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Factors Influencing Baby Boomer Adaptation to a Changing Work Environment

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to a Changing Work Environment

DISSERTATION

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Area of Specialization: Human Resource Development

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ABSTRACT

FACTORS INFLUENCING BABY BOOMER ADAPTATION

TO A CHANGING WORK ENVIRONMENT

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Barry University, 2006

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The purpose of this study was to explore and analyze the experiences of baby boomers to identify factors influencing adaptation to their work environment. A grounded theory methodology was used to understand how baby boomers have adapted to a changing work environment by gaining insight into their personal experiences. The following two broad questions guided the investigation.

1. How do baby boomers perceive their adaptation process in a changing work environment?

2. What factors influenced their adaptation?

The theoretical frameworks that guided this study were Theory of Work Adjustment model (TWA) (Dawis & Lofquist, 1984) and the 8-Dimension Taxonomy model (Pulakos, Arad, Donovan & Plamondon, 2000). Participant perceptions of the adaptation process generally matched the TWA model.

While the findings of the study are generally consistent with the existing literature, they also revealed new and expanded factors that are significant. Those adaptation factors emerging from the data were: (1) flexibility, (2) ability and willingness to learn, (3) attitude, (4) understanding

and working with a diverse workforce, (5) coworker and family support, and (6) ability to

function in an evolving organizational structure.

ACKNOWLEDGEMENTS

DEDICATION

To my parents, Ruth and Bill Raynor

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CHAPTER I

INTRODUCTION

Chapter I presents the nature and scope of the problem under investigation, rationale of the study, origins of interest in the topic, and statement of the research questions. The theoretical framework as well as significance of the study is discussed.

Nature and Scope of the Problem under Investigation

Organizations of every type including business, government, and not-for-profit, are experiencing dynamic and dramatic changes in the workplace environment. The rapidly growing influences of globalization, information and communication technologies, worker population demographics and shrinking budgets require management to rethink how an organization functions. Traditional authoritarian hierarchies have been flattened through the elimination of middle managers and increased responsibility for decision-making is passing to the worker level. Organizational evolution has been replaced by structural revolution and the net result is a work environment requiring continuous employee adaptation (Edwards & Morrison, 1994; Hollenbeck, LePine & Ilgen, 1996; Ilgen & Pulakos, 1999; Yeatts, Folts & Knapp, 1999).

In today's economic environment where senior management's performance is frequently measured by strong quarterly reports rather than long term return on investment, a leader's vision may seem conflicting versus clearly defined. Senior management must address tangible financial issues versus cultural issues where measurable results may not be concrete. Consequently, given the speed at which the global economy is evolving and the pressure on management to perform fiscally, combined with the need to invest in technological advances, many organizations are hard pressed from managerial, training and financial positions to assist workers with the adaptation process. Additionally, for older workers, resistance to change has

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been intense with many experiencing difficulty adapting while others are electing to leave the workforce altogether (Dawis & Lofquist, 1984; Doverspike, 2000).

From a human resources perspective, it appears there are three groups of uniquely different older individuals that employers will encounter in the labor pool in the years ahead. The first group is that less sophisticated, lower income laborer who has, for one reason or another, been unable or has chosen not to prepare for funding retirement. This group will be forced to work to make ends meet. The second group is that group of enthusiastic workers who have prepared for retirement but are choosing to remain working because of the many intrinsic and extrinsic rewards they receive. The third group is comprised of those individuals who, at age 55, received early retirement buyouts from employers. While early retirement was the American dream, many in this group are finding the lifestyle is not as enjoyable or as inexpensive as anticipated. Consequently many are returning to the workforce seeking the structure and social interaction they have missed. A primary issue for organizations is not just one of requiring worker adaptation, but developing a process which enables older workers to develop adaptation skills that ensure ongoing success as opposed to focusing on short-term results (Mergenhagen, 1994).

To understand the impact of adaptation on older workers, it is necessary to gain an appreciation for the reference points from which change occurs. The typical older American worker was employed in a traditionally managed environment in which work occurred in different and specialized tasks. Work was territorial and over time, the individual became an expert in his/her skill area. The transfer of knowledge, for the most part, was limited. As teams developed, jobs were redesigned and groups became responsible for a work process. The evolution from individual based production to team based production required a redesign of job fit that brought about an increase in individual knowledge, skills and abilities. The transition

from individualized job fit to team job fit has proven difficult for many older workers (Fossum, Arvey, Paradise, & Robbins, 1986).

As organizations introduce updated technology and require greater personal accountability, older workers are struggling between the past and its simplistic and secure work environment and the current trends of a complex global economy and the insecurity of constant change. As organizations have attempted to transform themselves to remain competitive, many have found both their employees and social structures embedded in environmental arrangements and cultural traditions that are difficult to change. Riley, Kahn, and Foner (1994) refer to this concept as "structural lag". It combines institutional norms involving policies and practices that are based on social qualifiers such as generational careers. For example, most older workers grew up in a society in which careers were male dominated and success was defined by progression up a career ladder. The male was the dominant breadwinner with most households having an at home mom. Organizational policies and practices supported this work environment and the gender roles that existed between males and females. As baby boomers progressed with their careers, a new social phenomenon occurred - the mass influx of the working woman. The work environment exploded with job redesign, promotion competitiveness, and a host of other factors as women demanded their place in the business world and couples realized that their financial dreams were dependent on two incomes. Organizations adapted as policies and practices were modified and updated to address the evolving gender demographics impacting the way business operations were conducted (Riley et al., 1994).

As workers aged and businesses evolved, workers began to realize that job security, personal power and job progression were not necessarily related to years of service or seniority. In many instances there was a growing disconnect between traditional career paths and corporate

needs. Unions declined and corporate policies and practices became more business friendly enabling companies to address the competitive realities of an evolving global economy. Workers were swept up in a process that frequently seemed out of control, and adapting to new ways of doing business was difficult (Moen, 1998).

Organizations began to recognize the dilemma older workers were facing. If the organization's position regarding knowledge, skills and abilities was clearly defined, then understanding the older worker's position was essential to assessing fit. Belaustegui and Keilly (2001) noted that the older worker group classified as boomers is not homogeneous, yet there are many personal aspects the group shares. For example, they listed five core values and factors that cross the age barriers: (1) they grew up optimistic, (2) they grew up feeling entitled, (3) they grew up as rule breakers, (4) they grew up idealistic, and (5) they grew up dominant. They viewed boomers as individuals who work smart and are self-absorbed, individualistic and revolutionary.

The impact of globalization has resulted in an international community faced with unprecedented growth in economic and social inter-dependence. The advances made in telecommunications and computer technology, combined with countries aggressively pursuing business development, have helped create new global workforces that have changed the structure of large corporations and how they produce and take their products to market. Large-scale partnerships, mergers and acquisitions have resulted in diverse organizations combining their assets to gain strategic economic advantages and access to a wider range of consumer markets. This has resulted in employee upheaval as the requirement for learning new jobs has been combined with layoffs and outsourcing, as well as a need for a more flexible workforce able to

compete on a world-class scale. For example, a multi-national company with its headquarters in New York City may have production and sales operations in the United States, Southeast Asia and Europe, with support services based in Africa and India. In effect, work can now be completed regardless of national borders, and with the appearance that all employees are sitting in the same room (MacDonald, 1997).

Technology has also changed the manner in which work is done. Technology has resulted in multi-tasking which has been both challenging and rewarding. For some workers, multi-tasking may be overwhelming and too stressful to handle, while for others, multi-tasking means growth and development, as well as, a way to avoid boredom from traditional single task jobs. Once again, human resource professionals are afforded the opportunity to explore this area with potential workers to determine their ability to multi-task within the framework of the job fit. The dynamically changing work environment requires workers to become increasingly adaptive (Robertson, 2000).

While there is extensive data describing baby boomer demographics and exhaustive research discussing adaptation, there is no study that specifically addresses baby boomer adaptation to a changing work environment. Consequently, HRD professionals lack an understanding and deeper appreciation for this complex managerial and organizational issue. This gap in knowledge may very well hinder organizations from capitalizing on managing a vital resource essential to their future success. Therefore, if HRD professionals are to be successful in addressing current and future labor issues, they must develop expertise in this subject area.

<div align="center">Purpose and Research Questions</div>

The purpose of this study was to explore and analyze the experiences of baby boomers to identify factors influencing adaptation to their work environment. The goal was to understand

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how baby boomers have adapted to a changing work environment by gaining insight into their personal experiences using naturalistic inquiry. The study focused on two areas: (1) baby boomer perceptions of their adaptation process in a changing work environment, and (2) factors that influenced their adaptation. Using theoretical sampling, the following two broad questions guided the investigation.

1. How do baby boomers perceive their adaptation process in a changing work environment?

2. What factors influenced baby boomer(s) adaptation?

<center>Origins of Researcher's Interest in the Topic</center>

I am a baby boomer who began my career in human resources in 1972. Having worked in this field for the U.S. Army, three international Fortune 500 companies as well as smaller regional organizations, I have watched the HRD profession struggle to keep pace with the rapid changes in the global economy. During my career, computers have evolved from vacuum tube behemoths with tape drives to miniature machines capable of managing millions of transactions on chips the size of the head of a pin. For the typical baby boomer while growing up, a trip down memory lane reveals telephones were rotary, math was done with a slide rule, milk was delivered to the door by the milkman, and email was not what the postman stuffed in your mail box. Work was different.

Today, overall technological advances in data record keeping and communications have revolutionized how work is done. Research conducted by futurist Dr. Ken Dychtwald (2005a) of Age Wave, discussed how baby boomers have transformed lifestyles in terms of the following: (1) snack foods emerged, restaurants and supermarkets have changed, (2) baby boomer's clothing styles have radically changed, (3) the automotive industry has been transformed with the

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introduction of mini-vans and SUVs, (4) attitudes and practices of sex roles have changed dramatically, (5) boomers have transformed the workplace, personal relationships and the institution of marriage, how money and debt is managed, and how healthcare is administered, (6) technology has been transformed from the introduction of computers to wireless communications, and (7) with trillions in assets they have transformed the stock market (Dychtwald). Perhaps no other generation in history has impacted society so extensively in such a short period of time.

Just as HRD professionals have found it necessary to adapt to the changing work environment, so has the general work force. Baby boomers, as a cohort, have experienced revolutionary changes in computer technology, methods of communication and travel, the delivery of health care resulting in living longer, socio-economic related values and political idealism, methods for conducting business, ideas about personal well-being and living and the list continues. With every change comes the requirement to adapt to something new or different. Nowhere, than in the work place, is this most evident.

In the next decade, as an HRD professional, I will personally be required to confront recruiting, training and retaining employees in this changing work environment. Projected demographic data reveals that baby boomers will comprise a major portion of the overall labor pool. Given the difficulties workers have adapting to change combined with this significant portion of the population with which I must work, understanding how baby boomers adapt and developing programs and systems to assist with that process will become imperative if I am to be successful. This study affords me the opportunity to enhance my personal career while contributing to the field of HRD.

Theoretical Framework

As stated, the purpose of this study was to explore and analyze the experiences of baby boomers to identify factors influencing adaptation to their work environment. To accomplish that goal, it was necessary to address the process component of how baby boomers perceive their adaptation process in a changing work environment concurrently with the influence component of identifying those factors that influenced their adaptation. Because this study focused on both how and what, two distinct, yet closely related, theoretical frameworks served as reference points. Those models were the process based Minnesota Theory of Work Adjustment (Dawis & Lofquist, 1984) and the influence based 8-Dimension Taxonomy model (Pulakos, Arad, Donovan & Plamondon, 2000).

Theory of Work Adjustment Model (TWA)

The purpose of using the Theory of Work Adjustment model in this study was to help identify how baby boomers perceive adaptation to their work environment as a process. The Theory of Work Adjustment is a process model that is classified among a category of theories called person-environment (P-E) theories (Dawis & Lofquist, 1984). Adjustment is seen as the result of an interaction between an individual and his environment including work, home, school, family, community and other interactive arenas (Dawis & Lofquist). TWA is also a psychological theory that addresses a person's behavior. However, behavior always occurs in the context of an environment. Therefore, any study of a person's behavior must take place within the environment during which the behavior occurs. Thus, this psychological theory of behavior is specifically geared toward the work environment and, as the work environment changes, so will the behavior (Dawis & Lofquist).

The TWA model is based on four premises: (1) individuals possess needs and abilities

along with other attributes that correspond with the work environment including skills and ability requirements, (2) work adjustment is viewed as an issue of fit and is measured by mutual satisfaction, acceptable job performance and job tenure, (3) the process of adjustment involves the interaction of Person (P) and Environment (E) variables rather than the variables themselves, and (4) successful adaptation can be predicted (Dawis & Lofquist, 1984).

Conceptually, the TWA model is comprised of the following: (1) people have biological needs associated with survival and psychological needs associated with well-being, (2) some needs are genetically inherited and conditioned by the environment, (3) overtime, usually in adulthood, homeostasis occurs, (4) when homeostasis occurs in the work environment, there is P-E fit, (5) fit is a function of matching personal characteristics with corresponding environmental characteristics, (6) performance is a function of good P-E fit, and (7) when good fit occurs, so does job tenure (Dawis & Lofquist, 1984).

The TWA model is predictive by design with Dawis and Lofquist (1984) stressing that: (1) success is achieved when both the worker and organization are satisfied with each other, (2) the higher the level of satisfaction, the longer the period of tenure or length of employment, (3) both the worker and the organization play proactive, reactive and tolerant roles, (4) managers and workers must work together to achieve success, and (5) adaptation is cyclical and ongoing.

The 8-Dimension Taxonomy Model

The 8-Dimension Taxonomy model was developed by Pulakos et al. (2000) and explored the concept of adaptive performance in work contexts and more precisely defined the adaptive performance requirements of jobs. Built on the TWA model to predict adaptive performance, the study included 739 military personnel representing a cross section of military occupations from six different installations across the United States. Baby boomers were not significantly

represented. Based on the findings of their study, Pulakos et al (2000) identified eight dimensions for predicting adaptive performance. Those performance dimensions include: (1) solving problems creatively, (2) dealing with uncertain/unpredictable work situations, (3) learning new tasks, technologies and procedures, (4) demonstrating interpersonal adaptability, (5) demonstrating cultural adaptability, (6) demonstrating physically oriented adaptability, (7) handling work stress, and (8) handling emergencies or crisis situations. Their findings were rooted in research conducted by Campbell, McCloy, Oppler, and Sager (1993) who suggested that job performance and behavior are synonymous. They stated that behaviors could be observed and measured in relationship to an individual's proficiency or contribution level. The link, therefore, is that adaptation factors must be related to specific performance factors that can be measured.

Further research published by Pulakos et al. (2002) developed a series of predictive measures for performance adaptation. They included: (1) past experience adapting, (2) interest in adaptive situations, (3) task-specific self-efficacy to adapt, (4) openness, (5) emotional stability, (6) achievement motivation, (7) cognitive ability, and (8) unlikely virtues. If we consider that these adaptive dimensions and predictors of job performance exist in the context of their research, this framework of adaptation may serve as an excellent lens from which to compare and relate baby boomer adaptation factors to a changing work environment.

Boundaries of the Study

The baby boomer cohort consists of 77 million individuals. Given the large pool of potential participants and the virtually unlimited opportunities to study adaptation within a variety of arenas, this study narrowed its focus on middle managers within the health care industry.

Assumptions

All individuals possess certain sets of recognized and unrecognized assumptions. Advances in knowledge are made by seeking new insights that move us beyond our assumptions (Strauss & Corbin, 1998). In this study, the following assumptions were made:

1. Multiple realities are an inherent concept given the broad demographic backgrounds and experiences of the baby boomer cohort. There may be co-existing multiple realities at play, including my own, that impact the interpretation and analysis of each individual's experience.

2. Having been involved in the field of human resources for over 30 years, I possess my own thoughts on adaptation in the work place with personal biases that must be taken into consideration.

Given the challenges faced by human resource professionals in the coming decade regarding the impact of the baby boomer generation on the labor market, it is important to continue research that may contribute to society and the profession.

Significance of the Study

This study contributes to the field of human resource development (HRD) by addressing a number of critical issues. First, over the next 20 years, human resource professionals will be faced with the daunting task of dealing with increased labor needs and a decreasing pool of available workers. Current U.S. Bureau of Labor (2003) estimates project our economy will support 167,754,000 jobs by the year 2010 with an available workforce of 157,721,000. This leaves a shortfall of over 10 million workers. Key to human resource professional success will be the ability to tap the non-traditional workers, the majority of which are baby boomers. Therefore, it will be essential to learn why baby boomers are remaining in and returning to the

labor market, as well as understand how to assist with their adaptation to a changing work environment (Toossi, 2002; Yeatts et al., 1999).

Second, limited research has been done to identify factors influencing older worker adaptation to workplace change (Yeatts et al., 1999). While conceptual frameworks exist for work adaptation, little information is available to help us better understand the process by which older workers adapt to workplace change. Yeatts et al. also wrote that there is a specific definition of older versus younger workers or clarification of work groups by age. Further, while a wealth of research from the 1980's and 1990's exists regarding older worker adaptation, there appears to be a need for more current research in this area. More specifically, there is a need to clarify the best predictors of adaptive performance (Griffin & Hesketh, 2003). Accordingly, the study was be conducted from the perspective of the specific age group identified as baby boomers. Therefore, the study contributes to existing theories of adaptation by helping fill the identified gap for this age cohort.

Third, the results of this study may be used by HRD professionals to help establish a work environment supportive to older worker adaptation, while addressing their labor needs in the decade ahead. As HRD professionals use the findings of this study to address labor issues, the opportunity will arise to further study the impact of updated interventions helping to maximize organizational performance.

Finally, this study will contribute to theoretical frameworks for work adaptation. HRD professionals will benefit from the increased knowledge that will enable them to assist baby boomers in adapting to a changing work environment (Yeatts et al., 1999).

Definition of Terms

This study defines the specific terms used in the research as follows:

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Adaptability

Adaptability is defined as a generalized state of readiness to respond to new situations. Adaptation is viewed as a process in which the individual applies adaptability in response to a specific change or altered circumstance. Adaptability is what helps people change (Morrison & Hall, 2003).

Adaptation

Atchley (1987, p. 243) defined adaptation as "the process of adjusting oneself, both inwardly and outwardly, to fit a situation or environment". If this definition were extended to the work place, conceptually, work adaptation could be viewed as a continuous and dynamic process in which the worker seeks to establish a reciprocal relationship or job fit. If each job has knowledge, skill and ability requirements, and each employee has needs, values and interest requirements, then it stands to reason that the extent to which a reciprocal balance exists, so too is there job fit. Consequently, a relative level of satisfaction by both parties should exist. Conversely, the extent to which any of these factors change resulting in adaptation should also correlate to the worker's ability to adapt and either remain on the job or see employment discontinued. Therefore, individual adaptation and satisfaction are influenced by a number of individual, organizational and environmental factors all of which are interrelated (Yeatts et al., 2000).

Adaptive Behavior

The acquisition of skills needed for successful adaptation and the absence of behaviors that impede effective adjustment (Bruininks & McGrew, 1987).

Adaptive Performance

"…altering behavior to meet the demands of the environment, an event, or a new situation"

(Pulakos et al., 2000, p. 17). It has been considered in terms of the following adaptability

dimensions: (1) solving problems creatively, (2) dealing with uncertain or unpredictable work

situations, (3) learning new tasks, technologies and procedures, (4) demonstrating interpersonal

adaptability, (5) demonstrating cultural adaptability, (6) demonstrating physically oriented

adaptability, (7) handling work stress, and (8) handling emergencies or crisis situations (Pulakos

et al., 2002).

Baby Boomers

The Baby Boomer generation is that group of Americans born between 1946 and 1964

(American Association of Retired Persons [AARP], 1999).

Grounded Theory

A qualitative research methodology through which a systematic generation of theory

emerges from acquired data and specific analytic methods (Glaser & Strauss, 1967; Strauss &

Corbin, 1990).

Health Care Industry

The term refers to a broad spectrum of organizations providing healthcare services. The list

includes medical facilities such as hospitals, clinics, nursing homes, mental health providers,

insurance carriers, manufacturers of pharmaceuticals and biotechnology firms, providers of

specialized care, web-based service providers, research facilities such as universities and

independent laboratories and governmental agencies including the Center for Disease Control

(Object Technology Solutions, Inc., 2005).

 Middle Manager

The term evolved to describe a function that occurred in the middle of a traditional

hierarchical organization. Middle managers represent a classification of individuals in between

senior management and front-line supervisors and serve as a bridge between the groups. Middle managers have evolved in the last several years from individuals responsible for reporting and controlling workers to leaders who solve problems through building relationships (Farquhar, 1998).

Theoretical Sampling

"…the process of data collection for generating theory whereby the analyst jointly collects, codes and analyzes his [sic] data and decides what data to collect next and where to find them, in order to develop his [sic] theory as it emerges" (Glaser & Strauss, 1967, p. 45).

Summary

This chapter presented the nature and scope of the problem under investigation, justification and rationale of the study, origins of interest in the topic and statement of the research questions. The theoretical framework, as well as significance of the study, were discussed. It also provided an overview of how life and work factors have evolved in response to advances in technology, changes in attitudes and a changing economy. The paucity of research on baby boomer adaptation to a changing work environment represents a unique and outstanding opportunity to contribute to the field of HRD, while concurrently contributing to the basis of adaptation theory.

CHAPTER II

REVIEW OF THE LITERATURE

This chapter provides a rich source of data on the baby boomer cohort, including

demographics, as well as a comprehensive overview of personality characteristics influencing

adaptation. This is followed by research on adaptive behavior and a review of Hall et al's. (2001)

Model of Adaptability and Adaptation. The review becomes more focused as the discussion

moves to the work environment venue and examines Dawis and Lofquist (1984) Minnesota

Theory of Work Adjustment and Pulakos et al. (2000, 2002) 8-dimension taxonomy for

predicting performance behavior models.

Baby Boomers

The baby boomer generation, that group of Americans born between 1946 and 1964, has

had a tremendous impact on society since the 1960s. From the youth culture created during the

Vietnam War to the dual incomes of the 1980s and 1990s, this group will rewrite the meaning of

retirement during the next 20 years (AARP, 1999). Totaling a population of 77 million, boomers

represent the largest population cohort in American history and by 2010 will dominate this

country's fastest growing age group at 30.1% or more than double any other cohort. At 26% of

the total population, they control 74% of personal financial assets, have 50% of discretionary

income and are about to inherit trillions of dollars. Nearly one-third are single with few

dependents. This generation represents the first of affluent women with 25% out-earning their

husbands (AARP). They are the first group to make the leap from thinking domestically to

globally, or from American made cars to foreign, from white-Anglo-Saxon protestant (WASP) to

multi-cultural, from evolution to revolution, and from thinking of hard assets in terms of

Standard Oil to Information based assets such as Microsoft (Belaustegui & Keilly, 2001).

By 2025, one in five Americans will be age 65 or older. Yet in spite of these amazing statistics, 50% of American homes have less than $1,000 in financial assets while 63% of retirees have annual incomes of $25,000 or less. Many boomers are unprepared and their retirement plans are under-funded necessitating either delayed retirement or a return to the workforce (Simon-Rusinowitz, Wilson, Marks, Krach, & Welch, 1998).

With a cohort life span range of nearly 20 years, baby boomers cross a wide swath in terms of life stages, values and experiences. While a tendency may exist to think of this group as cohesive, it is more realistic to assess and analyze the cohort's diverse characteristics that so profoundly have and will continue to impact their individual life styles. For government and business planners, baby boomers present numerous challenges as efforts are made to tap into their values, attitudes and behaviors as they prepare for later adulthood (AARP, 1999). For example, for many, retiring will be their primary focus with concerns over health care eating away at their finances. Some will be looking to start new careers for pleasure while others return to work to make ends meet (Simon-Rusinowitz et al., 1998).

Over the next 20 years, human resource professionals will be faced with the daunting task of dealing with increased labor needs while working with a totally non-traditional workforce pool. While the pool of available workers will increase from 141 million to nearly 192 million by 2050, the bulk of that growth will occur in the next twenty years as more women and immigrants enter the workforce. This will be combined with many baby boomers returning to the labor market as well (Toossi, 2002). Yet as this work force grows, the average worker's age will increase from 38.7 in 1998 to 40.7 in 2008. As the age of workers increases, so too will the number of workers who leave the labor pool due to death, disability and retirement (Dohm, 2000).

Dohm's (2000) research notes that specific trends affecting boomers and their retirement plans include (1) changes in Social Security eligibility criteria raising the age for collecting full benefits from age 65 to 67, (2) the elimination of the earnings limit on the amount that Social Security recipients can earn between the ages of 65 and 69 before forfeiting benefits occurs, and (3) organizations eliminating and replacing defined benefit pension plans with defined contribution plans (ex. 401(k)s). Further, Dohm's research suggests that 8 out of 10 baby boomers intend to continue working during retirement but not necessarily in their primary career field or full-time. Many baby boomers: (1) have not adequately prepared for retirement, (2) are faced with a combination of Social Security incentives and disincentives for continuing to work, and (3) have found opportunities to continue working as the demand for reliable workers is increasing. Consequently, these factors will most likely result in a significant number of baby boomers remaining in or returning to the work force.

There appears to be two key drivers or polarized factors for boomers to continue working in the years ahead. As previously mentioned, not having saved enough money to fund retirement is one reason. In 1996, the Merrill Lynch Baby Boom Retirement Index indicated that the typical boomer needed to triple their savings rate and that many boomers face a savings crisis. This coincides with other privately funded and governmental research (Yamin, 1996). The AARP (1999) study revealed that this group of "Have Nots" comprises approximately 25% of the baby boomer population who are at the lower end of the income scale. This group is dependent upon Social Security as their primary source of retirement income and Medicare for their healthcare. The level of retirement planning knowledge for this group also appears to be lower coinciding with their expectations that the system will take care of them. This group will pose serious challenges for government planners, as the level of financial disparity and resulting frustration

with the income gaps become a significant sociological and political issue that must be addressed.

The second driver for those remaining in or reentering the workforce appears to be based on a totally different set of criteria. Many baby boomers experienced a significant life style change in the late 1980s and early 1990s as the economy changed and the recession occurred. As a result, this affected group developed new values and traits based on self-reliance and independence. Layoffs, downsizing and a continuing scaling back of benefits forced this group to learn to take care of themselves if they were to survive and prosper. This approach has carried over into planning for retirement. Because this group was able to succeed before, they believe they will do it again in retirement. The group is positive, optimistic and is far more enthusiastic as they approach retirement (AARP, 1999).

From a human resources perspective, it appears that there are three groups of uniquely different individuals that employers will encounter in the labor pool in the years ahead. The first group is that less sophisticated, lower income laborer who has, for one reason or another, been unable or has chosen not to prepare for funding retirement. This group will be forced to work to make ends meet. The second group is that group of enthusiastic workers who have prepared for retirement but are choosing to remain working because of the many intrinsic and extrinsic rewards they receive. The third group is comprised of those individuals who at age 55 received early retirement buyouts from employers. While early retirement was the American dream, many in this group are finding the lifestyle is not as enjoyable or as inexpensive as anticipated. Consequently many are returning to the workforce seeking the structure and social interaction they have missed (Mergenhagen, 1994).

To adequately appreciate the issues of the early retiree returning to work, it is necessary to

review the primary reasons this group chose to retire early. Research conducted by Walker (1982) revealed that "'voluntary' early retirement for some people may reflect social and psychological influences, as well as the arduous or alienating conditions of work" (p. 65). Robertson (2000) expanded on this study by suggesting that while political and economic factors are components in early retirement decisions, key drivers in the decision to retire involve changes in the organization, increased use of technology, and changes in corporate culture all of which could be considered alienating conditions of work. Consequently, as this group of individuals reenters the work force, they are faced with dealing with and adapting to those same issues, and perhaps on an even greater scale, then they encountered at the time of retirement. Helping this group of employees will be a major corporate challenge faced by human resource professionals (Robertson).

