of doing IGL in organizations?</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>16. In your opinion, what are supportive factors for doing IGL in organizations?</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>17. In your opinion, what are barriers for doing IGL in organizations?</p> <p>_____</p> <p>_____</p> <p>_____</p>

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

	<p>Level-of-awareness scan: Analysis of the answers for each stakeholder/ stakeholder group.</p>
<p>Level-1-awareness: questions 1, 2</p> <p>Question 1: Categorize open answers</p> <p>→ Is demographic change or something related (e.g., ageing of population) mentioned?</p> <p><input type="checkbox"/> Yes: Level-1-awareness</p> <p><input type="checkbox"/> No: Level-1-awareness StAP necessary</p> <p>Question 2:</p> <p>→ How is “ageing of the workforce” rated?</p> <p><input type="checkbox"/> 8 to 10: Level-1-awareness</p> <p><input type="checkbox"/> < 8: Level-1-awareness StAP necessary</p> <p>→ Are the demographic-change-issues judged as being as important as the other issues (+) or constantly lower (-)?</p> <p><input type="checkbox"/> (+): Level-1-awareness</p> <p><input type="checkbox"/> (-): Level-1-awareness StAP necessary</p>	
<p>Level-2-awareness: question 3</p> <p>→ Categorize open answers in terms of: ageing of staff, generation diversity, knowledge-loss/-transfer, personnel recruitment, further training issues; add more categories representing the answers</p> <p>→ Are all mentioned categories of consequences mentioned?</p>	

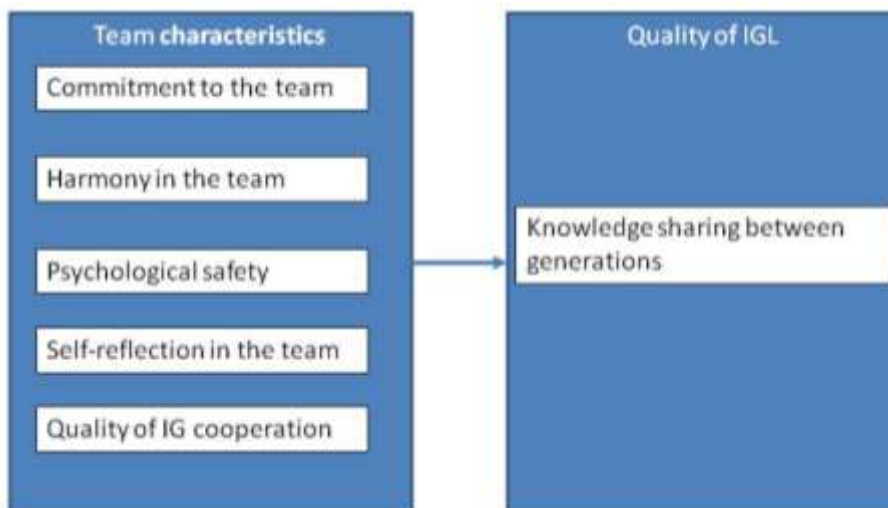
<input type="checkbox"/> Yes: Level-2-awareness <input type="checkbox"/> No: Level-2-awareness StAP necessary → Are ageing of staff and knowledge-loss/-transfer mentioned [both indicators for IGL-importance]? <input type="checkbox"/> Yes: Level-2-awareness <input type="checkbox"/> No: Level-2-awareness StAP necessary
Level-3-awareness: questions 4 to 8 Question 4: Are age-related prejudices and stereotypes mentioned (-) or are generation-related needs mentioned (+)? <input type="checkbox"/> (+): Level-3-awareness <input type="checkbox"/> (-): Level-3-awareness StAP necessary Questions 5 to 8: Is the management/ HRM informed about the age structure of the organization (+)? Is the age structure analysis prospective oriented (future scenarios) (+)? Is the age structure analysis available for the employees in the organization (+)? <input type="checkbox"/> 3 x (+): Level-3-awareness <input type="checkbox"/> < 3 x (+): Level-3-awareness StAP necessary
Level-4-awareness regarding processes of IGL: questions 9 to 10 Question 9: Does the answer reflect an understanding of IGL as something reciprocal (+) and systematic (+)? <input type="checkbox"/> 2 x (+): Level-4-awareness <input type="checkbox"/> < 2 x (+): Level-4-awareness StAP necessary → The definition of IGL maintained by the SILVER project members is: "IGL is the process of knowledge building, innovation and knowledge transfer that takes place through lifelong learning among the different cohorts found in an organization". Question 10: → Classify the answers in terms of mentoring, mixed-aged teams, and training/ workshops; add more categories if necessary. → Are at least three categories of IGL represented and correctly understood? <input type="checkbox"/> Yes: Level-4-awareness <input type="checkbox"/> No: Level-4-awareness StAP necessary
Level-4-awareness regarding benefits of IGL: questions 11 to 14 Questions 11 to 13: Classify the answers for each stakeholder group in terms of: knowledge building, knowledge transfer, knowledge transfer, innovation, improved social relations between generations; add more categories if necessary → Is every category of potential benefits represented? <input type="checkbox"/> Yes: Level-4-awareness <input type="checkbox"/> No: Level-4-awareness StAP necessary → Is there any important stakeholder group without an assigned benefit (-)? <input type="checkbox"/> No: Level-4-awareness <input type="checkbox"/> Yes: Level-4-awareness StAP necessary Question 14: What negative consequences were mentioned? Anything that indicates a lack of level-4-awareness? <input type="checkbox"/> No: Level-4-awareness <input type="checkbox"/> Yes: Level-4-awareness StAP necessary
Level-4-awareness regarding factors important for doing IGL: questions 15 to 17 → Classify all answers in terms of: Factors at (i) the level of the organization, (ii) the level of the organizational units & primary task, (iii) interindividual level, (iv) individual level, (v) level of the environment (chapter 2.3 supports your classification) → Is every level of factors in an organization represented? <input type="checkbox"/> Yes: Level-4-awareness <input type="checkbox"/> No: Level-4-awareness StAP necessary