When older individuals return to work, they must adapt to their job, their organization and the organizational culture. Conceptualization of the fit process begins by companies recognizing that older workers have needs, values and interests that may be significantly different than those of younger workers. Concurrently, all jobs have knowledge, skill and ability requirements that must be met if the employer is to retain the employee. In the last twenty years, jobs and organizations have changed and evolved rapidly and, in many instances, it has been difficult for workers to adapt. For those workers who have left their jobs and are now returning, the reentry transition may be even more traumatic than any prior adaptation process. An example of issues requiring employees to adapt is replacing the traditional management hierarchy with a more flattened one in which levels of authority are reduced. Thus individual responsibility and decision-making authority is increased at lower organizational levels. The stress of increased responsibility and making decisions in an increasingly competitive environment where personal

accountability is critically important can greatly affect how an individual adapts (Yeatts et al., 2000).

Atchley (1987) defined adaptation as "the process of adjusting oneself, both inwardly and outwardly, to fit a situation or environment" (p. 243). If this definition were extended to the work place, conceptually, work adaptation could be viewed as a continuous and dynamic process in which the worker seeks to establish a reciprocal relationship or job fit. If each job has knowledge, skill and ability requirements, and each employee has needs, values and interest requirements, then it stands to reason that the extent to which a reciprocal balance exists, so is there job fit. Consequently, a relative level of satisfaction by both parties should exist. Conversely, the extent to which any of these factors changes resulting in adaptation should also correlate to the worker's ability to adapt and either remain on the job or see employment discontinued. Therefore, individual adaptation and satisfaction are influenced by a number of individual, organizational and environmental factors all of which are interrelated (Yeatts et al., 2000).

If the organization's position regarding knowledge, skills and abilities is clearly defined, then understanding the baby boomer's position is essential to assessing fit. Belaustegui and Keilly (2001) noted that while baby boomers as a group are not homogeneous, there are many personal aspects the group shares. For example, they list five core values and factors that cross the age barriers: (1) they grew up optimistic, (2) they grew up feeling entitled, (3) the grew up as rule breakers, (4) they grew up idealistic, and (5) they grew up dominant. They see boomers, as individuals who work smart, are self-absorbed, individualistic and revolutionary. This is in comparison to the Mature Generation that works hard, is self sacrificing, believes in teamwork and submits to authority and Generation X that focuses on working for me, is more self reliant,

adaptable and diverse. The pre-boomer generations think in terms of "Uncle Sam Needs You"

versus boomers that think in terms of the "Peace Movement" or Generation X that thinks in

terms of "Shit happens."

The majority of boomers are also now faced with biological changes in the aging process,

including: (1) the onset of diminished physical capabilities in which impairments start occurring

in the senses and mobility, (2) menopause and reduced sex drive, (3) more serious ailments such

as arthritis and osteoporosis as well as heart and cancer issues, and (4) incapacitation or death of

relatives and friends (Belaustegui & Keilly, 2001). Many boomers are experiencing an

emotional transition as they progress into the second half of their life in which they experience:

(1) moving from becoming nobody to being somebody, (2) being internally versus externally

motivated, (3) a need to self-actualize, (4) being more holistic versus attribute driven, and (5)

beginning to see changes in what is important in life (Belaustegui & Keilly).

To implement an effective return to work program for older workers, organizations must

establish programs that address both individual and organizational components that contribute to

the returning worker's ability to successfully adapt to their job, environment and culture.

Normally, it is safe to assume that jobs are constantly being redesigned to update knowledge,

skill and ability requirements (Yeatts et al., 2000). It may also be safe to assume that the newly

redesigned job is more demanding than in the past. In the work environment that was

traditionally managed, work was generally task oriented with individuals developing expertise

based on repetitiveness and familiarity with the process. Frequently, workers did not see a big

picture due to the territorial aspect of their functions (Yeatts et al., 2000). In contrast, today and

in the future, individuals are being replaced by teams that are responsible for entire processes

that accomplish a broader range of tasks. Each team member is expected to have a generalist

knowledge, ability and skill level that permits him or her to perform any or all of each team member's individual tasks. Consequently, for the worker returning to work, human resources professionals must develop assessment programs to determine an individual's ability to function as a team member and the individual's ability to adapt to the new work environment. Training programs must be put in place to assist in the transition to the team, development of knowledge and skills and reestablishing job fit (Yeatts et al., 2000).

One possible indicator human resource professionals can use to assess individual adaptability is the approach baby boomers are taking to life long learning. The U.S. Bureau of Labor Statistics (2003) projected the majority of occupations in which the greatest need for workers will occur between 1998 and 2008 require some operational knowledge of technologies. Technology is the driving force behind job redefinition. The only way to gain that knowledge is through training. Those individuals who are returning to the classroom taking vocational enhancement courses are demonstrating a proactive approach to adapting to the changing labor market and establishing a form of insurance against personal obsolescence (Dover, 2003). Assessing an individual's personal approach to life long learning may be of potential benefit in assessing job, organization and cultural fit.

Technology has also changed the manner in which work is done. Technology has resulted in multi-tasking which has been both challenging and rewarding. For one individual, multi-tasking may be overwhelming and too stressful to handle, while for others, multi-tasking means growth and development, as well as, a way to avoid boredom from traditional single task jobs. Once again, human resource professionals are afforded the opportunity to explore this area with potential workers to determine their ability to multi-task within the framework of the job fit (Robertson, 2000).

Redesigned jobs and work places have been described as enriched work environments (Yeatts et al., 2000). Job enrichment is being discussed in terms of variety, decision-making, global focus and how a job contributes to a product or organization's success (Yeatts et al.). The attitude an individual has toward work can have a profound effect on his or her success in the job, organization and environment. For those older workers used to the traditional job and work environment in which responsibility, value and recognition came from being an expert in a single task approach, if they do not demonstrate the attitude and desire to reestablish job fit under the enriched environment, they are doomed to fail (Yeatts et al.). The key point here does not deal with knowledge, skills and ability, but rather, is more reflective of an individual's ego needs and values involving transitioning from an emotionally based "I" position to a "We" position job fit (Yeatts et al.).

Research conducted by Richardson and Kilty (1992) suggested that interest in work is the single most important predictor of retirement for older black workers. The more interested the individual was in his or her work, the less likely he or she was to retire. Filer and Petri (1988) pointed out that such characteristics as stress, repetitiveness, and high physical demand correlated directly to early retirement decisions. They concluded that redesigning the work environment to account for these factors would reduce unwanted retirement and create more satisfying job fit. Thus as human resource professionals look closely at job descriptions and other environmental factors, assessing, accounting for and making adjustments, where possible, to eliminate these issues may go far in enticing older workers to stay on the job, as well as attract those older workers for whom these issues are important.

The final aspect of attitude is the ability to adapt to change itself. Pinder and Schroeder (1987) found that those who had dealt effectively with change in the past were more receptive

versus resistant to change. In traditional organizations in which seniority was a particular privilege, individuals faced with change often experienced fear of losing their privileges. In turn, resistance to change was frequent due to the concept of losing control and a general sense of insecurity. This window into an individual's perception of change and how it is handled can provide human resource professionals with another valuable tool for assessing an older worker's ability to adapt to the work environment.

In addition to individual job fit aspects, organizational factors play a significant role in an individual's ability to adapt to his work environment. In today's global economy, change is constant and those organizations and individuals who manage change most effectively are frequently most successful. Conversely, those parties that do not effectively manage change may struggle in a variety of ways. Kouzes and Posner (1987) found that employees were less resistant to change when accurate information concerning anticipated change was provided justifying the need. Reluctance and resistance to change was greater when communication was not provided. Change creates anxiety and those steps that can be taken by an organization to reduce anxiety via managing change can greatly enhance the adaptation process. One method of assisting staff is through a process of orientation in which the process and justification for change is clearly explained well in advance of the change. This approach provides employees with the opportunity to absorb the ramifications of the change and how it impacts them (Pinder & Schroeder, 1987).

Another method of implementing change involves participation by employees in the change process especially when the change directly impacts them. As initiatives such as flexible scheduling, job sharing, working from home, and other creative programs are undertaken to address labor scheduling issues, involvement by staff in developing administration plans can be

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extremely beneficial in reducing resistance and gaining support for implementation (Pinder & Schroeder, 1987). As boomers reenter the work force, organizations make themselves more attractive as an employer of choice by offering these types of programs that meet the individual's needs and interests. By balancing the requirements of the organization and the boomer, it is more likely to lead to greater satisfaction and individual-organization fit (Pinder & Schroeder).

Another key component to assisting boomers in adapting to their work place is management and coworker support (Shonk, 1992). Research has shown tremendous success in assisting older workers transitioning into the work environment when management is sympathetic and takes specific steps to help workers become accustomed to their job (Shonk). Of particular importance is the manager's appreciation for the needs, interests and values experienced by the worker and understanding how they influence the transition. By understanding these needs and how they relate to the job and cultural environment, the manager can customize or personalize those actions that will improve the worker's chances for success (Shonk).   For example, in many instances, the job being performed may be viewed by the baby boomer as a demotion. Retiring from a sales manager position to bag boy or security guard may sound neat or cool yet the reality of being wined and dined to watching others being wined and dined can be a blow to an individual's ego. Further, in many instances today, many of the managers may be younger than those workers they supervise. Therefore, training the manager as well as coaching both the manager and worker in overcoming longstanding habits that could otherwise provide barriers to success is essential. Training and actions by the manager should build confidence in both the manager and worker as well as demonstrate the organization's commitment to non-discriminatory practices (Shonk).

The significance of providing manager and coworker support to the individual cannot be underestimated. Since one of the primary drivers for boomers taking early retirement involved technologically driven cultural changes requiring a difficult adaptation process, the concept of the rehired older worker being a valued entity sends an important message throughout the organization. The concept of the good old company becoming lean and mean was difficult for older workers to accept especially for those who had held more traditional positions. The sink or swim approach forced on employees by many organizations just a few years ago will not work in the new management environment in the years ahead. With management appealing to worker pride and personal worth, key values important to worker confidence and satisfaction are addressed. By listening and being sensitive to worker feelings of inadequacy and insecurity, a new type of relationship is fostered that promotes the team concept (Robertson, 2000). Perhaps no other step will prove as important to human resources professionals in assisting the baby boomer to transition back into the work force.

Pinder and Schroeder (1987) demonstrated that support by coworkers was extremely important to establishing job fit. Conversely, the extent to which coworker support is absent can also hinder establishing job fit by creating additional stress and anxiety. Workers need to know they are accepted into their work place and they can count on their peers to be of assistance in learning the "ropes" as well as overcome problems that may arise. Peer support is essential, especially, in times of job transition and organizational change. The dilemma faced by many baby boomers returning to work is that the level of knowledge and experience they bring to the work place may be perceived as threatening to younger, less experienced staff. Those baby boomers used to seniority, based on their tenure, may find their issues and input rejected by those workers who feel intimidated or less secure. Consequently, coworker support may not be

automatic and managers must proactively intervene in tenuous situations that have the potential

to become politically charged and damaging to the business unit (Pinder & Schroeder).

<center>Adaptive Behavior</center>

Literature on the construct of adaptive behavior is exhaustive with its earliest roots studied

in relation to maladaptive behavior. Early theories of maladaptive behavior focused on social

adaptation as efforts were made to address issues of mental retardation, educational inclusion and

environmental integration (McGrew & Bruinicks, 1990). Various theoretical models have been

developed to support personal competence including such aspects as physical competence,

practical intelligence, conceptual intelligence and emotional competence. Adaptive behavior has

also been defined in terms of such varied competencies as cognitive functioning, social skills and

motor abilities. Other terms have included social maturity and social competence (Doll, 1934,

1953).

As theories of adaptive versus maladaptive behavior evolved, many studies have focused on

the concept of personal competence. Bruinicks and McGrew (1987) defined adaptive behavior

as the acquisition of skills needed for successful adaptation and the absence of behaviors that

impede effective adjustment. While more recent research has included social skills and

responsibilities, Atchley (1987) suggested further study must be completed before an ultimate

definition of adaptive behavior is accepted. Thus while the process of adaptation is clearly

defined and generally accepted, the ultimate definition of adaptive behavior remains elusive

(Atchley, 1987). Researchers have been more successful in identifying predictors of adaptive

job performance (Pulakos et al., 2002).

What is generally accepted is that adaptability and adaptation are constructs and individuals

are dynamically modifying their behavior. Adaptability is not a process of simply being reactive

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to one's environment. Rather the process is viewed as complex with individuals assessing and

evaluating their place within the environment and required to make adaptive behavioral choices

as change occurs (Strate & Torraco, 2004). This may involve personal change or changing the

environment. Such environmental actions include changing jobs, family breakup or early

retirement (Strate & Torraco). Coping involves individuals facing ongoing and often

unpredictable demands that require constant adaptation and progression through the adaptation

process (Morrison & Hall, 2003).

Morrison and Hall (2003) suggested that adaptability is a generalized state of readiness to

respond to new situations and that adaptation be viewed as a process in which the individual

applies adaptability in response to a specific change or altered circumstance. In 2001, Dr.

Douglas T. Hall (Hall et al., 2001) developed the Model of Adaptability and Adaptation. In the

model, adaptability consists of two components: (1) having the competence to adapt, and (2) the

motivation to adapt. Adaptive competence and adaptive motivation compliment each other

through a process of an individual having both the ability to adapt to new situations and a desire

to adapt. For example, individuals may have the ability to adapt to a new situation but not the

desire. Conversely, a high level of desire to adapt may result in an individual taking steps to

develop the abilities to change. This leads to a higher level of adaptive competence.

Concurrently, both individual and environmental factors may limit adaptability both generally

and in specific situations. Hall et al. (2001) model accounts for such constraints. Ultimately,

both individual and environmental factors influence the process (Strate & Torraco, 2004).

The term "adaptable" was defined by Savickas (1997) as to learn or to understand. The

basis of the term is when a new situation occurs, individuals must learn, understand and change

to adapt (Strate & Torraco, 2004). Therefore, adaptability is what helps individuals change

(Morrison & Hall, 2003; Strate & Torraco). Hall et al. (2001) model may be summarized by the following formula: *Adaptability = f (Competence, Motivation)* where the ability to adapt is a function of competence and motivation (Hall et al.).

Hall et al. (2002) model is based on the concept that adaptability develops over the span of a lifetime. While there may be significant events that occur, they relate to and build on each other continuously in both work and non-work environments based on the roles individuals play in their lives. Each is linked to and affects the other (Blustein, 1997; Strate & Torraco, 2004).

The impact of change and adaptation on older workers is an area of concern as individuals age and are faced with deteriorating physical and mental conditions. As these older individuals remain in or return to the labor market, maintaining those skills required for their jobs may become increasingly difficult. This may require an even higher level of adaptation skills as environments experience ongoing changes (Baltes & Baltes, 1990; Strate, 2004).

<center>Work Adaptation and Adaptability</center>

Just as theories of adaptive behavior have evolved, so have the application of theories developed in a variety of venues. The Minnesota Theory of Work Adjustment (Dawis & Lofquist, 1984) is perhaps best known and most widely referred to as the foundation for research in this topical area. The theory grew out of a 20-year federally funded project at the University of Minnesota during the 1960s and 1970s that studied how vocational rehabilitation subjects adjusted to work. Data was collected on a wide variety of variables including job satisfaction, work attitudes, job performance ratings, work histories, education and training experiences, aptitudes, needs, interests and personality traits. The broad base of data has provided many opportunities for researchers to focus more specifically on targeted adjustment aspects.

Theory of Work Adjustment Model

The Theory of Work Adjustment (TWA) is classified among a category of theories called person-environment (P-E) theories (Dawis & Lofquist, 1984). Adjustment is seen as the result of an interaction between an individual and his environment including work, home, school, family, community and other interactive arenas (Dawis & Lofquist). TWA is a psychological theory that addresses a person's behavior. However, behavior always occurs in the context of an environment. Therefore, any study of a person's behavior must take place within the environment during which the behavior occurs. Thus, this theory is specifically geared toward the work environment and, as the work environment changes, so will the behavior (Dawis & Lofquist).

Individuals possess specific characteristics such as needs and abilities along with other attributes that correspond with the work environment including skills and ability requirements. Work adjustment is viewed as an issue of fit and is measured by mutual satisfaction, acceptable job performance and job tenure. The key to the theory involves the interaction between a combination of P-E variables rather than the variables themselves. Particular combinations result in particular outcomes (Dawis & Lofquist, 1984). Figure 1 illustrates the Minnesota Theory of Work Adjustment predictive model.
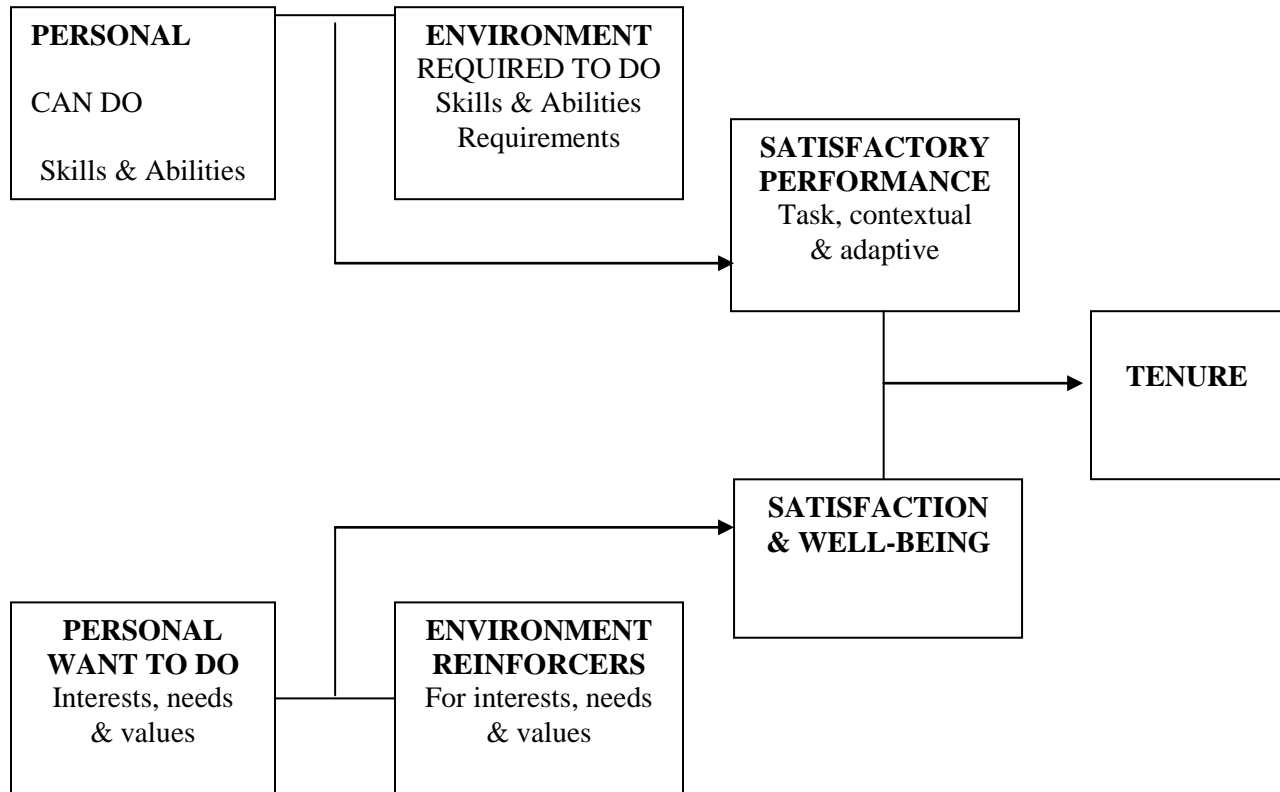
Figure 1. Conceptual Framework: Minnesota Theory of Work Adjustment (Dawis & Lofquist., 1984; Griffin & Hesketh, 2003)

TWA suggests that all people have biological needs associated with survival and psychological needs associated with well-being. The theory presumes that needs are genetically inherited and conditioned by the environment to which individuals are exposed. Over time, and usually by adulthood, a form of homeostasis or stability occurs. Consequently, a central concept of the theory is the relationship that exists between P and E as one that is parallel and complimentary. Thus, in the work environment, when homeostasis occurs, so too does fit. With fulfillment of the mutual requirements comes satisfaction for both P and E (Dawis & Lofquist, 1984).

The core of P-E theories lies in the constructs of fit and interaction. Fit is a function of matching personal characteristics with corresponding environmental characteristics. For example, all jobs have specific skills and abilities requirements while individuals have skills and abilities attributes. Fit occurs when an individual and corresponding job match occurs. Performance is a function of a good fit (Dawis & Lofquist, 1984).

Central to the TWA is E's requirements being fulfilled by P's capabilities and work skills. Those capabilities have been described as basic, genetically inherited human skills including cognitive, affective, motor, physical and sensory-perceptual. All are influenced and shaped by the array of environments experienced through the learning and training process. Adaptation occurs when new skills are acquired and the process is ongoing throughout life. In the work environment, skills are identified to determine how work is done. When the capabilities match, mutual satisfaction occurs and a job fit is achieved (Dawis & Lofquist, 1984).

When predicting adaptive performance, interaction is a function of acting on and reacting to P and E (Dawis & Lofquist, 1984). Workers and work environments are dynamic entities subject to ongoing change. For example, as technological advances are introduced to the work place, job requirements change. This necessitates an intervention or interaction that permits adjustment to the change and helps achieve revised performance expectations. The Theory of Work Adjustment encompasses a process model with an interactive component and a predictive model with a fit component (Dawis & Lofquist).

Adaptability has been studied in a variety of areas relating to many organizational variables such as adapting to new people and teams, cultures, technology, and changes in physical conditions. Given the vast number of potential variables affecting adaptation and the multidimensional aspects of the adaptation process, only recently have studies begun focusing on

the relationship of cognitive abilities and personality constructs in predicting adaptive performance (Edwards & Morrison, 1994; Pulakos et al., 2002).

Two different types of predictive models have been developed, each with a different focus but building on the other. The TWA Predictive Model (Dawis & Lofquist, 1984) is process based and designed to explain how work adjustment is achieved. It provides a mechanism through which adaptive behaviors may be studied to assess their impact on the adjustment process. The second model, Pulakos et al. (2002) 8-dimension taxonomy identified eight behavioral dimensions to be used in predicting adaptive performance. This model was tested on 739 military personnel and studied the impact of both cognitive and non-cognitive factors on predicting adaptive performance (Pulakos et al.). Pulakos et al. 8-dimension taxonomy serves as the conceptual framework for this study. As mutually related building blocks, both the Dawis' and Lofquist TWA predictive model of how workers adapt and Pulakos et al. 8-dimension taxonomy of why workers adapt are discussed.

The TWA predictive model is based on P and E's satisfaction with each other. The extent to which satisfaction exists is measured in terms of tenure. The higher the level of mutual satisfaction, the longer the period of tenure. Conversely, the extent to which dissatisfaction exists may result in work termination. To clarify between P and E's concept of satisfaction, the TWA model notes E's satisfaction with P as *satisfactoriness* while *satisfaction* is used to describe P's satisfaction with E (Dawis & Lofquist, 1984).

The two constructs, by their nature, suggest that a negative dichotomy of *dissatisfactoriness* and *dissatisfaction* also exists. Consequently, four distinct combinations or levels of satisfaction can occur between P and E. Those combinations are: (1) satisfied and satisfactory, (2) satisfied but unsatisfactory, (3) dissatisfied but satisfactory and (4) dissatisfied and dissatisfactory. The

first combination represents the ideal situation for both P and E while the remaining three require that change on some level must ultimately occur. Thus, the critical indicators of work adjustment are satisfaction, satisfactoriness and tenure.

In the work environment, the goal is for a job to be done and the organization to be either maintained or improved. For this to occur, the environment requires the worker to possess specific skills. Concurrently, the environment must possess some capability to satisfy the worker's needs such as pay, benefits, working conditions and recognition. Satisfaction occurs through a process of reinforcement. If mutual satisfaction exists, the constructs are parallel and complimentary (Dawis & Lofquist, 1984).

The key component of TWA is the construct of *correspondence* and is defined in two ways. The first is fit which was previously described as a function of matching personal characteristics with corresponding environmental characteristics. Fit serves as the predictive component of the model. The second aspect is *corresponsiviness* and is the interactive component in which both P and E satisfy the needs of each other (Dawis & Lofquist, 1984).

Predicting work adjustment is a function of treating satisfaction and satisfactoriness as dependent variables while P-E correspondence serves as the independent variables. E's reinforcers predict P's satisfaction while matching P's skills to E's skill requirements predict satisfactoriness. The end result is an ability to predict P's tenure. Positive and negative levels of satisfaction correlate directly to tenure with the correlation being higher for satisfied workers and lower for dissatisfied workers (Dawis & Lofquist, 1984).

The purpose of the TWA model was to provide an explanation for how correspondence is achieved, maintained and reachieved. The model treats adjustment as cyclical in which correspondence and discorrespondence occur and must be addressed (Dawis & Lofquist, 1984).

TWA describes adaptable behaviors as being either proactive, reactive or tolerant. Griffin and Hesketh (2003) define proactive behavior as actions initiated by the individual that have a positive influence on the changed environment. Reactive behavior involves the individual initiating positive personal changes in response to the new environment while tolerant behavior is the individual working to maintain a personal status in spite of the changing environment or when proactive or reactive behavior may not be advantageous (Griffin & Hesketh).

By better understanding the process, managers can assist workers with adaptation to a changing work environment. The potential exists for creating an environment in which workers are counseled and provided the opportunity to enhance their required skills to corresponding changes in job requirements.

A critical aspect of the TWA model involves the worker's individual level of dissatisfaction and to what extent dissatisfaction has to occur before change results. Different individuals handle dissatisfaction differently based on personal needs. The extent to which individuals demonstrate adaptive behavior defines P's level of *flexibility*. According to the theory, those with high levels of flexibility are more readily adaptable and less prone to experiencing dissatisfaction. Conversely, those less flexible become dissatisfied more easily and adjustment is more difficult (Dawis & Lofquist, 1984).

Adaptation is a stressful process. When individuals are required to change, stress is experienced that may be interpreted either positively or negatively. As creatures of habit, individuals seek a level of emotional and physical homeostasis and resist change until the level of uncomfortableness becomes greater than the level of comfort. In other words, individuals tend not to change until faced with the assumption that changing may be more advantageous than not changing (Selye, 1974).

Once the individual initiates the adaptation process, the TWA describes two approaches available in which P may proceed. One method is to take steps to reduce discorrespondence and dissatisfaction. This is accomplished by P requesting that E change its reinforcers or skills requirements or a combination of the two. An example of changing reinforcers is requesting and receiving an increase in pay. This approach is termed *activeness* as it focuses on P requesting E to change. The second approach involves P adjusting his personal needs or skills to correspond with E's. An example is P proactively learning new skills to increase his value to E thus improving his chances of a higher level of compensation. This approach is called *reactiveness.* Both activeness and reactiveness can occur among any of the four combinations of satisfaction (Dawis & Lofquist, 1984).

As the stress builds and the level of dissatisfaction and discorrespondence rises, it becomes only a matter of time before either personal exhaustion occurs or the individual leaves his job. The length of time spent adjusting prior to exhaustion or quitting is determined by the individual's level of *perseverance.*   Perseverance is similar to flexibility in that different individuals possess different levels which impact the adjustment cycle. Ultimately, the adjustment cycle is concluded when P reaches a level of acceptable satisfaction and continues his tenure or reaches a level of dissatisfaction resulting in his termination of employment (Dawis & Lofquist, 1984; Selye, 1974).

8-Dimension Taxonomy Model

Building on the TWA, Pulakos (Pulakos et al., 2000; Pulakos et al., 2002) developed a second model for predicting adaptive performance. Their research investigated an 8-dimension taxonomy or classification of predictors of adaptive job performance. Their goal was to systematically define and empirically examine specific dimensions related to adaptive

performance. Consisting of two phases, the first phase involved the use of content analysis to study critical incidents that were related to adaptive performance in 21 different jobs. Phase two involved utilization of the Job Adaptability Inventory (JAI) to evaluate the 8-dimension taxonomy. The study included 739 military personnel representing a cross section of military occupations from six different installations across the United States. 80% of the participants were male with 76% of the sample age 27 or less and all but 5 of the remaining participants 38 years or younger (Pulakos et al., 2002). Baby boomers were not significantly represented.

The study (Pulakos et al., 2000; Pulakos et al., 2002) examined the relevancy of past experience, interest, and task-specific self-efficacy as predictive measures when targeted against the 8-dimension taxonomy. The study further explored the criterion-based validity of other traditional measures of ability and personality as predictive indicators for adaptive performance. A 5-point Likert scale measured the predictors against the 8 dimensions using an 80-item inventory specific to each predictor. Factor analysis was used to examine the responses. This study is significant as it replicated Pulakos et al. (2000) study and added to the knowledge base by confirming that adaptability is a multidimensional construct that includes but may not be limited to the 8 performance dimensions.

The 8-dimension taxonomy model consists of a series of categories of behaviors that have been extensively researched as adaptability indicators. The first dimension is *solving problems creatively* and is defined as having the ability to solve atypical, ill-defined and complex problems. The second dimension is *dealing with uncertain or unpredictable work situations* and is defined as adjusting and dealing with unpredictable situations by taking reasonable action (Pulakos et al., 2002). The third dimension is *learning new tasks, technologies and procedures* and is defined as anticipating, preparing for and learning skills needed for job requirements in the

future. The fourth dimension is *demonstrating interpersonal adaptability*. This dimension is

defined as adjusting one's interpersonal style to achieve goals, and working with new teams,

coworkers, or customers. The fifth dimension is *demonstrating cultural adaptability* and is

defined as performing effectively in varied cultures by learning new languages, values, traditions

and politics. The sixth dimension is *demonstrating physically oriented adaptability*. This

dimension is defined as adjusting to a variety of physical factors in the environment including

heat, noise and uncomfortable climates. The seventh dimension is *handling work stress* and

involves remaining calm under pressure with the ability to handle frustration and acting as a

calming influence. The eighth and final dimension is *handling emergencies or crisis situations*

and involves reacting appropriately and decisively to situations that are life threatening or

dangerous (Pulakos et al., 2002).

Each of the 8-dimensions was evaluated in the context of the predictive adaptive job

performance measures of past experience, frequency in adapting, interest in working in high

change situations demanding adaptation, and task-specific self-efficacy to adapt. These three

measures were selected based on their high degree of content validity and correlation to the 8-

dimensions (Pulakos et al., 2002).

The basis for measuring the frequency of past experience in adapting was the scientific

premise that the best predictor of future performance is past performance (Griffin & Hesketh,

2003; Owens & Schoenfeldt, 1979). The assumption was that individuals who had experience in

adapting to a specific situation would respond similarly to new situations requiring the same type

of adaptation. To complete the process, an inventory was developed and was scientifically

administered to demonstrate the relationship between the measure and the 8-dimensions.

Examples of past experiences ranged from general situations requiring minor adaptation to

encountering life-threatening situations involving major behavioral adjustments. Using

confirmatory factor analysis, the findings showed past experience to have a statistically high

correlation with predicting future adaptation (Pulakos et al., 2002).

The second measure assessed participant interest in working in high change situations

demanding adaptation. The basis for the measure was research indicating an individual's interest

relevant to the job could play an important role in predicting future performance. Again, the

statistical results of the study suggested support for the measure as a predictor of future

performance (Pulakos et al., 2002).

Self-efficacy, the third measure, is a personal belief in the ability to perform specific

behaviors. Bandura (1986) defined self-efficacy as an individual's belief that he possesses the

skills and abilities to complete a specific task resulting in a specific outcome. Because it is a

belief, it is not based on what an individual can actually do but a belief in what the individual

believes he or she is capable of doing (Griffin & Hesketh, 2003; Parker, 1998). Bandura (1977)

theorized that self-efficacy is a motivational construct related to specific tasks. Consequently,

adaptive behaviors follow experiences in which previous behaviors worked successfully. Thus

based on past experience, the individual believes he will again be successful in adapting to

similar situations in the future. The results of Pulakos et al., (2002) study again demonstrated

that a significant relationship exists between the measure and the 8-dimensions.

Five Factor Model of Personality

Some researchers believe adaptability to be a personality trait (Chan, 2000). The Big 5, also

known as the Five Factor Model of Personality (McCrae & Costa, 1997), is based on the idea

that personality can be described and measured on five broad dimensions: Openness,

Conscientiousness, Extraversion, Agreeableness and Neuroticism. The theory is also known as

OCEAN -- made of the first letters of the five traits. Of the five personality traits, openness to experience is most closely associated with adaptability. Individuals ranked high in openness tend to have characteristics of being sensitive and empathetic; imaginative, curious, and creative; flexible and tolerant; and adventurous, original, and artistic. Those who rank low on openness tend to be conventional thinkers who avoid the unfamiliar, lack artistic talents as well as lack imagination (Griffin & Hesketh, 2003; McCrae & Costa, 1997; Pulakos et al., 2002).

Barrick and Mount (1991) noted that individuals who ranked high versus low in openness performed at a higher level when adapting to new tasks. Further, in findings reported by Judge, Thorensen, Pucik, and Welbourne (1999), openness was found to have a positive correlation with coping with organizational change. This further supports the role that openness plays in predicting adaptability (Pulakos et al., 2002).

Neuroticism, the last of the five personality traits includes the component of emotional stability. Emotional stability has been defined as staying calm and not easily rattled in the face of changing situations that are difficult and stressful (McCrae & Costa, 1997; Pulakos et al., 2002). Therefore, efforts have been made to link emotional stability to two of the 8-dimensions including handling work stress and adapting to changing situations. Research has shown emotional stability to be a valid predictor of job performance (Hough, 1992; Pulakos et al., 2002).

Jobs are normally described in terms of the tasks required to be performed. Since the performance of tasks requires basic skills, job descriptions also include those skills needed for the position (Dawis & Lofquist, 1984). Fundamental to basic skills is some level of cognitive ability. Cognitive ability is defined as any cognitive activity that is related to enhance cognitive processing (Royer, 2005). Rapid mental calculation, for example, is a cognitive ability that is

related to the ability to solve math problems. Cognitive ability is conscious intellectual activity such as thinking, reasoning, remembering, imagining, or learning words (Royer).

Research suggests that intelligence and cognitive ability are essential to an individual's ability to adapt (Pulakos et al., 2002). Further, it has been proposed that successfully adapting to a wide variety of changing situations may be a function of the level of intelligence an individual possesses. Cognitive ability is easily assessed through a variety of testing mechanisms. The 8-dimension study (Pulakos et al.) results demonstrated similar high correlations to previous research indicating cognitive ability is an effective tool in predicting adaptive performance.

Studies have shown that achievement motivation is a highly effective predictor of job performance and is influential in how individuals adapt to new situations and tasks (Dweck, 1986; Pulakos et al. 2002). McClelland (1998), a pioneer in workplace motivation proposed that individuals possess three types of motivational needs. Best known for his research on the need for achievement, he theorized that achievement motivated individuals seek achievement, attainment of realistic but challenging goals and job advancement. He found that individuals have a strong need for feedback regarding achievement, progress and a need for a sense of accomplishment.

McClelland's (1988) research suggested that while not all people have a strong achievement based motivation, those who do tend to be consistent in establishing goals. However those who do, tend to have a results-driven character that combines effort and ability to achieve. He suggested that achievement-motivated individuals possess the following characteristics and attitudes: (1) material or financial reward is not as important as achievement, (2) receiving praise and recognition is not as satisfying as accomplishing the task, (3) financial reward is considered a measurement of success but not an end in itself, (4) neither security or status are

motivators of achievement-motivated people, (5) reliable, quantifiable, and factual feedback is more important than praise or recognition, (6) achievement-motivated individuals are constantly seeking ways to improve and do things better, and (7) achievement-motivated individuals gravitate to jobs that satisfy their needs. McClelland (1988) proposed that those most likely to complete tasks and achieve desired results are achievement motivated. They have a tendency to transfer their own drive onto others and may come across as too demanding as others may not share the same need to achieve (McClelland).

Research on the 8-dimension taxonomy (Pulakos et al., 2002) demonstrated cognitive ability and achievement motivation to be significant predictors of adaptive performance. However, the results (Pulakos et al.) also suggested a need to examine the usefulness of these traditional predictors by specific job given the differing adaptive performance requirements each job entails.

<center>Career Development and Baby Boomers</center>

With the advent of modern medicine and improvements in health, nutrition and general wellness, the life expectancy for individuals has increased significantly. A general misconception about aging is that all that is happening is adding years to the end of life. Rather, individuals are not choosing to be old longer, they prefer to be younger or middle age longer. Associated with this is a healthy life with a balance between work, family and leisure. Today, futurists are predicting advances in drugs, technology, hormone therapy, and stem-cell research may increase a person's life to between 120 and 140 years. It may not be long before age 65 is an extremely young age at which to retire (Dychtwald, 2005b).

As baby boomers age, they are setting new trends. Rather than thinking of their career in decline, and beginning to retreat and withdraw, studies show baby boomers are looking to

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reinvent themselves by reevaluating their lives, searching out new opportunities and considering new options. They are becoming empowered by their wisdom and experience and willing to take risks as they pursue different courses in their life. Baby boomers are reinventing the concept of "middle age". In effect, "Middlescence" or an older and wiser version of adolescence is appearing and taking root (Dychtwald, 2005b).

As baby boomers think of either returning to or remaining in the workforce well past normal retirement, they observe many prominent examples pioneering the way as they demonstrate the value and agelessness of continuing their careers. Alan Greenspan, Chairman of the Federal Reserve Board is 78, respected investor Warren Buffet is 75, Frank Lloyd Wright designed the Guggenheim Museum in New York City at the age of 91, John Glenn returned to space at age 77, Lena Horn remains on the concert circuit at 85, and the list goes on. As baby boomers face empty nests with children leaving home, they will experience liberation as responsibilities are reduced and newfound freedoms emerge. Busy schedules attending to children will be replaced by more time to pursue leisure activities or dive into their careers on a more intense level. Given the size of the baby boomer cohort, business, industry and society must deal with the demands of our most populous generation (Dychtwald, 2005a).

Retirement, as today's generations think of it, did not exist prior to the introduction of Social Security in the 1920s. For the most part, people worked until they died. Given the depression and high level of unemployment, one goal of Social Security was to remove older people from the work force thus creating job opportunities for younger workers. The concept of true retirement and enjoying the "golden years" did not emerge until the 1960s. Concurrently, advances in medicine have resulted in the general population living longer. What baby boomers are experiencing today in terms of the concept of retirement and living a healthier and longer life

has not been encountered by earlier generations. Baby boomers are entering a transitional period

and are breaking new ground in how the later years of life are spent (Dychtwald, 2005a).

As baby boomers transform themselves, they are also changing the rules of how life is

lived. The traditional "linear life" paradigm in which individuals progress through the series of

deliberate life-cycle steps of education, work and leisure/retirement is being replaced with a new

cycle of life steps. The new paradigm appears to be one in which education, work and leisure are

inter-twined with 50-year-old individuals returning to school and 70 year olds starting new

careers. "Rehirement" is being combined with part-time and flex-time work schedules and

organizations will become increasingly faced with older workers competing against younger

workers for jobs in the workplace. Political age wars may erupt requiring totally new ways of

how organizations are run and how individuals adapt to the work place (Dychtwald, 2005b).

The net effect of this process of transformation is a new approach to career development.

Career development is itself subject to rapid change. No longer can it be defined by existing,

traditional career development models (Strate, 2004). Brooks (2002) stated that no longer will

workers remain in a single profession or remain with the same organization throughout their

career. This position is in stark contrast to that experienced by baby boomer parents.

Consequently, this process of ongoing change will require continued adaptation as the individual

adjusts to new organizations, new methods of management, new work groups, different

performance expectations and a host of other factors. Combined with existing theories of

adaptation and other adaptation issues experienced by baby boomers, this suggests a need for

both individuals and organizations to review the process of career development for older workers

in a different, yet to be determined, light. Strate and Torraco (2004) concluded from their study

that older workers are able to adapt to complex work environments and that their ability to adapt

successfully was positively impacted by experiential learning. Older workers will adapt to new career roles. Clearly, both employers and employees are challenged to work together to formulate new career development formulas that enhance baby boomer adaptation to a changing work environment. Human resource professionals will be the critical link in ensuring success.

In summary, as previously discussed, by 2010, the projected shortfall of available workers compared to jobs is over 10 million (U.S. Bureau of Labor Statistics, 2003). As organizations seek to fill positions, they will become increasingly dependent upon baby boomers to satisfy their labor needs. Concurrently, baby boomers remaining in or returning to work will find a work environment experiencing constant change requiring ongoing adaptation. While there is significant research on adaptation, adaptive behavior and theoretical models describing how adaptation occurs, applicable research on how this relates to baby boomers is severely limited. Both organizations and baby boomers will find it necessary to explore new opportunities for reaching common ground as they work to accommodate each other in the years ahead.

Summary

This chapter provided an examination of just how each of these pieces of the puzzle relates to each other while noting the gaps that exist in putting the puzzle together. It further laid the foundation for exploring the process of baby boomer adaptation to a changing work environment and ended with the impact on new concepts of career development.

CHAPTER III

METHODOLOGY

This chapter addresses the methodological issues of the study. It begins with a restatement of the purpose and research questions, discussion of the design, the sampling process, and the method of data collection and analysis. It provides detailed justification of the qualitative approach, utilization of the grounded theory, and dimensional analysis. Finally, the chapter concludes with a discussion of validity and reliability and a summary of key points with relevance to the field of human resource development.

Restatement of Purpose and Research Questions

This study was designed to explore and analyze the experiences of baby boomers in adapting to their work environment. The goal was to understand how baby boomers have adapted to a changing work environment by gaining insight into their personal experiences using naturalistic inquiry. The study focused on two areas: (1) baby boomers' perceptions of their adaptation process in a changing work environment, and (2) factors that influenced their adaptation. The following two broad questions guided the investigation.

1. How do baby boomers perceive their adaptation process in a changing work environment?

2. What factors influenced baby boomer(s) adaptation?

Rationale for Qualitative Approach

To gain an in-depth understanding of the phenomenon of baby boomer adaptation, I adopted a qualitative design. Limited research has been done to identify factors influencing baby boomer adaptation to workplace change leaving this vital area virtually unexplored. More specifically,

there is a need to clarify the best predictors of adaptive performance (Griffin et al., 2003; Yeatts et al., 1999; Yeatts et al., 2000).

According to Denzin & Lincoln (2000),

Qualitative research involves the studied use and collection of a variety of empirical materials—case study; personal experience; introspection; life story; interview; artifacts; cultural texts and productions; observational, historical and interactional, and visual texts— that describe routine and problematic moments and meanings in individuals' lives. (p. 3)

Qualitative research is a process involving the collection of varied empirical data that richly describes personal experiences and introspections, seeking to understand, and studying to interpret meanings. It views the nature of reality based on how individuals create their social experience and give it meaning (Denzin & Lincoln, 2000). Because the purpose of this study was to explore and analyze the experiences of baby boomers to identify factors influencing adaptation, naturalistic inquiry was used to gain participant insights. This approach permitted me to ask why and how questions to gather needed information.

Various researchers have provided lists of characteristics of qualitative research and while each may possess his own thoughts, there is agreement on general overall characteristics. The list of common characteristics of qualitative research includes: (1) research takes place in a naturalistic setting involving naturalistic inquiry, (2) research is humanistic and interactive, (3) the researcher serves as the instrument, (4) the process is emergent versus prescribed and preconceived, (5) data is interpreted through a personal lens, (6) reasoning is primarily inductive, (7) sampling is purposeful, and (8) the data collection and representation are descriptive (Creswell, 2003; Lincoln & Guba, 1985; Patton, 2002; Rossman & Rallis, 1998).

Naturalistic inquiry is informal, spontaneous, interactive, moderately non-directive and semi-structured. The goal is to provide data on complex behaviors without the imposition of a priori categorization that may limit the exploratory process. This is in contrast to structured interviewing during which exact codable data is gathered to explain behaviors within predetermined categories. Each participant has his own complex social history and perspective of reality. Therefore, there is no predetermined direction as the process naturally develops (Denzin & Lincoln, 2000). Given the goal of developing theory from collected data, the naturalistic inquiry tool of semi-structured interviews best served the purpose of my study.

Qualitative research employs a variety of designs that assist the researcher in dealing with processes and meanings as well as the understanding of a central phenomenon in a manner that is not quantitatively assessed (Creswell, 2003). Grounded theory, as a primary qualitative approach, is a methodological outgrowth of phenomenology initially used in sociological research (Glaser & Strauss, 1967). Grounded theory is a general methodology that permits the development of theory from its foundational system of gathering and analyzing data (Tesch, 1990). When conducting studies in areas where research is limited, use of the grounded theory method is advantageous (Stern, 1980).

<div align="center">Design of the Study</div>

Within the qualitative research paradigm, I selected the grounded theory approach in particular. The goal of grounded theory research is to generate or discover a theory that emerges from the analytical study of a phenomenon as it corresponds to a specific situation (Glaser & Strauss, 1967). Such situations are those in which individuals interact, take actions, or engage in some process as it relates to the phenomenon. The research process consists of the collection of data primarily through interviews, field visits, the development of inter-related categories of

data, and theoretical propositions (Creswell, 1998; Glaser & Strauss, 1967).

My study took place in a natural setting and involved interactive and humanistic data collection methods subject to modification as knowledge emerged (Glaser & Strauss, 1967). I used open-ended, semi-structured, in-depth interviews to collect data. Kvale (1996) stated that face-to-face interviews and open-ended questions provide the most in-depth and richest information.

A grounded theory approach was particularly appropriate for this study. Given the paucity of research and theory regarding baby boomer adaptation to a changing work environment, this study involved personal changes that have occurred over the course of a career. For example, as individuals have aged and matured, the manner in which they have adapted to change may have evolved based on prior personal experiences. Those adaptive behaviors may have resulted in patterns that have been personally identified by the participants and either used repetitively or discarded based on perceived levels of successful adaptation. Assessment of those experiences through an exploratory process conducted for the purpose of developing emerging theory was deemed to be most effective for this study.

Grounded theory received its name based on the fact that its theoretical foundation or ground is based on a systematic gathering and analysis of data (Glaser & Strauss, 1967). . Grounded theory methods include systematic inductive guidelines for the collection and analysis of data to support theories that explain the data. The process involves an ongoing collection of data, analysis, interpretation, and refinement of the emerging theory (Tesch, 1990). As participant responses are analyzed, similarities and differences begin to crystallize resulting in theories being generated. The relationship of the data to the theory must be exact. Consequently, there should be no preconceived, prescriptive categories. Therefore, theory

emerges as part of a cyclic process of verification and generation. Emergent design involves determining relationships between data to develop themes that ultimately result in new theories or correlate to existing theories (Glaser & Strauss, 1967).

In grounded theory, individuals are viewed as social beings and a key component of the design is dimensional analysis. Dimensional analysis is an interpretive inquiry methodology that assumes human understanding is constructed, contextual and grounded in personal perspectives (Benson & Holloway, 2005). Developed by Leonard Schatzman (1991), the method focuses on maintaining a high level of methodological freedom and creativity in the collection and analysis of data. Given the complexity of human behavior and perspective, the method applies an explanatory matrix that integrates perspective and context. By using more open-ended questions, the research is greatly diffused resulting in a broad conceptual foundation from which to work.

Dimensionalizing or categorizing is the process of taking observed data and transferring it to the abstract representation of an event or situation prior to determining its relevance to a concept (Kools et al., 1996). This process ultimately leads to broader range of dimensions to be identified (Benson & Holloway, 2005). Dimensional analysis is a process of categorizing data using inductive and deductive reasoning to define core categories. As the core categories or ideas are identified, ongoing comparative analysis occurs to confirm or disconfirm relationships between the categories and their components. This process continues until such time as no new relationships or insights are determined (Schatzman, 1991; Wells, 1995).

The primary component of dimensional analysis is the explanatory matrix. The explanatory matrix provides the framework that allows identification, explanation and articulation of relationships within dimensions to occur and consequent theories to emerge. The explanation aspect explores how relationships occur between people, places, events and things while the

process of articulation contextualizes the data (Benson & Holloway, 2005; Kools et al., 1996; Schatzman, 1991).

Benson and Holloway (2005) noted, as data is articulated, the "matrix contains a dominant perspective/dimension, conditions, action/process, and consequences" (p. 120). A dominant perspective consists of a sole dimension whose characteristics are so strong that other dimensions fit within the dominant perspective. Conceptually, it is a categorical silo in which weaker dimensions fit to provide a well-organized picture of the relationship. A hierarchy of dimensions is established with strong explanatory power. All dimensions that create value are included in the matrix while those dimensions that may not provide value to the research may be discarded (Benson & Holloway, 2005; Kools et al., 1996).

As participants tell their story and provide data, conditions are identified that clarify how and when perspectives relate to each other. Conditions are the primary contextual reference points for actions and consequences. "Actions and consequences are inextricably linked to these conditions and provide the explanatory logic for a grounded theory" (Benson & Holloway, 2005, p. 120). All data, perspectives/dimensions, conditions, actions/processes and consequences must be aligned. If not, the process continues and is refined until such time research criteria are satisfied (Schatzman, 1991).

Sampling Procedures

Theoretical sampling is a principal component of grounded theory utilizing comparative methods for identifying and developing emerging categories. Theoretical sampling is defined as "the process of data collection for generating theory whereby the analyst jointly collects, codes and analyses his [sic] data and decides what data to collect next and where to find them, in order to develop his [sic] theory as it emerges" (Glaser & Strauss, 1967, p. 45). Theoretical sampling

allows the comparison of abstract concepts highlighting potential properties and dimensions when they are not readily apparent to the researcher. Theoretical sampling helps define conceptual boundaries that aid in the categorizing process, categorical properties, relevancy to their context, conditions in which they occur, and ultimate consequences (Denzin & Lincoln, 2000; Strauss & Corbin, 1990).

Data collection is directed by theoretical sampling that is based on theoretically relevant constructs. The process is one of refinement as it proceeds from the use of an open sampling method of identifying individuals, objects or documents to a more systematic relational or variational sampling that confirms relationships between categories. A final process involves discriminate sampling which involves the deliberate and directed selection of individuals, objects or documents (Strauss & Corbin, 1998).

The theoretical sampling involved the use of theoretical comparisons gaining insights based on personal knowledge or literature reviews (Strauss & Corbin, 1990). Consequently, my use of the process involved the exhaustive collection of data from the participants to enhance the ongoing analysis, categorical comparisons and refinement of the theories (Denzin & Lincoln, 2000).

Determining sample size in qualitative research is based on a variety of factors (Sandelowski, 1995). For example, a sampling size may be either too large or too small depending upon the purpose of sampling and the research to be completed. Sample sizes may be too small to justify claims of redundancy (Lincoln & Guba, 1985) or saturation (Strauss & Corbin, 1990). Conversely, in qualitative research, sample sizes may be too large resulting in claims that in-depth analysis of rich data cannot be realistically achieved or peculiarities or idiosyncrasies discerned (Sandelowski, 1995). Given the purpose of my study to complete an in-

depth analysis of individual experiences, I determined the utilization of a sample of 10 would satisfy the study's informational needs.

The sample consisted of 10 baby boomers who met the following criteria of (1) being a male or female born between January 1, 1946 and December 31, 1964, (2) being employed in the health care industry, and (3) holding a position as a middle manager. My goal was to include both men and women members of the cohort. The sample field was narrowed the field to include middle managers in healthcare. Middle managers play a vital role in organizational decision making and healthcare represents a field of interest of particular importance to the researcher. Recruitment involved asking professionals known personally to me to identify potential participants who met the criteria for the study. The selection of a specific work group within a specific industry constitutes a method of purposeful sampling (Merriam, 2002). The reasoning for selecting this group is based on my personal interest as an executive in the health care industry recognizing that middle managers play key roles in assisting employees with adaptation in their work environment. While the goal of such research is to increase knowledge, extend theory, and improve practice, the issue of limited generalization must be considered given the context of the boundaries (Merriam, 2002).

Data Collection

For the purpose of data collection interviews and observations were the primary methods used to gather data. The essence of observation is field notes which were used to compliment the interview process.

Interviews

Individuals identified by the solicited organizational human resource professionals were provided with a Letter of Introduction (Appendix A). The letter contained the purpose,

procedure and confidential nature of the investigation. Using the letter, interested individuals

contacted the researcher to obtain further information or to request participation in the study.

The names of individuals agreeing to participate in the study, regardless of whether they were

selected or not selected to participate, were kept confidential. Their names were not shared with

the human resource professionals from the organizations in which they were employed.

Upon receipt of the names of interested participants, a random drawing of 10 individuals

was conducted. Arrangements were made by me to (1) send the participant the informed consent

letter (Appendix B) for signature, (2) have the participant complete a demographic data sheet

(Appendix C), (3) schedule the first interview, and (4) address any questions or concerns.

Within one week of the letter being sent, I contacted selected participants to confirm receipt

of the letter and determine interest in participating in the study. At that time, arrangements were

finalized to sign the informed consent letter, complete the demographic data sheet, verify

participants met sampling criteria and initiate the interviews.

Face-to-face individual interviews were used as the primary source of data collection.

Interviewing is a conversation with a purpose (Dexter, 1970; Lincoln & Guba, 1985). Among

those purposes are obtaining here and now constructions of individuals, reconstructions of past

experiences, and projections of the future. Interviews range from very structured to unstructured

with semi-structured in-between (Denzin & Lincoln, 2000). In the structured interview, the

problem has been defined and questions are developed with the expectation that the subject will

respond within the specific framework of the problem. Conversely, unstructured interviews are

non-standardized and normative responses are not sought while the problem emerges in reaction

to the questions posed. Thus, the unstructured interview focuses on the unique, idiosyncratic and

holistic view of the participant (Lincoln & Guba, 1985) The unstructured interview permits the

researcher to analyze and understand complex behaviors without concerns of a priori

categorization that could hinder the inquiry process. The semi-structured format is somewhat

directive and of particular value in a preset, field environment (Denzin & Lincoln, 2000). This

study utilized the semi-structured approach combining specifically defined questions with non-

specific or defined questions designed to clarify and follow up on individual participant

responses.

Of particular importance is the interviewer's attention to rapport, neutrality and the impact

of the audiotaping the interview. Rapport is vital if openness and honesty are to prevail.

Therefore the interviewee must feel comfortable and relaxed in the presence of the interviewer if

the participant is to be self-disclosing and in-depth data is to surface. Neutrality is essential if

contamination of the data is to be avoided and bias is to be minimized (Denzin & Lincoln, 2000).

My desired approach was to be facilitative and neutral while creating a non-threatening

environment in which the participant felt comfortable and open to sharing personal experiences.