Appendix 2: Broad organizational scan of the interindividual level of the organization: Questionnaire (phase 5)

This appendix illustrates an alternative approach to realize the organizational scan of the interindividual level of the organization with a particular questionnaire. This questionnaire can be used to assess whether the right conditions are present within your organization or your team for learning between employees of various generations. It is based on the work of Vos, Schamphelaere, & Bruystegem (2011) on generations and team cooperation. The questionnaire measures the following characteristics of team the team:

- Commitment
- Harmony
- Psychological safety
- Self-reflection
- Intergenerational cooperation

In addition it measures the level of knowledge sharing between different age group. The later measurement was adapted from (Faraj & Sproull, 2000). The conceptual model behind the questionnaire is as follows:



Questionnaire

		1. completely disagree	2. disagree	3. agree nor disagree	4. agree	5. completely agree
C1	I am proud to be part of this team.					
C2	I am happy that I am part of this team and not another team in our organisation.					
C3	I feel strongly involved in this team.					
C4	I am prepared to make an extra effort to increase our team's results.					
C5	I am satisfied with my colleagues in this team.					

		1. completely disagree	2. disagree	3. agree nor disagree	4. agree	5. completely agree
H1	The colleagues in our team support each others ideas.					
H2	The colleagues in our team are friendly to each other.					
H3	There is a "we" feeling among colleagues in our team.					
H4	Regular consultation occurs in our team about who has to take on which tasks. (reverse scoring).					

		1. completely disagree	2. disagree	3. agree nor disagree	4. agree	5. completely agree
PS1	The colleagues in this team can make problems and difficult matters open for discussion.					
PS2	If you make a mistake in this team, this is often used against you (reverse scoring).					
PS3	It is safe to take a risk in this team.					
PS4	Sometimes people in this team do not accept others because they are different (reverse scoring).					
PS5	There is no one in this team who would consciously do something that would undermine my efforts.					
PS6	It is difficult to ask colleagues for help in this team (reverse scoring).					
PS7	When I cooperate with colleagues in this team then my experience and competences are appreciated.					

		1. completely disagree	2. disagree	3. agree nor disagree	4. agree	5. completely agree
SR1	We regularly discuss whether the team is working well.					

SR2	We regularly discuss the method that we adopt to perform our assignments in the team.					
SR3	We regularly reflect about how we communicate.					
SR4	It is difficult to make changes in the approach to work open to discussion in this team (reverse scoring).					

		1. completely disagree	2. disagree	3. agree nor disagree	4. agree	5. completely agree
IC1	Employees of different ages work well together in our team.					
IC2	It is good that people from different age categories cooperate in this team, each with their own skills and experience.					
IC3	Colleagues from other generations are open to new ideas.					
IC4	Mutual respect prevails between colleagues of different ages.					
IC5	I feel respected by my colleagues from different generations.					
IC6	The effort of colleagues depends more on the nature of their work than their age.					
IC7	Attention and respect exist for age-specific skills.					
IC8	Respect exists for how each team member works, regardless of the person's age.					