Interviews were audiotaped to heighten the accuracy of participant responses. Audiotaping

helps provide a fuller context of an interview by recording non-verbal aspects such as inflection

and tone. It also permits the interviewer to listen more intently than be distracted through

exhaustive note taking (Kvale, 1996). It is important to note that research suggests tape

recording interviews contributes to interviewee nervousness and a sheltered tendency to be less

open. Once an individual speaks and his comments recorded, it is perceived as out and cannot be

taken back. To the extent tape recording may hinder interaction must be taken into

consideration, and it is vital that the interviewer reassure the individual that the recording will

remain anonymous and confidential (Seale, Gobo, Gubrium & Silverman, 2004). As I

interviewed participants, I was sensitive to concerns they expressed about being audiotaped and

reassured them that their privacy and confidentiality would be maintained within the scope of IRB guidelines.

The interviewing process consisted of two audiotaped, semi-structured, open-ended interviews with each participant. The first interview lasted up to 60 minutes followed by a second interview of approximately 30 minutes completed at a later date. Approximately two weeks prior to the first interview, participants were provided with a demographic data sheet to be completed. A written list of the primary questions (Appendix D) was also provided. Participants noted this time saving measure greatly enhanced the interview process by allowing for preparation and improving the quality of their responses during the first interview. All interviews were conducted at the convenience of the participant in a setting of their choosing. Within two weeks of each interview, participants were provided with a copy of the transcribed interview. Each was asked to review the document for the purpose of checking accuracy and providing feedback. Upon completion of the review, participants were asked to verify the documents acknowledging their authenticity.   This process also contributed to the process of enhancing rigor and credibility.

This study utilized an open-ended interview guide (Appendix D). A semi-structured approach was used combining somewhat direct questioning in the preset field. The preset field is defined by the setting agreed upon by the participant for the interview. My role, as the interviewer to collect information on the phenomenologically based topic of adaptation. All interviewees were asked the same open-ended questions in which respondents were free to choose how to answer the question. Probing questions were asked to help clarify my understanding of their answers. This approach helped facilitate interviews that could be more easily analyzed and compared on a consistent basis. Particular attention was focused on

addressing issues of behaviors, opinions, and factual knowledge while noting feelings that were associated with particular situations. "Why" questions were specifically avoided to prevent respondents from feeling defensive and needing to justify a response (Patton, 2002). However, during the analysis process "why" indicators were sought out for analysis.

Observations

For many qualitative researchers, field notes represent the essence of their study. Emerson (2001) stated, "they emphasize writing detailed field notes close to their field observations, mining these notes systematically through qualitative coding techniques, and producing 'grounded' analyses tied closely and specifically to the original field note corpus" (p. 355). In this sense, I placed an extremely high value on the field note as a secondary source of data as I transformed observed events into written accounts.

Other researchers suggest that using field notes is a secondary process that involves taking too much time to write too much information resulting in the researcher being unable to intuitively and totally experience the situation at hand. From this perspective, the emphasis is on recording specific events versus becoming saturated in the experience (Emerson et al., 2001; Mulhall, 2003). Therefore, it is necessary for the researcher to determine a purpose and a strategy for recording data.

In my study, the purpose of the field notes was to compliment the interviewing by collecting data that helped with the description and interpretation of the participants' responses. As Mason (2002) suggests, field notes may serve as a "developmental device" that fosters understanding as well as a platform from which to document "hunches" (p. 98). The notes served as an opportunity for me to record themes and patterns, and any other information that might shed further light on and support the audiotaped interview. While the focus of my purpose was literal

and interpretive, reflexivity also played a vital part of the overall process. Each approach further stimulated thought regarding other ideas, potential themes, and areas to be explored. For example, while participants frequently mentioned the work "flexibility" in their interviews, their attempts to define the word were often abstract and related to specific situations. While reviewing individual responses literally, it was also necessary to interpret meaning when developing themes. As each participant responded somewhat differently to the interview guide questions, it was necessary to reflect back to previous answers given in different interviews to clarify areas and explore common themes. The process was one of ongoing interpretive refinement.

Field notes were also used to document observed behaviors demonstrated by the participant and myself. I also recorded personal feelings I experienced and the circumstances under which they arose. For example, the potential existed for a participant's situation, in which some perceived injustice occurred, could have pushed a personal hot button that might have potentially influenced how I interpreted data. Follow up action would have been necessary during the second interview to ensure the accuracy of the data gathered to eliminate potential bias or interpretation contamination.

<div align="center">Data Analysis</div>

Grounded theory methods focus on the process of data analysis using extensive amounts of rich data obtained from a variety of sources including interviews, observations, conversations, public records, reports, participant diaries, journals and personal reflections (Denzin & Lincoln, 2000). Data appears in words instead of numbers thus requiring a different approach to analysis. Generally, the process consists of three distinct and concurrent activity flows: data reduction, data display and drawing and verifying conclusions (Miles & Huberman, 1984).

Data reduction is a process involving the selection, highlighting, simplification, abstraction and transformation of raw data from field notes. It is a process that is ongoing and continues throughout the study until the final report is completed. It involves the organization of data so that final conclusions can be expressed and justified. Occasionally, data reduction occurs prior to data collection as the researcher anticipates conceptual frameworks. As the process moves forward, steps including coding, development of themes, developing clusters and writing memos take place (Miles & Huberman, 1984).

Data display provides an organized compilation of information that allows the researcher to begin understanding what is happening and develop alternate courses of action while drawing conclusions. The most common display form in qualitative research is narrative text normally derived from field notes. The process involves taking the reduced data and transforming it into matrices, charts, and graphs that provide the researcher with a clearer picture from which to progress with the analysis or help justify conclusions. The key is to avoid the human tendency to take complex information and over-simplify the reduction process into neat boxes that sound and look good but miss the point (Miles & Huberman, 1984). A data collection and analysis matrix is provided (Table 1, p. 72) which lists the specific questions asked, data collection methods and types of analyses used to conduct investigations.

The third stage of analysis involves drawing conclusions and verification. As the researcher searches for meanings, he notes regularities, patterns, reasons for things happening as they do, possible causal flows, and propositions. The process moves from the general to the specific and from vague to clear. As conclusions are made, so must verification as the analysis continues. This particular step was extremely vital because as the meanings emerged, confirmation took place to enhance credibility, rigor and ultimately validity (Miles & Huberman, 1984).

Each of these steps or activity flows took place concurrently throughout the study. The researcher moves interactively, using a fluid process that combines well-defined methods with flexibility to address and pursue areas of interest as they arise. In this study, for example, while coding data on flexibility, new ideas developed that required additional research and data reduction. As the data was entered into the matrix, initial conclusions were made that resulted in the need to further test and verify those conclusions. Ultimately, the key is a clear and well-written documentation and audit trail that assists with the replication process (Miles & Huberman, 1984).

In this study, I collected data using semi-structured interviews, data collection sheets and field notes. Memos and reflective journals were used to assist with data analysis. I used different the open, axial and selective coding methods as prescribed by dimensional analysis to help develop themes that could be examined at both the most abstract and concrete levels. Additionally, these tools were used to document the dimensions and the interaction between the dimensions (Benson & Holloway, 2005). As the process progressed from the concrete data to higher levels of abstraction, multiple dimensions were identified from the interviews (Schatzman, 1991).

Line by line open coding was used to break down, analyze, compare, and categorize the data. Data, including quotations, specific words incidents or events were labeled and grouped together via constant comparison to form categories and properties. In this study, I used a multiple coding protocol, where key words and mentions represented more than one concept category. Throughout the process, the data from each interview was compared to dimensions developed in the prior and subsequent interviews. This process of dimensional analysis helped to make the categories and themes more dense, complex and precise by recognizing the

complexity of an account and the possibility of multiple meanings of a single phenomenon (Schatzman, 1991; Strauss & Corbin, 1990).

Axial coding represents the delineation of hypothetical relationships between categories and subcategories and was used to develop and present descriptions, themes, and assertions (Strauss & Corbin, 1990). Axial coding was also used to examine content analysis to identify adaptation categories and themes. As themes and patterns became more clear and refined, distinct adaptation categories became more obvious further permitting the effective organization of information from the collected data. This process added further depth and integration to the dimensions resulting in more well developed matrices that permitted a visual display of dimensional relationships (Benson & Holloway, 2005).

Finally, selective coding, the process by which categories are related to the core category, was used for the basis of the grounded theory (Strauss & Corbin, 1990). It focused on reappearing codes to help sort large quantities of data. To help synthesize and explain the data, the conditional matrix was used to map conditions and consequences as they pertained to the categories (Schatzman, 1991; Strauss & Corbin, 1990).

Memo writing was a critical step that occurred between coding and formalizing a draft of the completed analysis. It was a process that helped to stimulate thinking and hypothesizing categories, properties and relationships in new ways. If grounded theory methodology assumes that the theory is hidden in the data, and coding enables us to see it, memo writing is the bridge that links the categories. Memos served as a guide to collecting more data, examining codes for substance and ultimately to this researcher's analysis of the participant's reality (Denzin & Lincoln, 2000; Dick, 2005).

In summary, I used the following steps for data analysis. First, I collected data through participant interviews that were conducted, audiotaped, transcribed and verified by the participants for accuracy. Data was also collected using the demographic data sheets and field notes. Second, using a combination of 3 x 5 cards and more extensive narratives, I wrote memos and kept a reflective journal to record notes on processes, assumptions and actions. Third, through the coding process, I organized participant responses by categories. The constant comparison process was initiated and dimensional profiles and conditional matrixes developed to enhance the data analysis. Fourth, all categories were examined and reduced to determine emerging themes. Finally, I used a process of sorting through the 3 x 5 cards and memos to better organize and provide order to the structure of the study. Those themes that emerged from the data analysis process are: (1) flexibility, (2) ability and willingness to learn, (3) attitude, (4) understanding and working with a diverse workforce, (5) coworker and family support, and (6) ability to function in an evolving organizational structure.

Figure 2 (Dick, 2005) provides a diagram of the over-lapping processes that occur in a grounded theory study. It provides in picture form, a snapshot of the steps taken throughout this study. It should be noted that the interview and field note process occur concurrently while the coding and memoing steps overlap. Next the sorting of the data occurs with the final step of writing taking place.

```
┌─────────────────────────┐
│     Data collection     │
├─────────────────────────┤
│       Note taking       │
│  ┌─────────────────────┐│
│  │       Coding        ││
│  │  ┌─────────────────┐││
│  │  │     Memoing     │││
└──┼──┼─────────────────┼┴┘
   │  │  ┌──────────────┼──────┐
   │  │  │   Sorting    │      │
   └──┼──┼──────────────┼──┐   │
      │  │  ┌───────────┼──┼───┼───┐
      │  │  │           Writing    │
      └──┴──┴───────────┴──┴───┴───┘
```
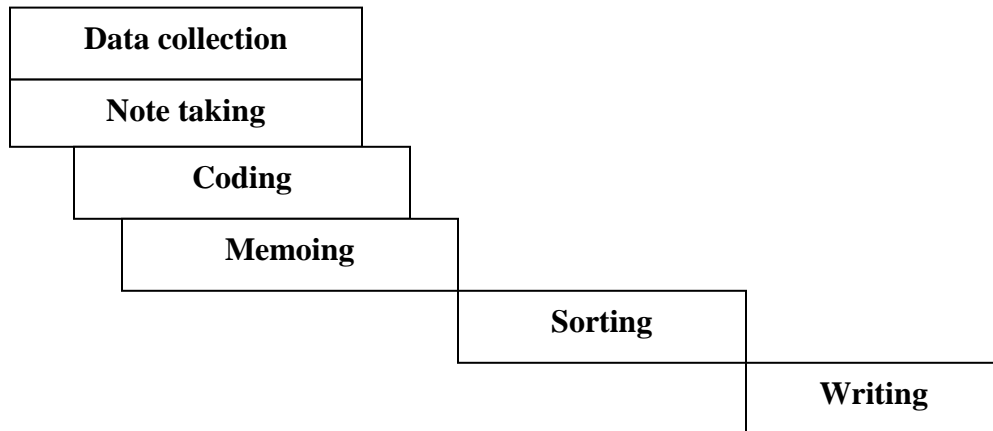
Figure 2: Grounded Theory overlapping process (Dick, 2005)

The Role of the Researcher

Denzin and Lincoln (2000) discussed the role of the researcher as critical to the success of the research process. The researcher creates the environment through which interaction occurs, data is collected and then analyzed. It is essential that the researcher be able to take gathered data, make empirical assertions and report it in writing backed by evidence from the various methods of collection. Concurrently, the researcher must interpret the data, frame key findings and formulate theory.

Denzin and Lincoln (2000) argued that we have become an interview society in which it is taken for granted that useful information can be generated, experiences assessed and meanings determined. However, research interviewing is a far more sophisticated process in which both skill and art are combined to ask questions and effectively listen. Interviewing is a tool that generates understandings relevant to specific situations. It can be influenced by the interviewer based on his personal characteristics to include race, class, ethnicity, gender and a variety of other factors. The researcher must be able to communicate the role he plays in the process, his

biases, his relationships with participants, and clarify his philosophy and any other issues that may impact his credibility (Denzin & Lincoln, 2000).

I am an HRD professional and, like other HRD professionals, I , like other members of the workforce have found it necessary to adapt to the changing work environment. Baby boomers, as a cohort, have experienced revolutionary changes in computer technology, methods of communication and travel, delivery of health care resulting in living longer, socio-economic related values and political idealism, methods for conducting business, ideas about personal well-being and living and the list goes on. With every change comes the requirement to adapt to something new or different. Nowhere than in the work place is this most evident. It is within this context, both as a baby boomer and as the researcher, I must work.

In the next decade, as a baby boomer and an HRD professional with over 30 years of experience, I will be personally required to confront the issues of others like myself in adapting to a changing work environment. Given projected demographic data, baby boomers will comprise a major portion of the overall labor pool. Given the difficulties all workers have adapting to change combined with this significant portion of the population with which I must work, understanding how baby boomers adapt and developing programs and systems to assist with that process will become imperative if I am to be successful. As the researcher, I had to be cognizant of the subjectivity and biases influencing me in this study.

Having personally experienced the need to adapt to a changing work environment, I focused on being sensitive to the following:

1. The use of a qualitative versus a quantitative design has a few inherent disadvantages given my status as a baby boomer and HRD professional who is involved on an ongoing basis with assisting individuals to adapt to their work environment. While

some researchers might argue that a quantitative approach might have increased the validity and reliability of the findings, a qualitative approach provided a plethora of rich data. My background and experience proved beneficial to the research process.

2. As data was gathered, I worked to ensure I did not read into a situation more than what was actually there.

3. Descriptions of experiences may occurred in which I could totally associate, empathize and sympathize. In some instances, I agreed or disagreed with how a personal situation was handled or the degree to which successful adaptation occurred. However, I did not permit my personal biases to interfere with individual perceptions and realities that could have potentially impacted findings and conclusions.

4. There were situations in which I personally identified factors influencing work adaptation that did not emerge in this study. I recognized that what has worked for me might not have worked for others. Pursuit of those factors could have inappropriately biased the study to confirm my own assumptions when those assumptions might not be valid.

One assumption of this study was that participants would be able to provide authentic accounts of their experiences and would be capable of synthesizing those experiences into information that was pertinent to the study. The use of volunteers from varied organizations had the potential to inject possible bias into the study. Past personal experiences may have been either positive or negative or both resulting in a contamination of objectivity. In my role as the researcher, I facilitated I executed grounded theory guidelines to accurately portray individual experiences and carefully recorded information that influenced interpretation and contributed to the rigor and credibility of the study.

In summary, my role in this study was exciting given the opportunity to contribute to both my generation and profession. However, it was essential to become familiar, in advance of the study, with the potential pitfalls a researcher may experience that can influence the research process and the findings of the study. For example, as the researcher, my embeddedness as both the researcher and a baby boomer created opportunities to encounter potential pitfalls that could have influenced the outcome of the study. However, being aware of, and sensitive to, the potential issues discussed permitted planning and accounting, in such a manner, as to ensure the validity and reliability of the study were maintained.

Ethical Considerations

It is obligatory that the study be conducted ethically. In a qualitative setting, in addition to gaining informed consent, it is essential that the researcher review his personal style and interview practice to ensure that he has a basis for judging what is ethical and what is not, and can justify positions taken within the context of acceptable rules (Mason, 2002). Further, the researcher must consider, in advance, that questions may involve responses that are considered personal or private, which, in this study, might include the loss of a job, the resulting impact on the individual, home, and family (Mason, 2002).

As the relationship builds between the participant and researcher, the participant may reveal more personal information than what the researcher needs to know. Even though probing questions may not be asked, the participant may reveal sensitive information that moves the process more toward a therapeutic setting versus a gathering of research data. The goal for rich data must be met with the responsibility for controlling the interview and considering if the information being communicated is ethically appropriate. Where confidentiality and privacy have been promised, the need to protect the participant is paramount. While ethical guidelines

for interviewing are abundant, ultimately, the researcher is responsible for weaving a justifiable path through the maze of potential ethical dilemmas (Mason, 2002).

To ensure the highest level of ethics in my study, strict adherence to IRB guidelines prevailed and all participants were (1) provided with a written description of the study prior to involvement (Letter of Introduction, Appendix A), (2) provided an informed consent letter (Appendix B) which allowed participants to withdraw from the study at any time, (3) ensured their confidentiality and privacy were protected within IRB guidelines, (4) ensured research representation was truthful and forthright, and (5) ensured approved research protocols were practiced.

<center>Rigor and Credibility</center>

Evaluation of rigor in qualitative studies differs greatly from quantitative studies. In qualitative research, one does not have statistical numbers to support findings. There is no established level of significance to provide evidence that something is meaningful. Rather, the researcher seeks out meaning in the data noting repetition and redundancy across lines. Patterns of data are analyzed and threaded to emerging meanings that relate back to the questions. In qualitative research, unique and different perspectives may emerge that may not be in consensus with other previous research. Therefore, rigor is viewed in terms of the role of the researcher and participants, the purpose of the research, and an adherence to the highest process standards in conducting the study (Merriam et al., 2002).

While many consider validity a quantitative term, in qualitative research, it is thought of in terms of description and explanation and ensuring the explanation fits the description. While there is no single way to interpret an explanation, for credibility to exist, the explanation must fit the description (Denzin & Lincoln, 2000). Maxwell (1992) identified three types of validity in

qualitative research and defined validity in terms of being plausible, credible and trustworthy. He argued that qualitative validity could be defended when challenged if these three types of validity were achieved.

The first type is *descriptive validity* that involves the researcher accurately reporting what is observed and heard. The key component is factual accuracy in the statements and this takes place during the initial stage of research when data is gathered (Maxwell, 1992). The second type is *interpretive validity* and involves the researcher accurately understanding the participants' views, thoughts, feelings, intentions, and experiences and interpreting them accurately. Validation is achieved when consensus is reached between the researcher and participant as to the meaning of the experience (Maxwell, 1992). The third type of validity is *theoretical validity* that establishes credibility and defensibility by ensuring the theoretical explanation developed fits the data. In this step, validity goes beyond the concrete and descriptive to a level of abstraction and is achieved through accuracy versus meaning. Maxwell (1992) cautioned the measure of validity in qualitative research given the highly selective, reductive and subjective process involved.

The issue of reliability in grounded theory is equally important as Glaser and Strauss (1968) points out and is achieved via the use of multiple data sources converging on the same phenomenon. As the sample size increases and saturation occurs, the theoretical sampling process systematically leads to a more refined and substantive data base from which to analyze data, triangulate and develop themes. Ultimately, saturation leads to replication. In grounded theory, rigor is reactive to the situation in which the research is conducted. As data is gathered and processed and the theory emerges, so is there an ongoing search for evidence that disproves the emerging theory. As saturation occurs, the theory evolves to more likely fit the situation

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(Glaser & Strauss, 1967).

In this study, the purpose of using multiple sources of data collection such as interviews, field notes, memo writing and a reflective journal was to enhance rigor and credibility through triangulation (Mason, 2002). For example, the field notes helped increase the level of descriptive and interpretive validity by providing a secondary level of data collection. Ideally, the use of multiple methods to investigate the same phenomenon from different perspectives should result in a higher level of interpretive accuracy. Conversely, while research supports the use of triangulation to improve rigor and credibility, arguments have been made against its effectiveness as well. For example, the prevalence of subjectiveness in the qualitative process prevents pure objectivity and, ultimately, can only provide improved odds to support the study. Some researchers suggest this can compromise the reliability and validity of the findings (Mason, 2002). In this study, I chose to use triangulation via my use of multiple methods of data collection to enhance, to the maximum extent possible, the rigor and credibility of the findings.

A reflective research journal was also maintained to provide detailed accounts of how data was collected and categories developed. It also served as an "audit trail" or linear pathway for documenting and mapping actions and decisions (Guba & Lincoln, 1994; Mulhall, 2003). Included in the journal were my reflections, questions, concerns, problems identified, interaction with the data and descriptions of interpretation and analysis. Miriam (2002) noted the importance of journals as a record-keeping device that contributed to the reliability of qualitative research. Journals also help verify that the results are consistent with the data and that the results dependable (Guba & Lincoln, 1994). Combined with noting personal experiences taking place during the interview and memo writing, the field notes played a vital role in contributing to the

reflective journal.

Summary

This chapter discussed in detail the grounded methodology for the study and rationale for the adoption of this qualitative approach. It demonstrated that grounded theory has, since its inception, been accepted as an important research methodology in the investigation of complex social interactions in the social science fields. A good grounded theory is one that is: (1) inductively derived from data, (2) subjected to theoretical elaboration, and (3) judged adequate to its domain with respect to a number of evaluative criteria (Glaser & Strauss, 1967). The chapter further listed the methods or procedures used in the study and provided evidence that appropriate steps were taken to support the grounded theory protocol and ensure rigor and credibility were achieved.

Next the process of data analysis was discussed, including step-by-step procedures of coding, constant comparison, dimensional analysis and how the themes emerged. It further explained the role I played as the researcher, the selection of participants and the data collection process. I examined the use of demographic data sheets, field notes, memo writing and the reflective researcher journal. An in-depth review of the interviewing process was explored and included concerns that the researcher must take into consideration such as the need to be sensitive to individual feelings about being audiotaped. Finally the chapter concluded with discussions of ethics and issues related to validity and reliability.

Table 1:

Research Questions: Data Collection and Analysis Matrix

Interview Questions	Data Collection Methods	Items	Data Analysis
(1) How have changes in the Workplace environment affected you?	Data Sheets Interviews Field notes, Memos, Journals	All All All All	Descriptions/themes Content analysis Descriptions/themes/ actions/decisions
(2) How have you adapted to those changes?	Data Sheets Interviews Field notes, Memos, Journals	All All All All	Descriptions/themes Content analysis Descriptions/themes/ actions/decisions
(3) How do you perceive the adaptation process in a changing work environment?	Data Sheets Interviews Field notes, Memos, Journals	All All All All	Descriptions/themes Content analysis Descriptions/themes/ actions/decisions
(4) What factors have influenced your adaptation?	Data Sheets Interviews Field notes, Memos, Journals	All All All All	Descriptions/themes Content analysis Descriptions/themes/ actions/decisions
(5) What factors do you believe are most vital to successful adaptation to a changing work environment?	Data Sheets Interviews Field notes, memos, journals	All All All All	Descriptions/themes Content analysis Descriptions/themes/ actions/decisions

CHAPTER IV

RESULTS

This chapter provides a detailed description of the participants using the demographic data sheets and information obtained during the interviewing process. The chapter also includes interpretive accounts of the participants' experiences providing insights into perceptions of the adaptation process in a changing workplace, as well as, identifying those factors influencing adaptation. Those factors emerging from the data are: (1) flexibility, (2) ability and willingness to learn, (3) attitude, (4) understanding and working with a diverse workforce, (5) coworker and family support, and (6) ability to function in an evolving organizational structure.

This chapter is formatted to present the findings in both table and narrative forms. The factors are itemized with identified sub-themes using the direct quotes of participants, field notes, memos and journal entries as the support mechanism.

Description of the Participants

The sample consisted of six female and four male baby boomers who met the following criteria of (1) born between January 1, 1946, and December 31, 1964, (2) being employed in the healthcare industry, and (3) holding a position as a middle manager. Eight of the participants are located in Florida, one in New York, and one in Connecticut. Participants were given a fictitious name to protect their identity. Those names are listed in Table 2 (p. 74) Profile information was provided through the demographic sheet (Appendix C). Table 2 provides a participant profile summary of the data collected on the demographic data sheet. Following the table is a detailed and in-depth description of each of the participants.

Participant Information

Table 2

Participant Profile Summary

Demographic	Participant									
	1	2	3	4	5	6	7	8	9	10
	Aij	Christie	Myles	Asher	Maria	Sol	Alan	Holly	Peggy	Alice
Gender	F	F	M	M	F	M	M	F	F	F
Age	54	50	54	55	50	53	47	49	59	51
Race	W	W	W	W	W	W	W	W	W	W
Years worked in healthcare	30	30	17	15	20	31	17	8	16	20
Years in management	24	23	32	24	15	9	17	26	15	18
Non HS Graduate										
HS Graduate				X						
Some College										
2 Year Degree					X	X			X	
4 Year Degree			X					X	X	X
Grad Degree	X	X					X			
# of Careers	4	5	3	4	2	4	2	4	7	4

Aij is a 54-year-old white female nursing home administrator with extensive experience in both union and non-union environments. Her undergraduate degree was in physical education, however, she learned early on that her heart was in the healthcare field. She pursued a graduate degree in healthcare administration and while serving as an administrator in New York, she also served as a county commissioner. She moved to Florida seven years ago and has been in her current position for three years.

After approximately 15-minutes of chatting to permit grounding to occur, I reviewed the purpose of the study and format of the interview process. This period of time was not recorded and she was offered the opportunity to ask questions or express concerns. It was interesting to note, as an experienced professional with years of corporate and public experience, she was somewhat anxious about the taping of the interview. She stated that it had nothing to do with confidentiality or privacy and really could not identify why she was uncomfortable. She assured me, however, that she wished to continue with the recording and it was obvious that she became increasingly comfortable as the interview progressed. The recorded portion of the interview lasted approximately 40 minutes.

Christie is a 50-year-old white female director of a home health department in a large retirement community. Her careers have included being a registered nurse, a nurse practitioner and a marketing manager at various hospitals and healthcare facilities in New York and Florida. In her current position, she oversees a staff of 100 employees. Using the same format, the introductory portion lasted about 10 minutes while the recorded session lasted over 45 minutes.

Christie was bubbly and energetic in her responses. She was excited about being a participant and considers herself a researcher based on her nursing background. She was well grounded, comfortable and has an interest in this type of research and said it reminded her of her

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days in psychiatric nursing. Our dialog was much more open as she was very communicative and interactive.

Myles is a 54-year-old white male assistant director of a food services department in a large retirement community. With over 130 employees in his area, he helps oversee four different dining venues serving an average of 45,000 four-star rated meals per month to individuals living independently, with assistance and in skilled nursing. Of particular interest is that this participant is legally blind and is highly respected and regarded as an outstanding performer who has not let his disability be an obstacle to his accomplishments. He does not view himself as handicapped but rather as someone who has adapted to his overall environment with great success. Not known for being shy, he answered his questions with enthusiasm and thoughtfulness.

Asher is a 55-year-old white male who oversees a maintenance department of 27 staff. In today's environment where a bachelor's degree in engineering is normally expected and required, this participant began his career in the military and has continued to focus on self-learning and over achieving to further his career goals. He has functioned in a variety of managerial levels ranging from front-line supervisor to corporate executive. He prefers mid-level management and feels more comfortable working in the field. Recognized as a deep thinker and one who reflects, he is considered a workaholic who is totally committed to his job. His answers were far more scholarly in content, and it was obvious he had spent time preparing for the interview process.

Maria is a 50-year-old white female nursing coordinator at a large assisted living facility who oversees and directs the activities of nearly 30 caregivers. Having started her career as a Licensed Practical Nurse, she recognized early the opportunities for career growth in the nursing

field. She pursued her dream of becoming a registered nurse by graduating from a two-year

college nursing program. Since that time she has held numerous charge and supervisory

positions eventually being elevated to the position she now holds. As a nursing coordinator,

Maria must deal with a variety of issues requiring ongoing adaptation. Responsibilities include

supervising nursing staff, providing clinical care services to individual residents and comfort to

families. She also coordinates support services, including food service, maintenance,

housekeeping, activities and transportation. She came to the interview well prepared with notes

and answers based on the Interview Guide previously distributed. She stated she was excited

about the opportunity to participate in the study.

Sol is a 53-year-old white male registered nurse staff development coordinator in a large

skilled nursing facility. He has enjoyed a varied career as a musician, electrician foreman, staff

nurse, nurse manager and Assistant Director of Nursing. His healthcare career spans 31 years

with the last nine years in management positions. His responsibilities include overseeing nursing

staff including orientation, training and assisting employees with growth and development. He

was extremely laid back and low key and continually reflected back on his career and how it had

evolved. Unlike the other managers who seemed to discuss issues from both employee and

manager perspectives, Sol presented information that was more neutral. However, his answers,

for the most part, remained consistent with other participants.

Alan is the department chair for the Human Performance Department in the College of

Health Professions at a state university. A 47-year-old white male with his doctorate, he has

been in the healthcare field as a manager for 17 years. In his current position, he supervises the

department's faculty as well as serving as a mentor for the students in his program. Alan

expressed a keen interest in the topic as he views one of his responsibilities as teaching his

students to be able to treat and deal with baby boomers psychologically as well as physically. As a baby boomer himself, he sees the need to prepare students with the people skills that will be needed to work with this age group if they are to be successful in their careers. He prepared for the interview and found himself expanding on his answers and going in new directions as he gave more serious and enlightened consideration to what he was saying.

Holly is a 49-year-old white female with a bachelor's degree who is a practice manager for a small family owned physical therapy practice. She has traveled extensively and has enjoyed a varied management career in small to midsize organizations in the retail shoe, banking, automotive wholesale and medical industries. For the last eight years, she has worked in the medical field supervising a small staff helping the business achieve dominance as the premier physical therapy practice in central New York.

Holly was initially nervous and concerned about her ability to provide input for the study that would be worthy and credible. Time was taken to discuss the importance and value of rich research data from a variety of venues and the need to consider experiences and perspectives from individuals with diverse backgrounds. This discussion resulted in her gaining confidence that led to a lively and fun conversation that provided interesting perspectives. Perhaps most noted was her belief that she had not really considered herself as a baby boomer but as an individual who is, age wise, a generation behind baby boomers. She noted "I guess I don't always think of myself as a baby boomer although I guess I'm at the end of it. I feel like there's a lost generation separating the first baby boomers from me because I'm not, you know, we have different music and we had different education and just a lot of stuff changed in just those ten or 12 years from the first of the baby boomers anyway." The significance of this statement may

very well be indicative of a generation whose age range spans 15 years and suggests a need for alternative approaches to future studies.

Alice was an eager participant who was extremely interested both personally and professionally in this study. A 59-year-old female, she has spent the last 16 years as a Director of Nursing in various nursing homes in Florida, New York, and most recently Connecticut. She is an energetic leader who has been a guest speaker for the Florida Directors of Nursing Association on tort reform as well as being a Certified Risk Manager. She obtained her Bachelors Degree in History and returned to college later in life to complete an Associate's Degree in Nursing. She gave careful consideration to the topic and brought prepared notes to the interview. Her perspectives from personal experience, observations of those she has supervised and thoughts on how organizations contribute to the adaptation process were enlightening.

Peggy is a 51-year-old female healthcare professional and Human Resources Director whose career has spanned over 20 years. She possesses extensive HRD experience in both the healthcare and elder care settings, as well as in large national corporations and smaller institutional organizations. In her current position, she supervises one other HR staff member servicing over 200 employees.

Peggy demonstrated a high interest in the topic of factors influencing baby boomer adaptation to a changing work environment based on her own professional needs as well as personal desire for more information. She clearly expressed the importance of baby boomers in helping to address many of the employment shortage issues that are being encountered now and anticipated in the next decade. She noted the need for organizations to develop plans to hire, recruit and retain baby boomers and the need to develop action plans that assist baby boomers with their integration into the organization.

Each of the interviews was transcribed and verified by the participant for accuracy. The constant comparative method of analysis was used on the collected data to give meaning to the semi-structured interviews, data collection sheets, field notes, memos and reflective journals. Different coding methods as prescribed by dimensional analysis were used to help build a theory that could be examined at both the most abstract and concrete levels. As the process progressed from the concrete data to higher levels of abstraction, multiple dimensions were identified from the interviews (Schatzman, 1991). Open coding, axial coding, selective coding, field notes and memos were used to document the dimensions and the interaction between the dimensions (Benson & Holloway, 2005).

<div align="center">Major Themes</div>

The purpose of this section is to present the major themes that emerged from the two broad based research questions: (1) How do baby boomers perceive their adaptation process in a changing work environment, and (2) What factors influenced baby boomer(s) adaptation? The themes are organized around the questions using italicized direct quotes from the participants to enhance the presentation.

Adaptation Process Perceptions

Data collected for this area was driven by the following interview question: "How do baby boomers perceive their adaptation process in a changing work environment?" The purpose of the question was to gain insights into how participants viewed adaptation as a process that could be compared to the conceptual framework. The findings were as follows: (1) Participant perceptions of the adaptation process generally matched the TWA model (Dawis & Lofquist, 1984), (2) the primary component of interaction was viewed as extremely complex and included a variety of both tangible and intangible external factors at both the organization and individual

<div align="center">80</div>

levels that influenced internal interaction, and (3) effective communication was viewed as

essential to any adaptation process being successful.

The effect of technology and health care regulations resulting in a variety of new

operational policies and procedures was viewed as a major, tangible external factor influencing

the participant's adaptation process. With technology emerging as a sub-theme, Christie stated:

> *Technology of course is huge; we've all been influenced by technology. I remember my first word processor and thinking how cool that was and I had a secretary and the two of us learning how to do all those really cool things on the word processor. So technology as far as even your office communications and office work was huge. And being able to develop newsletters and communication and what can we send out to people. And marketing and public relations and communication. And we did so much with digital photography, working with graphic designers and it was really neat to watch each of these people do their trades and use the equipment and the tools that they have which they didn't have five years before that.*

Asher noted that the biggest changes he has viewed have been in the development and

evolution of different technologies. He said:

> *When I started with a computer or looked at it, there was no formal education, no formal training on doing it. It was just picking up the manuals and trying to figure out how adept or what this simple thing would do to provide me with a greater productivity or tools to get to an end result. Sit back now and you realize that just 10 years ago the difference in changes from VHS to DVD, the difference from HDTV to regular analog signal.*

Maria was most adamant when she answered question #1 of how changes in the workplace

have affected her.

> *Well, #1 that comes to my mind is the technology. You have to be willing to get the basics of what you are working with to be able to understand the change in it. You know, you have to with the computer, I remember the first time I ever turned a computer on it was to talk to somebody who lived in Ohio. But I didn't know how to send an email. I didn't know how to do an instant message so you have to be willing to not be afraid of technology. Because it's here. You have to accept it and learn it or you're going to be left behind because not only in your home personally with technology but it's in the workplace. I don't know how to text message. My phone will text message, but I don't know how to do it. I might be left behind because whenever I need to vote on something that needs a text I don't know how to send it. It's all around, the technology. It's already changing, if you haven't jumped on the bandwagon you're probably already behind. In work the computer skills, if you don't know how to turn on a computer, it's no longer a paperwork society, we*

have to know how to have the basics with the computer. You don't see anybody with a typewriter anymore, it's all the keyboard, it's all linked to a computer and a disk and you can take things and store things and it's getting compacter and compacter so you have to know how to go with the times of technology or be able to step back and take a class.

Alice described the introduction of technology in other terms stating that computers have impacted her environment through the ability to gather information and use it more effectively. She stated it was easy to adapt to the new technologies but accountability for utilization of the information in a healthcare environment has increased her stress level. For example, given the increase in regulatory obligations and litigation in the work environment, the ability to protect oneself via written documentation is a dual edge sword as it also exposes individuals to what should have been done, but was not.

Of particular interest in Alice's interview was her approach to the adaptation process. She stated she is a take-charge person who leaves little to chance. She is deliberate in her decision-making and direct in her action. She is a careful and conscious planner who assesses a situation, develops alternatives, analyzes potential outcomes and progresses in an advantageous manner. Whether she is reacting to a changing environment or proactively changing it herself, she utilizes the same process.

Several participants noted a second sub-theme, the impact of governmental regulations on the healthcare industry and the need to adjust to a work environment that has been under constant change due to external regulatory factors in which the organization has no control. Their organizations are faced with compliance issues or being subject to severe financial penalties if compliance is not achieved. Thus, they stated, healthcare workers have been faced with dealing with implementing operational policies dictated by senior management that often seem conflicting and confusing.

Peggy is a highly seasoned, career professional Director of Human Resources who has a highly personable, caring and compassionate approach to supervising her staff. She viewed herself as decisive and one who "does not waffle" once she has chosen a direction and course of action. She viewed the adaptation process in which the synergetic power of the organization and work environment are greater than the individual, including herself. In other words, she stated that organizationally, there is often a bigger picture and reasons why organizations decide on a course of action that should be accepted with a healthy attitude by workers. From a process perspective, she saw the process starting with having a positive attitude about adapting to change and personally removing conflicts that permit accepting the changes more easily. She viewed it as an internal process that has come from experience and maturing and involves a level of trust in management doing what it should be doing. To fight the process "can be unhealthy and doesn't endear yourself in the long run."

Aij emphasized the importance of reaching a point of homeostasis by proposing that workers are constantly seeking stability in their job. She also brought into play the interactive component of matching individual needs with organizational requirements. She suggested successful adaptation and tenure are a function of both parties meeting the other's expectations. Aij noted:

> *Or they might be looking for a job where they can just kind of be comfortable. So their dedication and their skills play two different issues. And a lot of people don't learn quickly. They don't like change. So they may want more independence, work at their own pace and get the job done independently. Or if you try to box people in or try to make them do in a certain expected way, they may not be able to succeed so they may really struggle with it. So because these age groups change and they bring to the job different expectations, you have to change the job sometimes, but be careful not to change the outcome.*

Christie pointed out that organizations have requirements for functioning and individuals have skills and abilities that compliment management's needs. She argued that the key to the

adaptation process is education and communications. She stated that adaptation is required when change occurs. Since workers resist and often fight change, resistance is overcome through education and communication. Education and communication result in worker buy-in. She also emphasized the key point of matching individual and organizational needs. She viewed matching as vital to the adaptation process. Ultimately, she emphasized that regardless of the process, education and communication are essential if both the organization and individual are to be successful.

Myles agreed with Christie stating that communication is what is required for the worker and organization to move in a common direction and achieve a common goal. Communications helps avoid confusion. He said that employer communication is important to minimize change being perceived as a "negative thing". Alan was also in agreement stating that it is essential for management to communicate change along with communicating the organization's needs. He was convinced it helps employees develop an attitude of openness to change. He viewed the change process as flow chart based mapping out how a particular change would occur with effective communications being the vehicle to success.

Generally, the participants supported the TWA process component. Of particular importance is that the participants agreed that effective communication was a vital link in making the TWA process work. Conversely, they suggested that without effective communication, the process could easily break down resulting in the failure of both the individual and organization to achieve common goals. They also emphasized the role of external tangible forces and how they can influence how an organization reacts. Their comments suggest that interactive component between the organization and the worker is compounded by interactive external factors that influence both the worker and the organization. For example,

governmental regulations can result in the organization needing to develop rigorous policies and

procedures that affect worker behavior. Concurrently, a single parent worker may be affected by

personal life issues that conflict with organizational needs. Therefore, the concept of interaction

within the TWA model may be more complex than it appears due to a variety of 360 degree,

three dimensional factors influencing both the worker and organization.

Factors Influencing Adaptation

Analysis of the data resulted in six major themes under the broad category of factors related

to the question: "What factors influenced baby boomer(s) adaptation?" A summary of athe

emerging themes are shown in Table 3 (p. 85). The table provides a capsulated summary of the

themes expressed by the participants. A detailed discussion of the categorical factors and sub-

themes follows.

Table 3

Summary of Major Themes

Major Themes	Sub-Themes
Flexibility	- Adaptation to meeting organizational versus personal career expectations - Reconciling differences in personal and organizational work/life expectations - Adaptation to mergers and acquisition changes - Openness to new or different ways of doing things - Accepting and trusting of organizational and management perspectives - Demonstrating interpersonal adaptability

Ability and Willingness to Learn	- Requires intellect as well as basic English communications skills - Attitude is critical to learning - Learning never ends due to work environment changes and the increased availability of information - Openness to the opportunity for personal growth - Encountering vast amounts of information and determining value and application to individual job responsibilities - Learning how to achieve work/life balance in today's changing work environment
Attitude	- Ongoing change is a process norm to be embraced versus resisted - Openness - Commitment to change, learning and achieving life balance - Intrinsic and extrinsic motivation - Positive, can do approach - As value based – integrity and honesty - Determination and persistence - Demonstrating interpersonal adaptability - Embracing new technology
Understanding and working with a diverse workforce	- Diversity is measured in terms of age, culture, gender, family versus no family, and management versus non-management - A diverse workforce brings diverse needs and expectations that may be different or non-traditional - Diversity is manifested in reference points such as music, values, perspectives, and traditions - It encompasses people versus organizationally based cultural adaptability

Coworker and Family Support	• Acceptance and buy-in from co-workers • Family understanding of traditional and non-traditional work requirements • Lack of support often results in lack of success • Good relationships lead to trust and teamwork • Positive and negative reinforcement effects a worker's confidence
Ability to function in an evolving organizational structure	• Change from a structured to an unstructured work environment • Generalist based teams co-existing with teams of diversified specialists • Clearly structured operating parameters with unstructured means to accomplish tasks • Greater need for individual and team based creativity and innovation

Theme 1: Flexibility

All of the managers discussed, on multiple occasions and in detail, the importance of

flexibility as a critical factor in the adaptation process. Aij mentioned the word "flexibility" nine

times stating, "the most important factor in successful adaptation is flexibility." She noted, "you

have got to be flexible" and discussed the concept of flexibility in multiple ways.

First, flexibility was discussed in terms of the conflicts that exist between the expectations

of the manager versus the expectations of the employee regarding work/life issues. While

managers may base their priorities of work first with family second, today's younger employees

tend to place family first and work second. With the need to be consistent and fair in the

treatment of employees, Aij affirmed that reconciling personal versus employee expectations has required a level of flexibility and compromise that tends to be more of an issue today than in years past. Balancing the needs of the organization against the needs of the employee is critical and in most instances today, that balance favors the employee. She said, "The bottom line is that you absolutely have to be flexible and keep in mind everybody's personal issues that are going on in their lives so that they can be successful and still accomplish what they need to accomplish".

Second, Aij asserted that many people do not like change nor adapt to change easily. In the past, work environments, particularly healthcare, were more structured and as she noted today, "there is nothing structured about healthcare" requiring constant adaptation to a changing work environment. Conversely, Peggy, Human Resources Director, indicated that there has been a dramatic increase in structure due to (1) more detailed government regulations impacting operations, (2) leaner and smarter workforces in which productivity has increased with fewer workers, and (3) economic factors. She held that flexibility has been the key to working creatively within the structure to get the job done. She pointed out that the healthcare environment has been cyclical and that accepting changes were unavoidable with flexibility essential to her adaptation.

Third, Aij discussed adaptability in terms of flexibility in one's approach to his/her personal career. She found herself reflecting on the choices one faces on career options and personal commitments of time and energy to the organization versus quality of life. Aij is experiencing conflicting feelings and thoughts about beliefs in a traditional work ethic and the approach being taken by younger workers that work is not as important as living life. That conflict was expressed as follows:

Well, I've had to adapt to where I am in my own career. You know as far as what do I want to get out of the job. Do I want to keep climbing a ladder or am I here temporarily? Do I want to make this role the role I stay in for a while? Am I stable in this one? Am I comfortable in it? Or am I looking for something more because when a manager is not comfortable, and they are looking, that tends to change the whole perspective of the managers underneath. Cause you can sense it. It's really hard not to communicate it.

Christie was equally as emphatic that flexibility is critical in adaptation to a changing work environment. However, her experiences were quite different and involved adapting to (1) changing technologies, (2) the results of mergers and acquisitions, (3) issues of standardization versus individualism and uniqueness, and (4) adaptation to changing governmental policies and regulations affecting the healthcare industry. Concurrently, she noted that while flexibility is critical to adaptation, the paradigm of ongoing change is not as critical today as it has been in the past. When change frequency first increased years ago, it was harder, but now that change is constant, she just expects it. She maintained:

I guess I don't feel like there's that many changes anymore. I think it's easier to accept change now because you realize it is always going to be there and you just have to roll with it. You just have to do what needs to be done. You may not always like it, you may not always agree, but it's going to be there and the changes, I think they keep you honest, they keep you looking to do a better job, they keep you flexible, they make you motivated to continue to learn.

Christie discussed technological advances in terms of those advances that contributed directly to the health of an individual and those that affected her on a more personal level, such as computers. Both have required flexibility in adapting to the changes with learning as the vehicle for successful adaptation.

Myles approached flexibility as a matter of survival in an employment environment over which individuals have little control. He viewed flexibility as doing what it takes to do what is best for the organization. He alleged:

In a lot of ways I've decided to do the best things for the company that I can do whether it be here at this location or at a different location. Been asked to go over to our east coast

property and work over there. Been asked to go to South Carolina. Worked over there.
Went to another community and helped open up their assisted living and their care center
and just show that my work ethic is something that comes from inside of me and that it's a
part of my pride in my own work and my person. Realized that there are some things that
are just totally out of my control. You just have to roll with them and watch to see how
they pan out.

As previously discussed, Myles is legally blind. While the words that were expressed did

not suggest that flexibility, as an adaptation factor, was related to being blind, my field notes

reflected implications that flexibility has definitely played a role in contributing to his highly

successful career.

Peggy echoed the view of Myles that survival and personal needs are powerful motivators

for adaptation and flexibility is the key for success. She said quite simply that she possesses an

"absolute need to work. I don't work because I am altruistic, or I do it as a hobby. There is a

financial need to work. I have a particular talent and I have had to adapt or be left behind."

 Asher tended to be a reflective thinker who appeared to spend a great deal of time using

his past experiences as a springboard for making present day decisions. He also affirmed the

role of flexibility as being a key factor in the adaptation process. Asher is a high school graduate

whose work background is apprentice based having dealt with things breaking and needing to be

fixed. As a young man, he was a marine who appreciated structure, a chain of command and

finding simple answers to simple problems. As his career evolved in the maintenance field, he

was forced to come to grips with rapidly changing engineering based technologies that had a

radical impact on his job. At the same time, he began dealing with a rapidly changing workforce

and work environment. As he quoted, "Like I said for the whole thing, the whole line for me is

that change is tough and you have to be flexible enough to be able to go with the flow".

Asher also discussed flexibility in terms of the roles of the worker and manager

maintaining that the manager's role in fostering employee flexibility is equally as important as

the worker's need to be flexible. He stated that it is essential that the worker understands the organization's big operational picture, and it is the responsibility of the manager to communicate and ensure the worker is well informed of goals and objectives. He noted that the ongoing flow of information makes adaptation easier for the worker and helps the worker be more flexible in his approach to his job and organization. He said this is becoming increasingly more important to success as the needs of the various generations become more apparent. He suggests, for example, that older workers ask fewer questions and want more work structure while younger workers want less structure and ask more questions.

Alan approached flexibility more intellectually and logically asserted, "You have to be flexible to know that change is coming about and then adapt to the change. And I think if I didn't understand that I need to be flexible then I wouldn't be able to change. And I know I need to be able to change. A constant changing environment in the workplace, it is not static." My field notes suggested that his approach was both logical and practical, nearly mechanical in nature. As a scientist and individual who deals with basic physics and limitations, he seemed to focus on environmental realities and approach change, problems and other issues in terms of decision trees and flowcharts. He took the concept of flexibility one step further by affirming, "I think maybe another factor is just learning about the process of becoming flexible. Continuing to try to understand that when the work process is new or is changed means that I will have to be able to be flexible with that newness or change." Thus Alan is saying that while understanding that flexibility is important, it is secondary to being able to demonstrate flexible behaviors.

Alice listed her responsibilities of working with a unionized workforce and the extreme pressure she encountered as a manager in a union environment. She suggested this additional aspect within the work environment, when added to all of the other influential factors such as

technology, regulations, long work days, and general level of work intensity compounded the pressure making adaptation much more difficult for many, as well as herself. She stated the primary key to her success in adapting was flexibility in being able to not be overly critical of yourself to the degree that it is detrimental. Rather, she linked flexibility to the necessity to change bringing into play the importance of attitude, life long learning and coworker and family support.

Alice also vocalized very strongly, a point that was alluded to by others. She stressed the amount of responsibility they have as managers and the need to be able to juggle several balls at once and, prioritize which order the balls will be tossed and caught. She suggested that as requirements have increased during their careers that there was an ongoing feeling that to get something done they had to do it themselves. The end results were longer workdays and work/life issues being out of balance. She summed this point up as follows:

> *So the most important thing is the recognition that adaptation has to be made whether it's new use of computer skills or just a change in your work day habits, the time you arrive at work, the time you leave work and setting the priorities because when I was younger starting this job work was my life. And 12-14 hour days were nothing. And that was the norm. My adaptation, I had to adapt to a shorter workday because in order for me to make my home life successful you have to make adaptations in your work life too. So those were some of the adaptations I had to make outside of actually the work environment, how it affects your family and your social life outside, try to keep more of a balance. But again recognizing that there has to be that change. It was very hard for me to do that especially because I've always been one to think that I have to do everything. And once I had reached a certain again, 50 ish, I decided that I couldn't this. I couldn't work 12 and 14 hours a day anymore. So I made a firm commitment to myself that I was going to learn how to delegate more. Keep those days to 10-hour days. 10 hours made it viable not only for health reasons, but it also made it viable to manage my family even though the children were older, but managed whatever I had to do outside of the work environment.*

Flexibility became a willingness to be open to new approaches for working. Risks were taken that involved issues of insecurity and giving up past views of how work is accomplished. For example, Alice began through delegation; Aij discussed the issue in terms of managing

employees more successfully to achieve balance; Christie learned to use technology more efficiently; Asher discussed the issue as a continuing process of "fine tuning"; Maria discussed it in terms of enhanced communications between coworkers and the team. The participants' flexibility became the framework for becoming more efficient and effective managers with each demonstrating some different behaviors within the framework to achieve their individual goals.

Peggy viewed flexibility quite simply as a matter of choice and commitment. One either makes the choice to adapt and commit or does not. Some are able to do it easier than others. The greater the level of commitment the organization has to the employee and the employee has to the organization, the easier it is to adapt. However, as organizations have evolved over the years, there appears to be less commitment by organizations to their employees; consequently, less commitment and loyalty demonstrated by employees toward their employer. Therefore, pay, benefits and an environment of fairness have become increasingly important in recruiting and retaining staff.

Peggy also proposed an important key to flexibility is not taking things personally. Individuals respond to their own needs and wants and while they can be influenced by organizational philosophy, policies, pay, benefits and management; ultimately, they must be committed to themselves and their families. Therefore, she suggests, just as the baby boomer must adapt to the organization, so too does the organization need to adapt to the diversity of the baby boomer cohort.

A common thread that existed throughout the analysis was the appearance of a progression of the sub-themes comprising flexibility. They progression is depicted in Figure 3 (p. 94). The progression began with openness which was defined as being open to change and new or different ways of doing things. If workers are not open to facing varied personal and

organizational changes from the beginning, they may be unable to progress to the second level of

the progression described as reconciliation. Reconciliation was viewed as a process of dealing

with differences in personal and organizational work/life expectations regarding the changes

being made. If individuals were unable to effectively reconcile those differences influencing

adaptation in their personal and work environments, than they were unable to move to the third

level of acceptance of the changes. Acceptance involved being able to acknowledge and trust

management decisions and organizational agendas regarding change as being in the best interest

of the worker. The final step involved the demonstration of individual adaptability through the

demonstration of behaviors acceptable to the organization. Flexibility, therefore, represented

successful completion of a series of steps in an overall progression model that contributed to
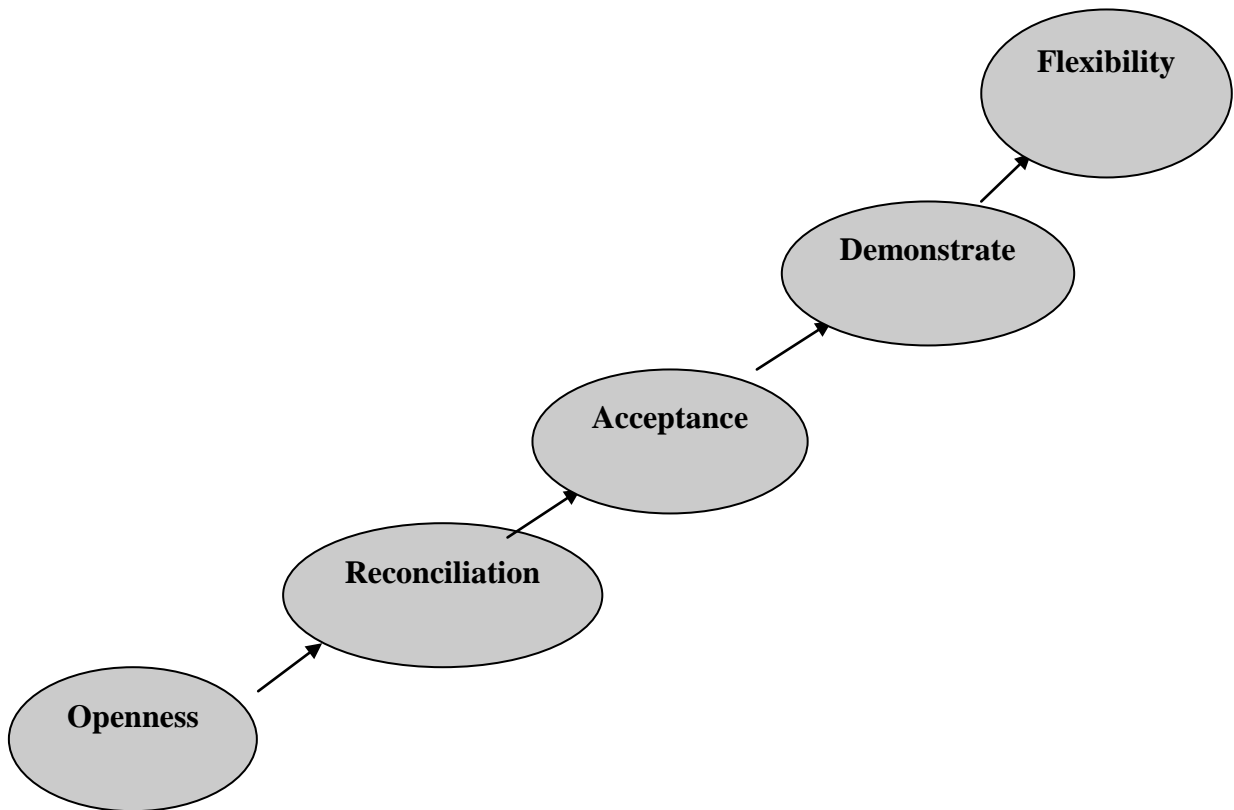
workplace adaptation.