		1. completely disagree	2. disagree	3. agree nor disagree	4. agree	5. completely agree
KS1	Younger knowledgeable team members freely provide older members with hard-to-find knowledge or specialized skills					
KS2	Employees of different ages in our team share their special knowledge and expertise with one another					
KS3	If an older member of our team has some special knowledge about how to perform the team task, he or she is not likely to tell younger members about it (R)					
KS4	There is virtually no exchange of information, knowledge, or sharing of skills among members of different generations(R)					
KS5	If an younger member of our team has some special knowledge about how to perform the team task, he or she is not likely to tell older members about it (R)					
KS6	Older knowledgeable team members freely provide younger members with hard-to-find knowledge or specialized skills					

GE	Gender	Male Female
RO	Role	Manager Employee

YB	Year of birth	
LE	Level of education	TBD
FP	Fulltime of part-time employment	Fulltime Part-time
ST	Status	TBD
LE	Level	TBD
SE	Seniority	TBD

Appendix 3: Level-3 workshop to reduce prevalent age-stereotypes (exemplary illustration)

This appendix illustrates an exemplary StAP, aiming towards rising level-3-awareness.

Name	Level-3-workshop to reflect and reduce age-stereotypes*
Context of application	<input type="checkbox"/> Inner-organizational StAP <input type="checkbox"/> StAP-design phases 1 to 5 are done <input type="checkbox"/> Phase 3 resulted in a lack of level-3-awareness
Aims of intervention	<input type="checkbox"/> Illustration of age-related thoughts and prejudices <input type="checkbox"/> Reduction of age-related prejudices
Roles in the process: Specify the WHO & WHAT	<input type="checkbox"/> Actor: SILVER project team (1 person), acts as the moderator <input type="checkbox"/> Target group: Middle managers of the company XYZ <input type="checkbox"/> Participants: 4 to 15 middle managers, voluntary participation
Preparation	<input type="checkbox"/> Pre-questionnaire to participants (to be fulfilled on their own) about: age (birth date or age cohort), self-description as “old” to “young” (1 to 5 scale) in terms of (i) how I feel, (ii) how others see me, (iii) my role in this company; expectations towards the workshop
Implementation	<ol style="list-style-type: none"> 1. Welcome (including reflection of expectations) 2. Moderator splits the group in terms of age (based on the pre-questionnaire), at least two groups necessary 3. Group work: Collect attributes of the present age-groups (at least “young” & “old”), write them down on colored cards, sort them on terms of age-relations 4. Group work: Groups should develop a short role play, playing in their working context, with imagination of employees who fully behave in accordance with the stereotypes (should be excessively overplayed) 5. Playing the role plays (intervention will be necessary when the mood switches from humor to offence) 6. Each age group now should take a stand to the stereotypes and prejudices (e.g., rating the degree of truth) 7. Each individual should think about one situation, where a representative (in the work context) showed a behavior as opposed to the prejudices of his/ her age-group 8. Reflection about this situation → moderator should support that the group comes into talk about multiple exceptions 9. Moderator summarizes 10. Group work: Influences of prejudices in our work place & implications from the last exercises to overcome those influences (action-plans for participants) 11. Conclusion
Resources & factors to be taken into account: Need to have	<input type="checkbox"/> Time: 1 day (5 to 8 hours) <input type="checkbox"/> Room: 1 large room (conference room) <input type="checkbox"/> Materials: Flipcharts, moderation cards, colored pens and papers <input type="checkbox"/> Participants has to differ in terms of age (at least a “younger” and a “older” group is necessary)

Resources & factors to be taken into account: Nice to have	<input type="checkbox"/> Room: two smaller rooms too (group sessions)				
Evaluation: Explaining “success”/ “results”		results	learning	behavior	organizational results
	SHORT-TERM SUCCESS	liking of the workshop; meeting of expectations	knowing own & general age-related prejudices; reduction of them; learning about differences & similarities of generations	different age-groups start to talk more to each other	
	SHORT-TERM INDICATORS	rating the workshop, trainer/ moderator, results	rating of degree of reduced prejudices; requesting differences & similarities	observation of others	
	LONG-TERM SUCCESS	openness to IGL	application of learned contents (e.g. reflecting needs of generations)	cooperation between generations, improved tolerance & working climate	knowledge of each generation becomes available for others; increased productivity due to improvements
	LONG-TERM INDICATORS	interest or participation in IGL offers	(behavior)	observing or requesting cooperative behavior; work climate questionnaire	long-term collection of productivity and other indicators as well as possible control variables
Postprocessing	<input type="checkbox"/> Post-Questionnaire (develop a questionnaire to measure the short-term indicators that seem to be most important in your context) <input type="checkbox"/> Follow-up questionnaires: 1 week later, 1 month later, 6 month later (develop a questionnaire to measure the long-term indicators that seem to be most important in your context)				
Notes	<input type="checkbox"/> Variations possible, e.g.: Target group = employees				

* Based on a workshop of the BTU group of the SILVER project (June 2012)

Appendix 4: Level-4 inner-organizational competition (exemplary illustration)

This appendix illustrates an exemplary StAP, aiming towards rising level-4-awareness.