Figure 3: Flexibility Progression Model

In summary, the participants defined flexibility as a range of behaviors with "just going

with the flow" or "laissez faire" approaches on one end of the spectrum to learning and being

proactively deliberate in managing the process of change through specific flexible behaviors on

the other. Concurrently, participants demonstrated an alignment with Dawis theory (Dawis et

al., 1984) suggesting interacting with the environment occurs on reactive and proactive,

emotional and rational/logical and tangible and intangible levels.

Theme 2: Ability and Willingness to Learn

The second major coding category to emerge was described by participants as an ability and

willingness to learn. Each participant emphasized the introduction of various types of

technology to the workplace and the impact it has had on the workplace. For example,

participants noted the use of computers in enhancing productivity from tracking, trending and

analyzing data to help with decision making. Computers as well as cell phones were mentioned

in terms of improving communications from using email to the constantly available mobility of

communications devices. In every instance, participants stated the introduction of different

technologies has required workers to learn. Aij stated:

> *computer technology has had a huge effect on this adaptation and different ages adapt*
> *differently depending on what their limitations are. And a lot of people don't learn quickly.*
> *They don't like change. You have to be willing to learn new things. Go back to school, take*
> *a course, listen to a new way of doing something, and some adult learners at this level,*
> *sometimes they go on. But what I've discovered is everyday you can pick up a piece of paper*
> *and there's a new way to do something.*

This position was echoed by Christie who expanded on the introduction of different types of

technology in the healthcare industry. She described from a clinical perspective, the impact of

new equipment and machines in the hospital setting used for the delivery of patient care. She

further recalled making the transition from a word processor "thinking how cool that was and I

had a secretary and the two of us learning how to do all these really cool things on the word processor."

Alice spoke of learning various and specific computer software applications that were necessary for her to perform her job duties. With the availability of such programs as excel, came the availability of vast amounts of specific data that required learning new ways to not just interpret the information but how to use it to improve performance. No longer could she "fly by the seat of her pants" in making decisions. The need to develop specific action plans based on tangible data required her to learn new ways to think. Learning meant going outside the box to look for new ways to view and examine information and apply it to her workplace.

As the ability and willingness to learn was discussed, two major and distinct themes emerged. First, the ability to learn was represented as both a level of intellect as well as possessing basic English language skills. The language skills were related to a diverse workforce in which many foreign workers lack the ability to read and write English thus providing a functional limitation. Florida participants, as managers, discussed their personal, as well as, organizational challenges faced in addressing this issue. This issue did not present itself in either the upstate New York or Connecticut companies in which the number of foreign workers is limited, or the University setting.

The second component of the overall theme that emerged was a willingness to learn with participants discussing this theme from different perspectives. Discussions ranged from workers learning about technology to survive in the workplace to other workers embracing technology as an opportunity for personal growth. Again, the study found a broad spectrum of motivations for learning ranging from one extreme involving doing it to survive to the other end of the spectrum

of the desire for intellectual growth and development. This component was related to a third

major category of attitude that is discussed later in the chapter.

Asher expressed a third theme that characterized what others expressed by stating that

learning never ends. One may receive formal degrees, certificates, and licenses as well as

informal training but the need to continue learning is essential to ongoing adaptation. He noted

that part of the problem of learning involves the volume of information that is available and the

need to select what information is most important for remaining competitive in the job market.

Alan agreed with the concept that learning is a life long process by stating:

> *Probably in a general way I had to become more of a lifelong learner than I ever thought I would have to be. Whether you are looking at technology, whether you are looking at 'now how do I make this change?' How do I learn more in this world in the discipline I was supposed to know everything about when I graduated the first time. It is not that way. So in those 3 aspects, I have had to continue to want to learn if I am going to continue to be good in my field. We need the ability to be a lifelong learner in a lot of different areas. Again, I think I go back to the aspect of having to take the approach that I'm going to have to continue to learn about the environment I am in today knowing that tomorrow it be a different environment. Versus being very static and not adapting and so that's the thing that continues to stand out on that question, is to adapt I've had to continue to be an evolving learner.*

Asher asserted work involves either ongoing adaptation to fine tune processes or a major

overhaul of a process requiring radical change. In either case, he believed that both the ability

and willingness to learn are critical to individual adaptation if organizational success is to be

achieved. Maria expressed similar views and expanded the position by expressing the need to

change based on baby boomers needing to learn in relation to working with and being supervised

by younger bosses. She noted:

> *Baby boomers, I think, need to learn more because we have to learn what's ahead and we have to learn what a new generation coming in has already learned in the workplace. Like my boss was 30 years old, I'm a baby boomer and it's hard to think that you go into a place and your boss is younger than you are, but you have to realize you might think you have more knowledge, but it's different, people coming in may know more than you know*

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in your years of experience because of # 1 technology. They've been on a bandwagon, they can learn faster with technology than they can in a classroom.

Myles emphasized learning from a historical perspective suggesting individuals and organizations make the same mistakes repeatedly without learning from their past. Workers learn from good managers and good leaders. Managers create a learning environment and must educate workers through aligning their management philosophies with the organization's goals and objectives. Through communication, policies and procedures, employees are educated as to what should be done and why so that understanding occurs. Understanding helps minimize personal frustrations by providing direction and focus. Thus when change occurs, adaptation is easier.

Holly, in addition to looking at lifelong learning from a basic educational perspective viewed the process on a more reflective and introspective level. She commented on looking at her own role within the organization and intuitively questioning what she could do to improve her own efficiencies through personal analysis. She suggested the process is constantly assessing her work environment and learning from her own mistakes and actions to improve her performance.

Alice noted that with technology has come a vast amount of information not previously available to workers years ago. She noted that the amount and speed with which usable knowledge is becoming available is a source of great stress as she attempts to keep pace. The challenge for her was to learn how to recognize useful information and apply it to her specific areas of responsibility. This process of weeding through vast amounts of data to determine what is relevant to one's specific work environment is viewed as a key adaptation component of learning.

Alice also introduced the idea that learning involves embracing an organization's philosophy and values as well as other environmental aspects. She suggested that if adaptation and fit are to occur, it involves learning and embedding oneself in the organizational environment. The difficulty she sees for baby boomers is that, given the age span and diversity of the cohort, there is no single mentality like there has been in previous generations. She suggests the baby cohort is not a single monolithic group but comprised of multiple groups with varied backgrounds and experiences. Ultimately, she points out that there is no single learning methodology an organization can adopt for addressing this group of adult learners.

> *The most important and I think that we haven't done this enough is to identify the best learning techniques and the best methodology of teaching adaptive techniques. Baby-boomers are so diverse. We talk about a depression mentality where everyone in the greatest generation had a certain mentality. They were driven. They know the value of money. And then the baby-boomers come along and we've had so many diverse experiences in our life and we are not a group. We are so individual. And we haven't taken enough time in recognizing each person's ability or inability to adapt. So we may just be getting just any kind of adaptation and I'll just think about computer systems. What are the learning techniques that are the best for this individual, for this adult learner?*

On final aspect of this area was a willingness and ability to learn how to balance work/life issues. Participants suggested that as the work environment has changed over the years so too has the need to learn how to manage both a job and a personal life with increasing demands. Several noted that some individuals are more easily able to do this than others. While past research has focused on the willingness and ability to learn in the workplace, this aspect brings to light that the ability and willingness to learn may have broader applications and implications than hereto thought. Alice stated:

> *when I was younger starting this job work was my life. And 12-14 hour days were nothing. And that was the norm. My adaptation, I had to adapt to a shorter workday because in order for me to make my home life successful you have to make adaptations in your work life too. So those were some of the adaptations I had to make outside of actually*

the work environment, how it affects your family and your social life outside, try to keep more of a balance. But again recognizing that there has to be that change.

Aij echoed the aspect of dealing with work/life balance issues from a flexibility learning perspective.

I'm working with three different groups of people age wise or in their life cycle. I have C&A, I have unit clerks, activity aides, people who come early in their career looking for a job to pay bills. I have a middle group of managers that come to me in their life and they're building families. They may, or may not, be building a career. And then I have a group of people my age who have been in this business a long time work 10-hour days, don't even think about it. It is not a problem for them and that's the way it is. But each group looks at each other differently and I have to balance all these groups so that they all work together. And there's been a lot of bumping and rough edges because the middle group for instance has a set way of doing things and the top group wants the middle group to work more. And that more is not necessarily better. So for me I've had to change my perspective and remember their families and remember the things that I need to balance to manage all these people and still get a successful building or a successful operation. And being in that third age group myself you know I do the job, I come to work, I have the day set out for me and I want to get the job done. Somebody else might come to (somebody who's in their 40s for instance) has to balance that with what they have at home or other things that they need to do. And they don't necessarily make their day their priority. So what's affected me is that the group of people that I work with at this time now in another job ten years ago I might have looked at management totally different because of the people that surrounded me. They may have all been my age. They may have all been younger than me with families. They may all have been single. They really have a definite affect on the management and how you manage the group because they all have different factors that you have to balance.

One interesting finding is that the male participants seem to have embraced the learning of technology more easily than the females. Each of the males expressed an interest in and possessed a high level of comfort in learning and using various forms of technology. Sol, a 53-year-old male stated "Well, I am interested in technology so it hasn't been work for me. As the years have gone by and the technology has advanced, it's become much more user friendly than it used to be and less adaptation is needed today". Asher, a 54-year-old male echoed the position stating that while the biggest changes he has experienced have been related to the introduction of technologies, they have also increased his interest in learning. What started as a requirement for

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his work became a challenge and progressed to a hobby in which he has found himself experiencing great enjoyment and satisfaction.

Conversely, two females spoke of learning about technology more in terms of survival. For example, Christie stated.

> *I remember trying to learn how to use some of the new machines in the hospital setting and thinking I don't want to do this. Let's go back and do this the old way. It's too hard. And it was very hard because I want to do that, I didn't want to deal with some of the equipment issues. But then again you had to do it. Your were forced to do it. So you did.*

Maria discussed the fear that she and other individuals have encountered in learning about technologies, especially computers. She felt baby boomers were afraid of making mistakes, losing data, and hurting the system. She felt it took time to learn to trust that the system would work and be advantageous to completing tasks. The remaining four females commented on the need to embrace technology but did not indicate adversity to or the fear of its impact on the work environment.

In summary, the ability and willingness to learn in this environment focused on two specific aspects. In the healthcare arena, ability was important but not so much viewed from the perspective of intellect but from the ability to comprehend and speak English. The dominating perspective suggested the greater the level of English language skills, the easier it is to learn and adapt to a changing work environment.

The second component of willingness appears far more complex with a variety of factors contributing to the baby boomers' willingness to learn. The implication is a motivational continuum ranging from learning for career survival to a more enlightened position of achieving intellectual growth and development. Reinforcing factors include extrinsic environmental incentives including pay, benefits, career advancement and intrinsic factors such as personal satisfaction and actualization.

Theme 3: Attitude

Each Participant identified this factor as being critical to successful adaptation. They described in detail how workers could either resist changes in the work environment or embrace changes as an opportunity for growth and advancement. Attitude was described differently from flexibility in that attitude is the position one takes to demonstrate how they view change versus flexibility as a behavior demonstrating how change is managed. In many ways, participants felt that having to deal with increasing change over the years has resulted in an acceptance that ongoing change has become a norm. Each noted the importance of being positive in their approach to dealing with change. Christie summarized the view of most this way:

> *I think it's easier to accept change now because you realize it is always going to be there and you just have to roll with it. You just have to do what needs to be done. You may not always like it, you may not always agree, but it's going to be there and the changes, I think they keep you honest, they keep you looking to do a better job, they keep you flexible, they make you motivated to continue to learn. because if you don't learn and if you don't adjust to those changes, you're not going to be there, you're going to be gone because there's going to be a lot of people waiting to take your place."*

She further discussed attitude in terms of intrinsic motivation stating that the desire to be successful comes from within. Myles took the same position further expressing attitude in terms of pride and determination and wanting to set a good example of how others should behave by leading by example. He saw himself as both a leader and manager who role models attitude and helps create a work environment where others share his perspective.

The participants viewed change as acknowledging the idea that the only constant is change and, therefore, it is something to be managed versus resisted. Aij explored attitude somewhat differently in terms of attitudinally demonstrating commitment to change, learning, and achieving a balance between family and work. Asher discussed attitude in terms of motivation to adapt and work, especially when external incentives or disincentives are not significantly

present. He was emphasizing that motivation is both intrinsic and extrinsic and behavioral reinforcement plays a key role in the type of attitude an employee demonstrates.

Myles focused heavily on attitude and the concept of "can do" and on being positive. He spoke in terms of employees wanting or not wanting to do something, be it listening, trying new ideas, wanting to do what is best for the company, wanting or not wanting to learn, wanting to please, wanting to believe in management and leadership and making a commitment to accomplishing organizational goals and objectives. He believed that those who trust organizational intent and efforts, buy into the organizational philosophy, and are determined to contribute to the organizations success through pride in themselves and their work, will be more successful in adapting to workplace change.

Maria, while agreeing with the other participants, approached attitude somewhat differently by recognizing that baby boomers are aging and that frequently, supervisors are younger than the employee. She recognized that while she may have greater knowledge and experience than her boss, he possesses seniority. Attitude is important in overcoming issues of trust and respect. She felt that younger generations might be more amenable to change while older generations may be more resistant. Consequently, the relationship with a younger boss and the importance of communications are becoming increasingly important in the ability of individuals to adapt to change. For her, the process starts with attitude.

Input from Sol yielded yet another point of view by suggesting that a positive attitude is vital to stimulating creativity and the use of imagination in dealing with change. For example, as the Staff Development Coordinator, he is constantly dealing with changing governmental guidelines and corresponding organizational policies and procedures. He suggested that individuals can either be stressed by the changes or take the positive approach and be innovative

in their approach to implementing the changes. The approach taken is a decision made by each individual.

Alan considers "openness" and "willingness" to be two key components of attitude. He views openness as recognition that one must realize that change in the world will be ongoing versus the world being static. Willingness involves recognizing that there may be multiple solutions to changing processes in the world of work. He used the introduction of technology as the example of how openness has been important to dealing with change and how the use of technology has increased the number of solutions that are available to more effectively deal with change.   He stated that technology has introduced many new alternatives to problem solving and by being open, individuals are better able to develop more creative solutions than in the past.

Alan also expressed the importance of attitude in how individuals approach their environment by stating needs for "Honesty, integrity in your work, a belief in others, willingness to succeed in a changing environment. A positive view of the need to continue to do better at what you are doing. And what I mean by a positive view is not a stressed out, I must do more, versus I need to do more to just better that profession." In this area, he focused on more preventive models for addressing health and wellness issues and their impact on the work environment.

Holly emphasized the importance of attitude in resisting or embracing change. "It seems like first we all say 'no' or I say 'I just don't want to do that. I don't want to spend that much time changing this program, but then I don't know if it's a kind of denial thing, or why should I work that hard to do it. So I guess I just figure after it settles into my head that these changes have to be made. So I accept it and go forward and it gets done'".   She stated that many people get "stuck in their ways" and that while many people are nice and fun to work with, they just

seem to have a difficult time adjusting to change. She recognized the importance of management working hard to motivate employees to embrace change to benefit both the individual and the organization.

Alice took a different approach to attitude suggesting that the attitude one has may be different depending on an individual's personal motivation of need versus want. Individuals who need to work adapt because they may not feel they have any choice. Their source of motivation tends to be external. Those who do not need to work, but choose to, may not possess the personal stake in adapting to a particular work environment. They are motivated to adapt to achieve personal success and satisfaction. She set forth that determination and persistence are requirements to overcome the barriers that baby boomers and all workers encounter as the workplace changes.

Peggy discussed attitude in terms of openness to a variety of environmental issues including a culturally diverse work force, differing levels of commitment to the organization by individual workers and work groups, and corporate philosophy, policies and procedures. She further discussed the role that management plays in helping develop and foster positive worker attitudes. As a baby boomer, she noted the varying attitudes that exist between groups and their impact on her own attitude. She stated that she has a positive attitude by nature and that experience and maturity have reinforced her temperament and that she has learned not to take negative issues personally.

In summary, participants stated the key attitudinal factors baby boomers must possess are (1) accepting ongoing change as a process norm to be embraced versus resisted, (2) being open to the many diverse aspects and issues that are common to today's evolving work environment, (3) being willing to personally commit to adopt those behaviors that help achieve fit, (4) being

willing to learn and achieve life balance, (5) understanding that motivating factors are both intrinsic and extrinsic, (6) possessing a positive, can do approach, (7) an attitude that involves integrity, honesty, determination and persistence.

Theme 4: Understanding and Working with a Diverse Workforce

Eight out of ten participants noted the diversification of the workforce and its impact on how work is performed. They discussed how issues are raised and addressed, the influence diversification has on relationships and the importance of how relationships are managed if organizational success is to be achieved. Conversely, half mentioned the negative effects that take place when sound workforce relationships and support are lacking. Diversity was defined in a variety of ways including: (1) age, (2) culture, (3) gender, (4) family versus no family, (5) union versus non-union employees and (6) management versus non-management. Most recognized that today's workforce is becoming increasingly diversified and that baby boomers are in the middle of the issue. The baby boomer cohort is comprised of a wide age gap between those at the beginning and end of the baby boomer age spectrum. From an individual perspective based on individual needs and objectives and value based reference points, participants are suggested that adjusting to perspectives of other members of a diverse workforce is difficult for baby boomers.

While each participant discussed diversity issues, Aij was most vocal in expressing her thoughts. She noted the difficulty she was encountering in attempting to achieve a balance between maintaining employee morale and satisfaction and accomplishing the organization's goals and objectives. As an individual, she commented on her commitment to the organization and the need to get the job done. At this point in her life, work is her first priority and family, as

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well as other aspects of her life, come second. While she noted a variety of diversity examples, she focused mostly on age differences. The following excerpts summarize her thoughts.

> *I realized that there are three age groups that we were basically dealing with, under 40, 40-50, and over 50. People come to jobs for different reasons. They are either looking for a paycheck. They are looking for a career, but it is very evident that the age group definitely affects the workplace. And as a manager, you have to manage all those issues. The personal aspects that people bring to the job as well as the business aspects. And so you have to take into account all the personal reasons that people have personal issues that people have in their life that they bring to their job, their children, their husbands, their work hours, and what it is they are trying to get out of the job. Some people are evidently here for self worth, job satisfaction, and are comfortable. And there are other people who come to a job looking for advancement or looking for more money not necessarily more work. The age or the perspective in their life cycle that they come to employment is definitely a factor in successfully employing someone.*

When talking about lifestyle balance, Aij struggled with being a manager who is measured with meeting goals and objectives while dealing with employee issues and expectations that affect morale and productivity.

> *So I've had to let go of some of that expectation and try to look at it from a different perspective, from someone with a young family. I was in that position once but it's like childhood, the farther you get from it the more you forget. So you have to remember they're balancing a babysitter, or they're balancing school, or they're balancing other things and still expect to them to perform at a certain level.*

Aij expressed concerns over treating everyone fairly and the perceptions of what fairness may mean to one individual versus another. She believes the perspective and reference points from which a diverse workforce come from can have a dramatic impact on how business is conducted. Based on her individual up-bringing and value based reference points, she admitted that it is sometimes easier to be judgmental and discount opposing views versus looking within to see how she needs to change and create win-win situations.

Christie commented on the importance of a diverse work force and hiring individuals with a wide variety of backgrounds that can complement you and bring something different to the table. She stressed the important of utilizing the strengths of each person to accomplish goals. She

noted the fear that some employees have to this diversity, the resistance that can exist within an

organization and the need to educate workers to achieve buy in for this approach. A diverse

work force can spawn creativity and support and can help lead to a more fun work environment.

Myles noted that in his work place ten years ago, there were no foreign born employees. He

stated that foreign born employees have had a tremendous impact on the work environment

requiring both those workers, including baby boomers born in this country, as well as those

coming from abroad, to take steps to adjust to each other and work together within organizations.

> *The fact that we've got, when I first came here, the employment base was all white Anglo-Saxon Americans. There were no foreign employees on this campus. So now we have a totally different group of Spanish, Haitian, Jamaican, German, Russian, Philippino, and we have to address all the different needs and hopefully try to understand the way they grew up so that they feel comfortable and plus try to educate them that just because isn't exactly the same as they are that they can be accepted here. And if you have people from all nationalities here you just keep on having to tell them that, accept what you are hearing and don't criticize or be judgmental because even in our own country, America, is based on all countries of the world.*

Asher discussed diversity in terms of how relationships and communications have evolved

stating that it is now necessary to take time to listen to what others have to say, to solicit their

opinions and to be more careful and deliberate in how responses are delivered. Different people

bring different ideas and expectations as to how something is to be done and therefore it

sometimes take longer to develop answers as to how to achieve a goal or complete a project. He

thinks this makes teamwork more difficult and greater patience is needed by baby boomers. He

further asserted that this is not easy for this generation to demonstrate.

Maria focused on the role of gender changing society and the workplace by discussing how

women are increasingly making in-roads into traditionally male dominated areas. She expressed

that baby boomers have struggled with this in the past and in many instances continue to struggle

today. She questioned baby boomers, as well as our nation's, readiness for a female president.

She stated the need for women to be better listeners, communicators and role models.

Diversity was mentioned in the context of being open minded and flexible. Holly discussed

how our coworkers often become our friends and with that comes tolerance of differing ideas

and ways of doing things. She noted the differences in music preferred by different groups as an

example of how diversity is impacting individual lives.

Sol discussed the impact of diversity on issues confronting all employers and employees.

He said baby boomer traditional reference points occasionally conflict with laws regulating

employee rights and harassment resulting in misjudgments, inappropriate actions and lawsuits.

Peggy echoed this position stating that human resource regulations and litigation are playing an

increasing role in how decisions are made by management. She felt this is placing increased

stress on baby boomers that is influencing their ability to adapt to a changing work place.

Peggy discussed the issues of diversity in recruiting and retaining employees. Just as baby

boomers are struggling with returning to an organization that is changing operationally through

technology and management style, so too are they coping with a work environment that is

changing in the employee mix of women, foreign born workers and age based interests. One

point she made to this end is:

> *we all know that we have to treat groups differently, come from different parts of the world,*
> *and they bring to institutions different cultures and to address those. For instance today is*
> *Good Friday, I notice we have cheeseburgers as the only option and that was a thoughtless*
> *oversight. The same is true of our Haitian population. I have a holiday party coming up*
> *and to be sensitive to the 7th Day Adventists. They're not going to want pork. So you just*
> *have to be sensitive to those needs and honor them.*

Her issue with this thought was one of tolerance and understanding. On one hand she stated

employers must do what is necessary to keep employees stimulated and happy in the work place.

On the other, was understanding the difficulty in keeping everyone satisfied given their diverse

needs and expectations. While she stated that many baby boomers are struggling to adjust to all

of these environmental factors, she believed that her experience and maturity have helped her

become more adept at removing conflict. She reflected that when she was younger, she did not

react as well. She also speculated that a structured work environment with clear rules that

outline expected behaviors, a management team that listens and open communication between

parties will assist in the adaptation process.

In summary, participants argued the dynamics of today's workforce requires baby boomers

to have a greater understanding and appreciation of the diversity issues that organizations are

facing. As diversity issues continue to impact and contribute to the evolution of the workplace

itself, baby boomers must learn to reconcile their personal values and perspectives when

conflicting with others encountered in the organization.

Theme 5: Coworker and Family Support

Seven of ten participants emphasized the importance that coworker relationships contribute

to successful adaptation. Participants recognized that in some instances, more time is spent with

coworkers than their own family and that relationships with coworkers were important in

achieving a high level of success and comfort in their work environment. Concurrently, because

so much of one's life is spent at work, three participants also recognized that providing and

receiving support from their family was critical to adapting to a changing work environment.

Also recognized were the issues and problems encountered by those in the work place who did

not experience support.

Aij stated coworker and family support and acceptance were a critical factor in adaptation.

She noted that she spends more hours with her employees than she does with her family and

believes that most workers are in similar situations. She commented that she did not feel the

need to make people happy or even agree with her position on issues, but their acceptance and role in creating a comfortable work environment is essential. She noted that coworkers are constantly studying each other and sense when something is wrong and both coworker and family support are critical to a comfortable work environment.

Christie was the most vocal in her thoughts on coworker support. She discussed the camaraderie, sharing of visions and learning from each other, struggles and fun times, and the overall need for a coworker support system for adaptation to occur. She stated:

> *So I think that the people you work with are huge and can make you or break you. I had a couple of really good environments where there were very supportive mentors and managers and coworkers. You can't leave coworkers out because your peers are very important. You need to be able to vent and talk and bounce ideas and work together. And when you have a good solid team you can adapt, but I went to another place where we didn't have that. And that didn't work. That not a good situation. So I think the people you work with is the thing that influences you and impacts you the most and how you can affect a change and how you adapt to that change.*

Myles echoed these sentiments adding that coworkers buy-in to dreams, philosophies and goals and are not just important but contagious in adapting. He said that if those relationships do not exist, individuals will not be successful, become frustrated and leave the organization. Asher expanded on this by stating that when a strong team exists, the level of trust in each member's ability to perform and achieve their portion of the work increases and that helps accomplish the overall team goal. Finally, the team contributes to each other's confidence level that helps in even the most difficult adaptation situations.

Alan measured coworker support in terms of being interdependent in the work environment. He stressed the importance of a "collegial environment" in which people that do the same type of work depend upon each other to provide support in solving problems.

Holly has worked in both large and small organizations and described the difference in support at both levels. In the larger organization, the number of available individuals to provide

the support is in greater numbers than in a smaller organization. In a larger organization, this brings a broader perspective to problem solving. However, in a smaller organization, staff tends to be closer and work together on a friendlier basis. For her, coworker support was measured in the amount of positive reinforcement received. She possessed great confidence in her skills and abilities and counts on coworker compliments to encourage her to achieve. For her, coworkers provide a tremendous extrinsic motivational resource that helps with addressing change on a continual basis.

Of particular interest were comments made by Maria who stressed the importance of family as playing a vital role in personal adaptation. She stated her sisters and brothers provide a built in support system and with some in leadership positions, they serve as a sounding board and source of ideas for assisting with the adaptation process.

Personally, with my family. I have a lot of support personally to adapt. I have sisters, and brothers that are all one year apart. So I don't have a generational gap in my family, so I feel like no matter what I change with, my family's all changing with me so I have a built-in support system first of all and that helps me. My family, they're a lot of them have different leader role models. My one sister is a postmaster so she's made a lot of changes, postmasters you would think of years ago as a man. So she's delegating a lot of different things and holds a great position so she and I go back and forth with a lot of different ideas and it's a good win-win support system with me.

This was supported by Alice who noted the importance of both coworker and family support by stating:

Family support. Recognizing people's potential as individual. Corporate support or facility support is necessary, but in some cases it's not the end-all. I think coworker support is much more important. Just a validation of what you're doing is right and that your coworkers appreciate what you do. And of course family support goes without saying. You want to come home and your husband or your wife understand if you have to work late or if there's something new and you have to go to school. That they understand that you've just got to make some changes.

In summary, seven of ten participants clearly recognized the importance of coworker support in contributing to successful adaptation. They noted the significance of peer acceptance,

camaraderie, coworker understanding and support and impact of the overall social environment on adaptation and adjustment to the work environment. While only three participants acknowledged the role that family plays in providing vital support, their points were poignant and relevant and should be considered further.

Theme 6: Ability to function in an unstructured work environment

Research conducted by Yeatts (Yeatts et al., 2000) revealed that the work environment generally and jobs specifically have changed dramatically. He noted that the traditionally managed work environment in which jobs were structured, task and repetitively oriented, and territorial based on individual knowledge had become team based and less structured requiring a more general knowledge, ability and skill level that permitted workers to perform any team member's individual tasks.

Participants noted this change suggesting that the removal of structure, and increased responsibility for decision-making and action has been a difficult transition for many workers. Concurrently, they also realized an increase in structure created by increased regulatory requirements. While these positions seem to be opposing and contradictory, when studied more closely, statements reveal a well-defined and aligned environment in which both dynamics occur. Increased regulation has more clearly defined the parameters in which individuals must work. However, individuals have been given increased responsibility and independence in defining their decisions and actions. As policies and procedures have been increased to comply with regulations, so too has there been greater delegation by management to workers to adapt and perform within those parameters with minimal supervision and increased accountability. The complexity of this work environment is compounded by the addition of individual needs and abilities that test organizational performance.

The findings of this study support those found by Yeatts (Yeatts et al., 2000). However, participants expanded on the structure paradigm to include a variety of factors not previously explored in the literature. The role of the individual team member appears to be evolving to include increased individual responsibility and accountability within the context of the team itself. In healthcare, individual members of a team might combine unique skills that are not shared by others. For example, one member might possess a superior knowledge of legislation, policies and procedures whereas another member might have superior technology skills. The teams goals might be to incorporate the use of technology in the cataloging, tracking, trending, record keeping, and communicating of data required under specific legal guidelines. Should one member of the team lack the skills and abilities or have issues with their particular area of expertise, it can negatively affect the other members of the team as well as the overall organization. These sub-themes influence and support this position.

Christie emphasized the role played by external factors such as legislation dictating how healthcare is to be delivered. Such legislation included restricting communications with fellow workers and family, changes in funding that placed increased financial pressures on the organization, increased political implications that affected organizational public relations and community image and the struggle to keep up with volumes of updated policies that constantly resulted in everyday worker job activities. These pressures resulted in industry mergers and consolidations that placed great stress on workers. As legislation resulted in more carefully defined performance expectations, workers were asked to be more creative in developing ways to adapt and survive. With the additional introduction of technology along with increased regulations, many workers struggled with the constantly changing work environment. Christie noted the insecurities baby boomers experienced, the feeling of fear and intimidation, and the

reaction by many to resist versus embrace the changes as an opportunity to take a risk and grow.

She summarized her position as follows:

I think the people who are rigid and keep saying I can't do it or I don't want to do it obviously those people are not going to successfully adapt. And you have to be a risk-taker. You have to be willing to take a little bit of a risk. Well, let me try and do this. I'll try it, but I don't know. Kind of like that Shell Point commercial. I'll try it, but I don't know. And just be willing to jump in and what's the worse that's going to happen? You might have to say, Sorry I messed up. Or I didn't accomplish it the way I wanted to, but I learned from it. I learned. And next time I think I would do it this way. So you have to be willing to take a risk.

Sol echoed the role of legislation and regulation by stating:

I mean the more and more regulation that comes along, the more work we have to do. But I don't necessarily think automatically that government regulation is a bad thing. I frankly think that without regulation even to the degree we have it which is probably over regulation we wouldn't be as good an industry as we are. Left to our own devices I just don't think we would be as good as we are today. And the proof is the industry has improved 100 fold over the last 50 or 60 years. There's no question. And most of that is because we were forced to. Most of that is because we were made to by legislation. Now there was probably some advancements in just the industry becoming more modern and there would have been some advancement in competition too, but I think that the ultimately the industry standards have increased 100 fold in the last 50 years. And give us higher standards to go by.

Sol put forth that while many have struggled with the increased structure these regulations have wrought, he has had little difficulty. He viewed these regulations as an opportunity to be "imaginative and creative" and to practice his craft in new and innovative ways.

Maria also discussed the impact of government regulations on protecting the worker from being injured in an unsafe work environment. She stated how current regulations call for workers to wear protective gloves when administering nursing care, when 20 years ago, gloves were not worn. Baby boomers remember when gloves were not worn to prevent the patient from feeling like he or she was dirty. Gloves were only worn for administering a sterile procedure. Today, universal precautions require gloves be worn at all times. Some older workers have

resisted this and have struggled with the evolutionary structure of healthcare delivery. Maria reflected that education, communication and acceptance over time have helped workers adapt.

Myles approached the issue of structure through the alignment of goals and objectives determined by senior management and filtering through a performance management system to the individual worker. He suggested that an organization must have a documented and clear direction that is carefully communicated to all workers. He said:

> *I think the new evaluation is a perfect example of good direction. We now have corporate goals that are listed and it's right on everybody's evaluation. We've got the community's goals, then we've got the departmental goals and then we have our individual goals. There's no confusion. I mean it's very clear that we have a course. It is very difficult for older people to understand it. And I said if we have any difficulties in understanding streamlining, and just making sure that every community is doing the same thing, the same way, and abiding by the same policies and procedures you can imagine what the residents are going through. We see it here everyday. They have a hard time adjusting to it and we're here to make sure that we do the best job possible to communicate those changes so that it is not perceived as being a negative thing.*

Myles viewed the changes in work environments and baby boomer experiences paradoxically. Older workers, like baby boomers, have a wealth of tacit experience they have learned quite simply by doing the job over the years. They bring a wealth of knowledge to their team and organization that is not always taken advantage of for the benefit of everyone involved. Conversely, as organizations evolve and make changes in operations, policies and procedures, baby boomers are struggling to understand why and adjusting to what is going on around them. Employees can no longer build their own small world that they can control within an organization but must work more openly with their peers and teams.

Aij discussed the transition from a traditionally structured work environment in terms of accommodation of individual worker needs and an evolving work ethic. She asserted that younger workers are more "me" oriented and seeking such things as flex scheduling, more time off and greater autonomy in doing their job. For the younger workers, their own issues and

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expectations come first, meeting the organizations needs is second. Conversely she noted the struggles she and other baby boomers have had in adjusting to these changes. She said baby boomers are questioning the priorities of younger workers. As organizations become increasingly flexible to accommodate a more diverse workforce, baby boomers are becoming the traditionalist group with many questioning organizational actions, becoming more judgmental and resistant to the changes. She allgeged a key component of adaptation is being able to function in this type of unstructured environment.

Asher emphasized the work environment most baby boomers first experienced was very structured, repetitive, everything was done one-on-one, and done the same way. It was easier to train, teach and mentor because structure provided consistency, minimal issues, and limited individual problem solving and accountability. As the work environment has involved, particularly since the advent of computer technology, the arena has evolved resulting in different ways for work to be done. He focused on the struggles of team building, consensus and how much more difficult it is for many older workers to participate in groups, share risk and objectives and be held accountable for the work of others as well as themselves.

Alan supported Asher noting that the structure of the work environment has required workers to become increasingly interdependent and collegial. Because the work environment is dynamic versus static, what works today may not work tomorrow or vice versa. This evolutionary process has led to, what he viewed as, a total work environment in which everyone works to resolve issues in the world of work. This requires creative problem solving and being able to determine the best method for achieving a task. He held that it is essential for baby boomers to approach this type of work environment positively and accept the latitude that allows workers to execute their responsibilities.

Alice discussed structure in terms of human resource issues suggesting that rules regarding unions, federal regulations such as those on harassment, privacy and other people based laws, along with the fear of litigation have created a de facto structure of what one can and cannot do, both individually and organizationally. These structural factors have forced managers and employees to rethink about how they behave and how work is done. As the work place evolves along these lines, she said workers must relearn and adapt within those parameters. How the organization embraces these rules and regulations affects the employee and they must embrace the same philosophy as the organization or they will struggle. Alice suggested that not everyone, especially baby boomers is good at this. Her general philosophy was that baby boomers need to want to adapt, and, if they want to badly enough, they will.

Peggy echoed previous participants noting the impact on external factors influencing how both organizations and individuals adjust. She, like others, noted the impact of laws and regulations and the need for individual team members to work smarter within the mandated and organizational guidelines. The regulations again provide the structural boundaries and parameters, but how the team and individual function within is unstructured and left to individual discretion.

Additionally, Peggy added such structural components as budget parameters and market based competitive factors such as wages and benefits have influenced how decisions are made and implemented. Teams are increasingly required to do more with less. Therefore, the role of individual team members has become increasingly important and challenging. She said it requires greater leadership and planning along with greater delegation and individual effort. She indicated baby boomers, as more mature workers, seem to be adapting more easily in this arena than younger, less experienced staff. She believes they are able to resolve conflict more easily

than younger workers and while they may not like what they see or have to do, they tend to be more flexible and accepting.

In summary, based on participant input, the concept of structure appears to be less black and white than described by Yeatts (Yeatts et al., 2000). This study reveals structure can be defined by the types of parameters that can impact operations such as legislative guidelines, budgets, market competition, organizational goals and objectives, and policies and procedures. The absence of structure can also occur by creating a work environment in which individuals are encouraged to be inspired, creative, and motivated risk takers who come with new and innovative ways to get the job done. Successful behavior is reinforced through performance evaluations and pay while poor performance is addressed through performance management programs such as evaluations. While participants suggest some baby boomers have adapted well in this area, they also suggest others have not but will need to if they are to be successful in the years ahead.

Summary

This chapter discussed the factors that emerged from the interviews with participants. The first area addressed compared participant perceptions of the adaptation process to the conceptual framework described in the Minnesota Theory of Work Adjustment (Dawis & Lofquist, 1984, Griffin & Hesketh, 2003). The findings were generally aligned with this framework but data revealed increased emphasis by the participants on tangible factors such as technology and regulatory changes that are influencing the intangible aspects of P-E interaction. The findings also focused on the role of interaction within the adaptation process and the importance of communications in affecting change in the workplace.

The factors influencing adaptation to a changing work environment were identified as (1) flexibility, (2) ability and willingness to learn, (3) attitude, (4) understanding and working with a diverse workforce, (5) coworker and family support, and (6) ability to function in an evolving organizational structure.

CHAPTER V

DISCUSSION

This chapter includes a discussion of the data and interpretation of the results within the parameters of the research questions. The chapter begins with a review of the research questions and explores each of the factors that emerged from the study in detail as they relate to the literature. The discussion includes confirmation of those areas in which previous research is supported as well as those new areas in which there is either no previous research found or those in which the previous research conflicts with these findings.

A Restatement of the Research Questions

This study was designed to explore and analyze the experiences of baby boomers in adapting to their work environment. The goal was to understand how baby boomers have adapted to a changing work environment by gaining insight into their personal experiences using naturalistic inquiry. The study focused on two areas: (1) baby boomer perceptions of their adaptation process in a changing work environment, and (2) factors that influenced their adaptation. The following two broad questions guided the investigation.

1. How do baby boomers perceive their adaptation process in a changing work environment

2. What factors influenced baby boomers' adaptation?

Interpretation of Findings

The purpose of this section is to present my interpretation of the data and how they answer the research questions. The themes are presented within the context of the theoretical models and demonstrates those aspects which fit within the model parameters as well as those that fall outside previous research.

The Adaptation Process

Data collected for this was driven by the following interview question: "How do baby boomers perceive their adaptation process in a changing work environment?" The purpose of the question was to gain insights into how participants viewed adaptation as a process that could be compared to the conceptual framework. The data revealed a pattern of collective beliefs that mirrored the conceptual framework described in the Minnesota Theory of Work Adjustment (Dawis & Lofquist, 1984; Griffin & Hesketh, 2003). As previously discussed, the Theory of Work Adjustment (TWA) is classified among a category of theories called person-environment (P-E) theories (Dawis & Lofquist, 1984). Adjustment is seen as the result of an interaction between an individual and his environment including work, home, school, family, community and other interactive arenas (Dawis & Lofquist, 1984). TWA is a psychological theory that addresses a person's behavior. However, behavior always occurs in the context of an environment. Therefore, any study of a person's behavior must take place within the environment where the behavior occurs. Thus, this theory is specifically geared toward the work environment and, as the work environment changes, so will the behavior (Dawis & Lofquist, 1984).

Individuals possess specific characteristics such as needs and abilities, along with other attributes that correspond with the work environment, including skills and ability requirements. Work adjustment is viewed as an issue of fit and is measured by mutual satisfaction, acceptable job performance and job tenure. The key to the theory involves the interaction between a combination of P-E variables rather than the variables themselves. Particular combinations result in particular outcomes (Dawis & Lofquist, 1984).

The data clearly reflected the ongoing interaction between the individual and his external environment. While Dawis' and Lofquist's (1984) research focused primarily on the intangible components of the work environment and this study clearly supported that position, the data also revealed the additional impact of tangible technology and regulatory change on the individual in the workplace. Participants consistently suggested that having to deal with new and constantly updated computer and communications technology has been an extremely difficult challenge for many, including themselves.

Generally, the participants supported the TWA process component. Of particular importance is that the participants agreed that effective communication was a vital link in making the TWA process work. Conversely, they suggested that without effective communication, the process could easily break down resulting in the failure of both the individual and organization to achieve common goals. They also emphasized the impact of external tangible forces that can influence how an organization reacts. This suggests that interactive component between the organization and the worker is compounded by interactive external factors that influence both the worker and the organization. For example, governmental regulations can result in the organization needing to develop rigorous policies and procedures that affect worker behavior. Concurrently, a single parent worker may be affected by personal life issues that conflict with organizational needs. Therefore, the concept of interaction within the TWA model is may be more complex than it appears due to a variety of 360 degree, three dimensional factors influencing both the worker and organization.

Adaptation Factors

Six major themes emerged from the data. The two guiding questions revealed an overlap in responses as participants concurrently provided key factors necessary to the process of adaptation, as well as, more specific factors influencing individual adaptation.

The findings revealed the six major themes shared commonalities with the 8-Dimension Taxonomy model. Those commonalities are discussed and illustrated in Appendix F.

Flexibility. Flexibility was the predominant theme listed by all participants. This finding supports previous research by Dawis, Griffin and Pulakos (Dawis & Lofquist, 1984; Griffin & Hesketh, 2003; Pulakos et al., 2000; Pulakos et al., 2002). As stated in the TWA model, a critical aspect of the model involves the extent to which individuals demonstrate adaptive behavior as defined by P's level of *flexibility*. According to the theory, those with high levels of flexibility are more readily adaptable and less prone to experiencing dissatisfaction. Conversely, those less flexible become dissatisfied more easily and adjustment is more difficult (Dawis & Lofquist, 1984). Adjustment, as a function of adaptability, has been studied in a variety of areas relating to many organizational variables such as adapting to new people and teams, cultures, technology, and changes in physical conditions (Edwards & Morrison, 1994; Pulakos et al., 2002).

The 8-dimension taxonomy model consists of a series of categories of behaviors that have been extensively researched as adaptability indicators. However, research in this area has not been conducted within the baby boomer cohort. Of the eight dimensions, four were found to be most closely related to the themes that emerged from this study. The first such dimension is *solving problems creatively* and is defined as having the ability to solve atypical, ill-defined and complex problems. The second dimension is *dealing with uncertain or unpredictable work*

situations and is defined as adjusting and dealing with unpredictable situations by taking reasonable action. The third dimension is *learning new tasks, technologies and procedures* and is defined as anticipating, preparing for and learning skills needed for job requirements in the future. The fourth dimension is *demonstrating interpersonal adaptability*. This dimension is defined as adjusting one's interpersonal style to achieve goals, and working with new teams, coworkers, or customers.

These four dimensions are listed as being most closely aligned to the findings of this study given the definitions of the dimensions and the themes and sub-themes that emerged from the study. For example, the dimension of *solving problems creatively* incorporated several specific components of (1) flexibility, (2) ability and willingness to learn, (3) understanding and working with a diverse workforce, (4) coworker and family support, and (5) ability to function in an evolving organizational structure. A sub-theme of flexibility and ability and willingness to learn is openness to opportunities and new or different ways of doing things. Similarly, the dimension of *demonstrating interpersonal adaptability* is associated with understanding and working with a diverse workforce and coworker and family support. The overlap of sub-themes with dimensions can help strengthen both the four dimensions and this study's emerging themes.

The key sub-categories that emerged during the coding process within the category of flexibility in this study included: (1) adaptation to meeting organizational versus personal career expectations, (2) reconciling differences in personal and organizational work/life expectations, (3) adaptation to new technologies, (4) adaptation to mergers and acquisition changes, (5) openness to new or different ways of doing things, (6) accepting and trusting organizational and management perspectives, and (7) demonstrating interpersonal adaptability. Ten out of ten

participants ranked individual flexibility as the most important factor in achieving successful adaptation.

The core of the TWA Model involves interactive theories of P (person) – E (environment), and this study revealed that workers are extremely concerned about their interaction with their organization in achieving a balance in both organization versus personal career expectations as well as achieving a balance between work/life expectations. Some participants expressed their desire to climb the corporate ladder but questioned their ability and willingness to pay the price the organization expected. From increased hours, moves and travel, participants noted that there was always someone willing and able to meet the organization's expectations while others settled into their jobs noting that their present level of stability and life style were more important. They noted that baby boomers may have greater difficulty adapting in this area than younger workers who may be less settled and established.

It is interesting to note that previous research on the P – E discussed the interaction component of the adaptation process in specific terms of "E" the individual's work environment. In other words, "E" has been studied in terms of individual needs within the work environment and the interaction that takes place between P and E in the context of that setting. For example, the TWA Model has assessed personal needs in terms of compensation and tenure or personal interest in a particular career path. In this study, participants added a new and different dimension involving the impact of achieving work/life balance and the interaction that takes place between the baby boomers life outside of work, which at times, conflicts with the baby boomers life at work. This finding is significant in that as the TWA Model attempts to achieve P – E fit, it may now also be necessary to factor in the role that family and the worker's personal and private life have on the work environment. For example, a couple who both must work and

who have children must decide on child care issues when illness occurs, schools are closed or when the baby sitter cancels. In this study, baby boomer managers often experienced conflicts between their personal work ethic that placed the organization above family and younger generations that place family above the organization. In one case, one participant experienced the dilemma himself as a professional and a parent in which both he and his wife work. The baby boomer's conflicting values and requirement to become more flexible in this area is ground breaking and provides an outstanding opportunity for further research.

All of the participants expressed the impact technology has had on their work environment. From the advent of calculators through computers to communications devices, such as cell phones and Blackberries, technology has been a variable that has altered the physical environment within which baby boomers interact. Participants noted that just as technology has posed challenges on the adaptation process, it has also been a useful tool for problem solving. Studies by Edwards and Polkas (Edwards & Morrison, 1994; Pulakos et al., 2002) addressed the strong relationship of cognitive abilities and personality constructs to predicting adaptive performance. This aspect also emerged as a major factor in this study although it was discussed in terms of intellect and an ability to read and speak English. Participants stated the need to learn how to use various technologies as a matter of workplace survival. None indicated any serious personal difficulties that would be related to cognitive abilities. This finding supports the research by Strate (Strate & Torraco, 2004) that change is a complex process with individuals assessing and evaluating their place within the environment and required to make adaptable behavioral choices as change occurs. Taking this aspect one step further, Pinder (Pinder & Schroeder, 1987) found that attitude played a vital role in the ability to adapt to change itself.

This raises the question as to what extent some defined level of cognitive abilities can be overcome by a personal need to survive and adapt.

Flexibility emerged as a category because of its application on a macro level encompassing a wider variety of sub-categories. Using the coding process and conditional matrix, the macro conditions and consequences interacted with micro aspects both directly and indirectly. For example, the key sub-categories of flexibility are: (1) openness, (2) reconciliation, (3) acceptance, (4) and demonstration. The interactions and relations discussed suggest that each step taken may be critical to the next if adaptation is to occur. If one is not open to change, then one may not be able to effectively reconcile differences in personal and organizational work/life expectations. If reconciliation does not occur, then accepting and trusting of organizational and management perspectives may be questionable. If acceptance does not occur, it may be more difficult to demonstrate adaptive behaviors. That there are different scenarios in terms of technology, dealing with work/life balance issues and reconciling career goals accentuates the broader implications for the flexibility factor. Flexibility is the umbrella component in which each of these sub-categories resides.

Ability and willingness to learn. Morrison & Hall, (2003) suggested that adaptability is a generalized state of readiness to respond to new situations and that adaptation be viewed as a process in which the individual applies adaptability in response to a specific change or altered circumstance. In 2002, Dr. Douglas T. Hall developed the Model of Adaptability and Adaptation. In his model, adaptability consists of two components: (1) having the competence to adapt and (2) the motivation to adapt. Adaptive competence and adaptive motivation compliment each other through a process of an individual having both the ability to adapt to new situations and a desire to adapt. My study supports this concept. However, it raises the question

as to whether some defined level of competence, or lack thereof, can be overcome by a greater motivational need to survive. It also brings to light an additional factor not previously noted that stresses the importance to communicate in English. Participants believed this particular component is essential in dealing with a diverse international work force.

This study suggests one possible indicator human resource professionals can use to assess individual adaptability involves the approach baby boomers are taking to life long learning. The U.S. Bureau of Labor Statistics (2003) projects the majority of occupations in which the greatest need for workers will occur between 1998 and 2008 require some operational knowledge of technologies. Technology is the driving force behind job redefinition. The only way to gain that knowledge is through training. Those individuals who are returning to the classroom taking vocational enhancement courses are demonstrating a proactive approach to adapting to the changing labor market and establishing a form of insurance against personal obsolescence (Dover, 2003). Assessing an individual's personal approach to life long learning may be of potential benefit to HRD professionals in assessing job, organization and cultural fit.

In the 8-dimension taxonomy model, the third dimension is *learning new tasks, technologies and procedures* and is defined as anticipating, preparing for and learning skills needed for job requirements in the future (Pulakos et al., 2002). Both her research and the participants in this study acknowledge that technology has also changed the manner in which work is done. Technology has resulted in multi-tasking which has been both challenging and rewarding. For one individual, multi-tasking may be overwhelming and too stressful to handle while for others, multi-tasking means growth and development as well as a way to avoid boredom from traditional single task jobs. Once again, human resource professionals are

afforded the opportunity to explore this area with potential workers to determine their ability to multi-task within the framework of the job fit (Robertson, 2000).

Participants in this study stressed the importance of learning and the impact of technology in the work place. The key components identified in this study of having an ability and willingness to learn were: (1) requires intellect as well as basic English communications skills, (2) attitude is critical to learning, (3) learning never ends due to work environment changes and the increased availability of information, (4) openness to the opportunity for personal growth, (5) encountering vast amounts of information and determining value and application to individual job responsibilities, and (6) learning how to achieve work/life balance in today's changing work environment.

Generally, as demonstrated by the findings, this study supports previous research; however, it brings out two new aspects of learning that deserve further investigation. First, in this study, participants generally assumed that workers within the organization possess basic cognitive abilities and have the ability to learn and achieve a level of job performance competency. They did not focus heavily on the concept of intellect or capability; rather, they identified ability in terms of a worker's ability to communicate in English. They emphasized that learning is accelerated or hampered by one's ability to speak and read English. This was not only true in the area of learning and using various technologies but in other aspects of the job as well. For example, the inability to communicate effectively with coworkers, supervisors or customers could result in potential productivity or safety issues. This situation can occur when a dishwasher's job description does not include speaking or reading English to perform required duties. However, should a fire occur, communications are essential to everyone's safety. This type of scenario can lead one to an applicable question about today's work environment: can

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organizations assume that workers generally possess a high enough level of intellect, that ability to learn is not a variable, but rather that a willingness to learn is essential. The participants of this study emphasized that if ability did not exist, then the employee would not have been hired. The remaining variable is a willingness to learn. As the pace of globalization speeds up and the number of educated immigrants coming to this country increases, one may question if intellect is secondary to motivation.

The analysis suggests that strong relationships and interactions exist between the categorical factors. The ability and willingness to learn includes the key component of attitude and requires flexibility in the form of openness and adaptation to new technologies. The coding process revealed that while each of these factors is significant when standing alone, their relationship to each other is equally significant and must be understood by HRD professionals.

Attitude. Redesigned jobs and work places have been described as enriched work environments (Yeatts et al., 2000). Job enrichment is being discussed in terms of variety, decision-making, global focus and how a job contributes to a product or organization's success (Yeatts et al., 2000). The attitude an individual has toward work can have a profound effect on his or her success in the job, work environment and organization. Many older workers are accustomed to the traditional job and work environment in which responsibility, value and recognition came from being an expert in a single task approach. In an enriched, non-traditional work environment in which recognition is team based, older workers may feel less valued and important. If workers do not demonstrate the attitude and desire to reestablish job fit under the enriched environment, they are doomed to fail (Yeatts et al., 2000). The key point here does not deal with knowledge, skills and ability but rather is more reflective of an individual's ego needs

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and values or transitioning from an emotionally based "I" position to a "We" position job fit (Yeatts et al., 2000).

Pinder & Schroeder (1987) defined attitude as the ability to adapt to change itself. They found that those who had dealt effectively with change in the past possessed a positive attitude that was more receptive versus resistant to change. In traditional organizations in which seniority was a particular privilege, they found individuals who faced change often experienced a fear of losing their privileges. In turn, resistance to change was frequent due to the concept of losing control and a general sense of insecurity. This window into an individual's attitude about change and how it is handled can provide human resource professionals with another valuable tool for assessing a baby boomer's ability to adapt to the work environment.

When older individuals return to work, they must adapt to their job, their organization and the organizational culture (Yeatts et al., 2000). Research suggests there are two key drivers or polarized motivational factors influencing baby boomers to continue working in the years ahead (AARP, 1999; Yamin, 1996). As they return to work, how they reconcile the drivers and the adaptation process must be considered if successful adaptation is to occur. Understanding the relationship of these drivers to the categorical factors and sub-themes should be of great value to HRD professionals.

The first driver is not having saved enough money to fund retirement. In 1996, the Merrill Lynch Baby Boom Retirement Index indicated that the typical boomer needed to triple their savings rate and that many boomers face a savings crisis. This coincides with other privately funded and governmental research (Yamin, 1996). The AARP (1999) study revealed that this group of "Have Nots" comprises approximately 25% of the boomer population who are at the lower end of the income scale. This group is dependent upon Social Security as their primary

source of retirement income and Medicare for their healthcare. The level of retirement planning knowledge for this group also appears to be lower coinciding with their expectations that the system will take care of them. This group will pose serious challenges for government planners, as the level of financial disparity and resulting frustration with the income gaps become a significant sociological and political issue that must be addressed.

My study supported this position by participants stating that they themselves, as well as most others they work with, must work to make ends meet. The result of having to work is that adaptation is a matter of forced survival. The key component of this position is that not working is not an option, but how one approaches working is a matter of choice. Consequently, in this study, participants asserted that attitude was a key factor in the adaptation process.

The second driver for those remaining in or reentering the workforce appears to be based on a totally different set of criteria. Many boomers experienced a significant life style change in the late 1980s and early 1990s as the economy changed and the recession occurred. As a result, this impacted group developed new values and traits based on self-reliance and independence. Layoffs, downsizing and a continuing scaling back of benefits forced this group to learn to take care of themselves if they were to survive and prosper. This approach has carried over into planning for retirement. Because this group was able to succeed before, they believe they will do it again in retirement. The group is positive, optimistic and is far more enthusiastic as they approach retirement (AARP, 1999).

This study, again, supported this position as well, with participants stating that a positive attitude and "can do" approach to the adaptation process was essential to successful work adjustment. Conversely, participants also noted the lack of success that occurred when a positive attitude was missing. Using the constant comparison method of analysis, the relationship of

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attitude to flexibility emerged as being important and vital to each other. As previously defined, attitude is the mental approach to adaptation while flexibility is the behavioral manifestation and demonstration of attitude (Pinder & Schroeder, 1987).