Name	Level-4-Competition: How can we use IGL to improve our organization?*
Context of application	<input type="checkbox"/> Inner-organizational StAP <input type="checkbox"/> StAP-design phases 1 to 5 are done <input type="checkbox"/> Phase 3 resulted in a lack of level-4-awareness
Aims of intervention	<input type="checkbox"/> Provide an experience around generations <input type="checkbox"/> Raise awareness about the conditions for, barriers to and benefits of learning in general and IGL in particular
Roles in the process: Specify the WHO & WHAT	<input type="checkbox"/> Actor: Top management (1-2 people) and SILVER Project team member (1 person) to distribute information about the competition, to hold the preliminary workshop and to judge and decide upon the winner <input type="checkbox"/> Target group: Middle managers and knowledge workers of the company XYZ <input type="checkbox"/> Participants: 8 to 60 middle managers and employees of various generations, voluntary participation, work in multigenerational groups
Preparation	<input type="checkbox"/> Create, distribute a pamphlet or e-mail informing all employees about both the upcoming competition and the pre-competition mini-workshop (which is open to all employees who are considering participating in the competition) <input type="checkbox"/> Mini-workshop introducing all of the potential participants to the rules and guidelines of the competition and providing them with information about IGL.
Implementation	<ol style="list-style-type: none"> 1. During the mini-workshop, participants are provided information about IGL, the general aims of this competition (e.g., involvement of employees in the process of generation management) and are then split into teams consisting of employees from various generations (4 to 10 people for each team). Teams are told to find a way to creatively portray (e.g. via a skit, a comic strip, a song, etc.) how IGL could be implemented in their organization, the current barriers to and supporting factors of its implementation, and the effects that its implementation would have. 2. Teams conduct independent work on their own time (a small amount of workday hours are also set aside for project work) 3. A meeting is conducted during which each team presents their final submission for the competition in front of the judges. 4. The winning team presents its submission and is awarded a certificate in front of the entire staff. 5. The competition and the submissions are described in the company newsletter and on the company website. 6. (The top management takes into account all the thoughts of the teams to prepare IGL.)
Resources & factors to be taken into account: Need to have	<input type="checkbox"/> Time: 2 weeks, from the introductory workshop to the presentation of the final submissions <input type="checkbox"/> Room: 1 large room (conference room for preliminary workshop and final presentations of submissions) <input type="checkbox"/> Materials: various arts & crafts materials for the teams to work with (e.g. colored

<p>pencils, drawing pads, etc.)</p> <p><input type="checkbox"/> Groups should consist of employees of various generations</p>					
<p>Resources & factors to be taken into account: Nice to have</p> <p><input type="checkbox"/> Project rooms for each project team</p> <p><input type="checkbox"/> Local media who attend the final meeting and write about it</p> <p><input type="checkbox"/> A prize for the winners that people from different contexts value (e.g., a short trip, vouchers)</p>					
<p>Evaluation: Explaining “success”/ “results”</p>		results	learning	behavior	organizational results
	SHORT-TERM SUCCESS	Many employees actively participate and enjoy creating their submissions; the quality of project submissions from the competition is high	Employees and middle managers have a better idea of factors that are conducive or restrictive to learning and IGL and think about which of these factors exist in their organization	Employees of different generations continue to cooperate and work together in a productive manner	
	SHORT-TERM INDICATORS	Rating the competition after its conclusion; Multiple employees actively participate and submit projects; Rating the quality of results	Follow-up questionnaire/ testing of their knowledge of, for example, barriers to IGL	Observation of employees	
	LONG-TERM SUCCESS		Understanding of IGL and how it can benefit this particular organization	Employees change the relevant supportive factors and barriers for IGL; Employees actively and independently participate in knowledge sharing, knowledge transfer, etc.	Improvements in working environment that are conducive to successful, sustainable IGL; the organization itself got inspired of how to implement IGL
	LONG-TERM INDICATORS		Questionnaire	Active participation in planning and implementation of	IGL (knowledge sharing, knowledge transfer, etc.) becomes a

				IGL	regular occurrence in the organization
Postprocessing	<input type="checkbox"/>	Post-Questionnaire (develop a questionnaire to measure the short-term indicators that seem to be most important in your context)			
Notes	<input type="checkbox"/>	Variations possible, e.g.: topic of competition, amount of participants			
	<input type="checkbox"/>	Variation regarding voluntary participation: Participation may be mandatory, when, e.g., the different departments of an organization are forced to participate			
	<input type="checkbox"/>	The award of the winners may be varied to increase the participation rates			

* Based on a workshop of the BTU group of the SILVER project (June 2012)