What sets this study apart is the establishment of a link between attitude and flexibility. Previous studies discuss attitude and various components of flexibility distinctly and categorically. Based on analysis in this study, the interaction between the two appears strong and, when combined, may play an equal, if not more significant, role in the adaptation process than the individual categories of flexibility and attitude themselves.

Understanding and working with a diverse workforce. Pulakos et al. (2002) discussed the concept of diversity in the 8-dimension taxonomy model in which the fourth dimension is *demonstrating interpersonal adaptability*. This dimension is defined as adjusting one's interpersonal style to achieve goals, and working with new teams, coworkers, or customers. In this study, participants expressed their belief that the dynamics of today's workforce require baby boomers to have a greater understanding and appreciation of the diversity issues that organizations are facing. As diversity issues continue to influence and contribute to the evolution of the workplace itself, participants suggested baby boomers must learn to reconcile their personal values and perspectives when conflicting with others encountered in the organization. Thus, my study supported Pulakos' research in this context.

Concurrently, the results of this study were somewhat different. Participants suggested workers were primarily focused on understanding and developing individual and personal relationships. Attending to more broad based organizationally founded cultural adaptability issues involving achieving predetermined goals and objectives was secondary. Participants focused on personally conflicting value systems dealing with issues related to (1) diversity being

measured in terms of age, culture, gender, family versus no family, and management versus non-management, (2) a diverse workforce with diverse needs and expectations that were different or non-traditional compared to the participants, and (3) diversity being manifested in a broad range of varied reference points such as music, values, perspectives, and traditions.

This study found demonstrating the dimension of *interpersonal adaptability* to be an important factor. In the case of baby boomers, the dimension of *interpersonal adaptability* seemed to fit more appropriately within the somewhat narrower category of understanding and working with a diverse workforce. However, it is significant to note that this position is taken based on geographically driven input from the participants. Participants from Florida were adamant about this factor while those from New York and Connecticut were not. Perhaps a weakness of this study is the limited geographical component of the sample, as well as, the fact that all participants were white.

Coworker and family support. Research has demonstrated that a key component to assisting boomers in adapting to their work place is management and coworker support (Shonk, 1992). When management is sympathetic and takes specific steps to help older workers become accustomed to their job, transitioning became easier (Shonk, 1992). Similarly, Pinder and Schroeder (1987) demonstrated that support by coworkers was extremely important to establishing job fit. Conversely, the extent to which coworker support is absent can also hinder establishing job fit by creating additional stress and anxiety. Workers need to know they are accepted into their work place and they count on their peers to be of assistance in learning the "ropes", as well as, overcome problems that may arise. Peer support is essential, especially, in times of job transition and organizational change. The dilemma faced by many baby boomers returning to work is the level of knowledge and experience they bring to the work place may be

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perceived as threatening to younger, less experienced staff. Those boomers used to seniority

based on their tenure may find their issues and input rejected by those workers who feel

intimidated or less secure. Consequently, coworker support may not be automatic and managers

must proactively intervene in tenuous situations that have the potential to become politically

charged and damaging to the business unit (Pinder & Schroeder, 1987).

Seven out of ten participants emphasized the importance that coworker relationships

contribute to successful adaptation. They noted the importance of (1) acceptance and buy-in

from coworkers, (2) that a lack of coworker and management support often results in lack of

success, (3) good relationships lead to trust and teamwork, and (4) positive and negative

reinforcement effects a worker's confidence. The importance of both management and

coworkers was noted as managers create the environment and mentor those transitioning into the

organization while coworkers are important to acceptance and inclusion in the team and cultural

family. Participants of the study also noted the stress, anxiety and barriers that arise and

difficulties encountered when coworker support is lacking or minimal. From this perspective,

this study supports previous research.

Of particular importance in this study and absent from previous research was the emphasis

on family support. Participants recognized that in some instances, more time is spent with

coworkers than their own family and that relationships with coworkers were important in

achieving a high level of success and comfort in their work environment. However, because so

much of one's life is spent at work, three participants also recognized that providing to and

receiving support from their family was critical to adapting to a changing work environment.

Also recognized were the issues and problems encountered by those in the work place who did

not experience family support. They noted that in today's changing organizational environment,

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extended work hours might require more time away from family. Spousal and family

understanding and support is essential or may become a distraction that inhibits P-E fit. This

may be compounded in a family situation when both spouses work and children are involved.

This finding of the study, while perhaps not surprising, is new, documented and significant to the

area of work adjustment.

Ability to function in an evolving organizational structure. The participants in this study

discussed organizations as dynamic, undergoing constant change requiring ongoing adaptation.

They believed that their organizations were not static and that adaptation in such environments

was the equivalent of shooting at a moving target. It was often difficult to determine where the

organization was going, how fast it was traveling and what the best means were of staying

abreast. Pulakos et al. (2002) discussed this concept in the second dimension of dealing *with*

uncertain or unpredictable work situations and defined it as adjusting and dealing with

unpredictable situations by taking reasonable action.

 Dawis et al. (1984) stated that workers and work environments are dynamic entities subject

to ongoing change. For example, as technological advances are introduced to the work place, job

requirements change. This necessitates an intervention or interaction that permits adjustment to

the change and helps achieve revised performance expectations. The Theory of Work

Adjustment encompasses a process model with an interactive component and a predictive model

with a fit component.

Therefore, this study supports both Pulakos' 8-dimension taxonomy and Dawis' Theory of

Work Adjustment. However, what is of important is that this study isolates some of the key

factors and sub-themes that baby boomers are currently facing as their work environment

evolves. By identifying those key factors and sub-themes, both baby boomers and organizations

are better able to develop strategies that enhance the adaptation process and therefore more proactively manage versus simply reacting to changes in the workplace.

Atchley (1987) defined adaptation as "the process of adjusting oneself, both inwardly and outwardly, to fit a situation or environment" (p. 243). If this definition were extended to the work place, conceptually, work adaptation could be viewed as a continuous and dynamic process in which the worker seeks to establish a reciprocal relationship or job fit. If each job has knowledge, skill and ability requirements, and each employee has needs, values and interest requirements, then it stands to reason that the extent to which a reciprocal balance exists, so is there job fit. The participants of this study strongly supported this concept. As globalization has occurred and enhancements in technology introduced to the work environment, so has there been a change in the way business is being conducted. Participants noted those changes as follows: (1) change from a structured to an unstructured work environment, (2) generalist based teams co-existing with teams of diversified specialists, (3) clearly structured operating parameters with unstructured means to accomplish tasks, and (4) a greater need for individual and team based creativity and innovation.

The justification for selecting *Ability to function in an evolving organizational structure* as a key categorical factor versus other alternatives including *dealing with uncertain or unpredictable work situations* is based on a more dimensionally based, macro approach to the work environment. Today's work environment requires greater involvement of workers and teams in the design and development of jobs and work processes. Because those workers are actually involved in how the work environment is being transformed, increasingly, it appears work situations are becoming more predictable. For example, as organizations seek to improve productivity through the use of new technologies, teams of workers are increasingly researching,

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exploring, testing and making recommendations for the selection of specific technology tools that they will be using themselves. Therefore, in this study, situations are not viewed as being necessarily unpredictable or uncertain. This team based participative operational format is in contrast to traditional top down management in which work situations were less predictable with change externally driven. Rather, the adaptation process involves playing a fundamental role in helping the organization evolve from the worker level up. As participants noted, adapting to this process places greater responsibility and accountability on all workers and it is this evolutionary process that they believe baby boomers must successfully adapt to.

<p style="text-align: center;">Conceptual Framework</p>

Based on the analysis of the data, a conceptual framework was developed to address the relationship that emerged between the factors and adaptation to a changing work environment. As discussed, the six major themes share some common ground as well as are interrelated in some very specific ways. While each of the factors is able to stand alone, it's relationship to the others in the overall adaptation process is significant. For example, flexibility is directly related to coworker and family support in that a sub-theme of flexibility is reconciling differences in personal and organizational work/life expectations. With out family understanding and support from coworkers and the family, flexibility was shown to be negatively impacted. Concurrently, attitude was important to the other factors as openness was important to flexibility, understanding a diverse workforce and demonstrating an ability to function in an evolving organizational structure. From a relationship basis, it appeared that as each of the factors was enhanced collectively, so too was there greater success in the adaptation process. The conceptual framework is illustrated in Figure 4 (p. 140).
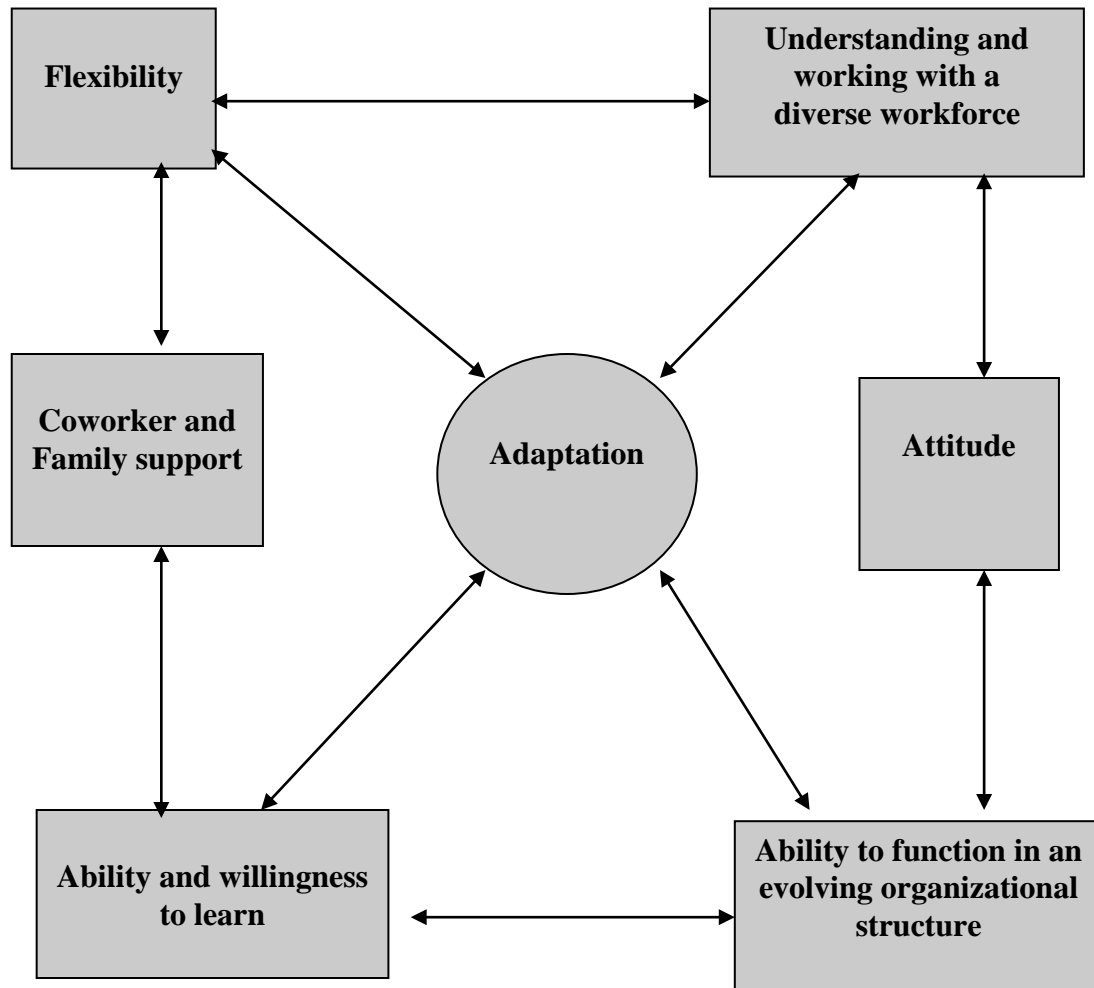
Figure 4: The interrelationship between the factors influencing adaptation to a changing work environment.

Summary

This chapter included a discussion of the data and interpretation of the results within the parameters of the research questions. The chapter began with a review of the research questions and explored each of the factors that emerged from the study in detail as they relate to the literature. The discussion included confirmation of those areas in which previous research was supported as well as those new areas in which there was either no previous research found or

those in which the previous research conflicts with these findings.   Finally, it laid the foundation

for reflecting on new areas of research and implications for the field of HRD.

CHAPTER VI

IMPLICATIONS AND CONCLUSIONS

This chapter discusses the implications for practice, theory, research and policy in the field

of human resource development. It focuses on the findings that are outside the scope of existing

literature and represent opportunities for further research. They also suggest that factors

influencing the adaptation process may not be static but evolving as workplace and personal life

needs evolve.

Implications for Practice

The six key factors identified as influencing baby boomer adaptation to a changing work

environment provide tangible reference points for both organizations and workers to consider

when both parties are seeking ways to enhance the adaptation process. From an organizational

perspective, the information can be used by human resource development professionals to help

foster a cultural environment that recognizes, plans and addresses these factors as it attempts to

recruit and retain baby boomer workers. From an individual perspective, it provides baby

boomers with insights into the issues of adaptation that fellow members of their cohort are

experiencing with suggestions for improving their own chances for successful adaptation.

The key for both is to recognize that the overall categorical factors are not as important as

the individualized sub-themes for it is through these specific components that specific strategies

can be developed that may result in a higher level of successful adaptation. For example,

flexibility is an overall factor, and learning to be more flexible may result in more successful

adaptation. However the question becomes, how does one become more flexible? The answer

lies in the sub-themes. By being more open to change, understanding that a reconciliation

process must occur between the old and the new, accepting that change is inevitable and will

occur, and demonstrating those behaviors that combine satisfactory organizational performance with personal satisfaction and well being, adaptation and organizational tenure is more likely to be achieved.

Attitude emerged as a major theme in this study and the important role participants believed it plays in successful adaptation and organizational achievement. When discussed in the context of the literature, one can recognize the association and role attitude plays in addressing those motivational dilemmas and drivers baby boomers are encountering as they return or remain in the workplace. For example, it has been recognized that when older individuals return to work, they must adapt to their job, their organization and the organizational culture (Yeatts et al., 2000). Research suggests there are two key drivers or polarized motivational factors influencing baby boomers to continue working in the years ahead. Those drivers for baby boomers are (1) working because they have to for financial reasons, and (2) working because they want to for various personal reasons. As baby boomers continue their employment or return to work, how they reconcile their drivers and the adaptation process must be considered if successful adaptation is to occur. The literature and this study aspect focus on the attitude one has and its impact on the adaptation process. Those with a positive attitude were found by participants to experience greater success. Conversely, the absence of a positive attitude was deemed to contribute to failure. Therefore, the findings of this study suggests that it is vital for organizations to consider hiring based on a positive personal attitude and may be equal to or more important than hiring based on skills and abilities. While this important issue may not be surprising, it is significant that participants believed it was vitally important for the organization to achieve greater success. Understanding the importance of this relationship

between attitude and success may be of great value to human resource development professionals in dealing with baby boomers as they work to model future organizational cultures.

Similarly, the findings of this study revealed the impact that work/life balance issues are now having on baby boomers as well as younger generation workers. It noted the conflict that many baby boomers are experiencing in reconciling their personal traditional work ethics with those recognizing that: (1) no one ever jumped up from their grave and said that they wished they could work more and (2) the graveyard is full of people the world just could not get along without. Many are struggling to justify placing the organization ahead of their own personal lives. As organizations recognize that work/life balance issues are becoming increasingly important, one method of enhancing adaptation is to involve employees in developing work/life balance strategies, especially when the changes directly impact them. As policy and practice initiatives such as flexible scheduling, job sharing, working from home, and other creative programs are undertaken to address labor scheduling issues, staff's participation in developing administration plans can be extremely beneficial in reducing resistance and gaining support for implementation (Pinder & Schroeder, 1987). As boomers re-enter the work force, organizations may make themselves more attractive as an employer of choice by offering these types of programs that meet the individual's needs and interests. By balancing the requirements of the organization and the baby boomer, it is more likely to lead to greater satisfaction and individual-organization fit.

Cultural diversity is becoming increasingly prevalent in today's society. Understanding and working with a culturally diverse workforce can be challenging for many baby boomers who lack experience in this area. As globalization occurs, regulatory guidelines change and work structures evolve, human resource development professionals will be charged with developing

strategic action plans to integrate workers into new work cultures. Those human resource development professionals who are skilled and trained in this area will play a key role in their organization's success. One key aspect identified by participants was recognizing that those who communicate poorly in English have difficulty adapting and performing in their work environment. Human resource development professionals have a wonderful opportunity to capitalize and address this important point by offering to incent those with weak English skills to improve them. When viewed by human resource development professionals as an investment in their workers versus being an expense against the bottom line, both adaptation and productivity should improve. Additionally, as the labor shortage increases and employers are faced with the increased use of foreign workers, those employers on the cutting edge of this type of program may experience significant benefits.

It is important at this point to understand the longer-term ramifications and benefits of investing in employees with weak English skills. Many employers are experiencing severe labor shortages. Some of the job openings they have available require lower skill levels. When those positions are not filled, frequently, employers are required to hire costly temporary workers or pay existing workers at a higher overtime rate of pay. By tapping the foreign labor market and investing in workers with lower English communications skills, human resource development professionals are able to strategically partner with organizational departments to better fill vacant positions, reduce overall labor expense and contribute significantly to organizational success.

Finally, participants recognized the importance of family support as a component of the overall factor of coworker and family support. Participants noted that organizations need to recognize that family support is becoming increasingly important in the adaptation process. Therefore, it may be prudent for human resource development professionals to seek new ways to

involve and integrate families into the organizational culture to achieve a greater level of personal satisfaction resulting in reduced employee turnover and increased productivity. For example, organizations can offer their employees options such as: (1) on-site childcare, (2) a child care allowance, (3) on-site sick child care facilities so that parents do not have to stay home with their sick child. In the instance of baby boomers, options can include: (1) offering pro-rated benefits such as health care or vacation time for reduced work hours, (2) offering guaranteed seasonal opportunities, and (3) large national companies offering snow-birds or travelers guaranteed, full-time opportunities with benefits at multiple work sites. Human resource development professionals have the opportunity to explore creative alternative work opportunities that match baby boomer and organizational needs. As the labor force shrinks and evolves, those organizations offering flexible work option programs may experience greater overall organizational success.

<div align="center">Directions for Future Research</div>

As a result of this study, the findings point to some directions for future research. The purpose of this section is to explore those opportunities for further consideration.

TWA Model

When discussing the TWA model and the interaction between P and E, research could not be located that specifically addressed the impact personal work/life balance issues has on the model. This study clearly suggests that this is a factor that influences the model and therefore warrants further research on what and how the work/life balance issues impact the interaction process. In addition, as future research is completed, findings may assist human resource professionals by providing them with additional tools to develop organizational action plans that may include such components as policies and procedures, alternative benefit plans and

scheduling options that will enable workers to more adequately adapt to their environment and assist organizations with retaining valued employees. If the worker shortage increases to 10 million as projected (U.S. Bureau of Labor, 2003), relativity of this factor may become increasingly important.

8-Dimension Taxonomy Model

The results of this study provided overall support for the model. Of specific interest is the support for *demonstrating interpersonal adaptability* to be a factor. However, in the case of this study's participants, it seemed to fit more appropriately within the category of understanding and working with a diverse workforce. While this study found *demonstrating interpersonal adaptability* to be a factor, in the case of baby boomers, it seemed to fit more appropriately within the somewhat narrower category of understanding and working with a diverse workforce. However, it is significant to note that this position is taken based on geographically driven input from the participants. Participants from Florida were adamant about this factor while those from New York and Connecticut were not. This conflict should be resolved and leaves open the door for further research to clarify and reconcile. Specifically, studies of organizations with diverse cultural work forces, to include a higher percentage of foreign-born workers, may produce dimensional or theme based results that are significantly different from organizations having more homogeneous work forces.

Other Research Opportunities

As discussed, baby boomer managers often experienced individual conflicts between their personal work ethic, which placed the organization above family and younger generations that place family above the organization. As they reflected on those conflicting value systems, participants often wondered if they were wrong with misplaced priorities. They struggled to

reconcile placing the organization above their family when they saw younger generations doing the opposite. The participants internal conflicts over their personal value systems, as well as the requirement to become more flexible in this area, is strikingly ground breaking and provides an outstanding opportunity for further research that should prove to be significant to the field of human resource development. Specifically, as baby boomers age, they may find their traditional values conflicting with those of their coworkers and the evolving organizational culture. Being able to successfully reconcile and resolve that conflict may play a significant role in a baby boomer's ability to adapt to their work environment. Future research opportunities exist to determine how baby boomers successfully resolve the conflict and how human resource development professionals can incorporate those success factors into the work place.

Edwards and Pulakos (Edwards & Morrison, 1994; Pulakos et al., 2002) addressed the strong relationship of cognitive abilities and personality constructs to predicting adaptive performance. One assumes there is a balance between cognitive abilities and motivation, which leads to successful adaptation. This aspect also emerged as a major factor in this study although it was discussed in terms of intellect and an ability to read and speak English. Participants stated the need to learn how to use various technologies as a matter of workplace survival. However, none indicated any serious personal difficulties that would be related to cognitive abilities. This finding supports the research by Strate (Strate & Torraco, 2004) that change is a complex process with individuals assessing and evaluating their place within the environment and required to make adaptable behavioral choices as change occurs. Taking this aspect one step further, Pinder (Pinder & Schroeder, 1987) found that attitude played a vital role in the ability to adapt to change itself. While the findings of this study leave no doubt about the role that cognitive abilities and motivation play in learning and predicting adaptive performance, it does raise the question as to

what extent some defined level of cognitive abilities can be overcome by a personal need to survive and adapt. The need to survive is indeed powerful and in a work environment in which one must work to sustain a standard of living, participants deemed attitude extremely important. Therefore, an opportunity for future research may involve studying the role of attitude and perseverance in overcoming cognitive limitations as an indicator for adaptation predictability.

As previously indicated a weakness of this study is the limited geographical component of the sample as well as the fact that all participants were white. Opportunities exist to expand research into a variety of racial and cultural subgroups as well as determining the role of where one lives on how one adapts.

Finally, these findings are meant to serve as a catalyst for further research in a much broader realm that will continue to serve the field of human resource development. As readers review this study, based on their own reference points, they may interpret the results differently and in a manner that will further contribute and add to future human resource development research and practices.

Conclusions

The purpose of this study was to explore and analyze the experiences of baby boomers to identify factors influencing adaptation to their work environment. The goal was to understand how baby boomers have adapted to a changing work environment by gaining insight into their personal experiences using naturalistic inquiry. The study focused on two areas: (1) baby boomer perceptions of their adaptation process in a changing work environment, and (2) factors that influenced their adaptation. The following two broad questions guided the investigation.

1. How do baby boomers perceive their adaptation process in a changing work environment?

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2. What factors influenced their adaptation?

Given the paucity of research in this area, the grounded theory format proved particularly beneficial in achieving the researcher's objectives. The research process consisted of the collection of data primarily through interviews, field visits, the development of inter-related categories of data, and theoretical propositions. The research questions were developed and explored using a pre-established interview guide. Participants responded throughout the interview process to extensive open-ended, semi-structured questions in addition to completing a demographic data sheet. Data analysis was completed using extensive amounts of rich data obtained from a variety of sources including interviews, observations, field notes, memos, and personal reflections. Dimensional analysis was used to help develop theoretical themes and factors that could be examined at both the most abstract and concrete levels. As the process progressed from the concrete data to higher levels of abstraction, multiple dimensions were identified from the data. Open coding, axial coding, selective coding, field notes and memos were used to document the dimensions and the interaction between the dimensions.

Dimensional analysis helped to make the categories and themes more dense, complex and precise by recognizing the complexity of an account and the possibility of multiple meanings of a single phenomenon.   To ensure the highest level of ethics in my study, strict adherence to IRB guidelines prevailed for all participants. Finally, rigor and validity were achieved through adherence to established research protocols and achieving descriptive, interpretive and theoretical validity through the process of triangulation.

Human resource development professionals will be faced with filling labor shortages with non-traditional workers, the majority of which are baby boomers. Learning why baby boomers are remaining in and returning to the labor market as well as understanding how to assist with

their adaptation will be extremely important in addressing labor needs. Understanding those factors and sub-themes that emerged from this study and how they relate to the organization will be extremely helpful to human resource professionals in developing programs, policies and procedures that assist baby boomer adapt to the evolving work place.

This study contributed to the current literature by exploring and analyzing the Minnesota Theory of Work Adjustment (Dawis & Lofquist, 1984) and the 8-dimension taxonomy model (Pulakos et al., 2002) in the context of factors influencing baby boomer adaptation to a changing work environment.

The results of this study confirm that the manner in which the baby boomers participants adapt to a changing work environment, in many instances, is significantly different from those workers in other cohorts that have been previously studied. The impact of 77 million baby boomers, the largest single worker cohort in the labor market today, will provide unique challenges and opportunities for human resource development professionals in the years ahead. By understanding those key factors influencing baby boomer adaptation to a changing work environment, HRD professionals will be better prepared to help lead their organizations in the years ahead. Further, by recognizing the limitations of this study and the noted potential research opportunities, HRD professionals will be able to build on this study as well as others.

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Appendix A:

Letter of Introduction

Dear Research Participant:

I am a doctoral student completing my Ph.D. in Leadership and Education with a specialization in Human Resource Development at Barry University. I am conducting a study entitled "Factors Influencing Baby Boomer Adaptation to a Changing Work Environment". The purpose of this qualitative study is to explore and analyze the experiences of baby boomers to identify factors influencing adaptation to their work environment. The goal is to understand how baby boomers have adapted to a changing work environment by gaining insight into their personal experiences. It is hoped that the knowledge gained from this study will be of benefit to baby boomers and human resource professionals in the years ahead.

Your participation in this study is requested. If you agree to participate in my study, all that is required is that you (1) complete a demographic data sheet; (b) be interviewed by myself for approximately 60 to 90 minutes; and (c) review the transcription to ensure the accuracy of the data. With your permission, the interview will be tape recorded so that the tape may be transcribed and I may complete the rest of my work. Additionally, memos, field notes and a reflective field journal will be completed and used by me. Your name will not be associated in any way with the tape recording or transcription and your identity will remain confidential.

Approximately one week prior to the first interview you will be provided with a demographic data sheet and interview guide for your review. The demographic data sheet will ask you to provide the following information: (a) Gender, (b) Age, (c) Race, (d) Years worked in healthcare, (e) Years in management, (f) education level and (g) career information. This sheet shall be returned to me at the time of the first interview. The interview guide will list those questions to be asked during the first interview. This will give you the opportunity to think about your responses prior to our meeting.

Your participation is completely voluntary and you have the right to withdraw my consent or discontinue participation at any time. You have the right to refuse to answer particular questions. If you agree to participate in the study, no discomforts, stresses, or risks are anticipated. There is no benefit except that you will have the opportunity to share your experiences in such a manner as to benefit fellow baby boomers and human resource professionals.

I will be contacting you by phone within one week of sending this letter. You may reach me, Bob Raynor, at (239) 498-6857 if you have any questions.

Thank you for your consideration.

_____
Robert C. Raynor, MA
Doctoral Student, Leadership and Education, Barry University

Barry University Informed Consent Form

Your participation in a research project is requested. The title of the study is <u>Factors Influencing Baby Boomer Adaptation to a Changing Work Environment.</u> The research is being conducted by Robert Raynor, a student in the Education department at Barry University, to seek information that will be useful in the field of Human Resource Development. The aim of the research is to explore and analyze the experiences of baby boomers to identify factors influencing adaptation to their work environment. In accordance with these aims, the following procedures will be used: (a) HR professionals will identify baby boomer middle managers employed in the healthcare field, (b) those identified will be provided with a letter of introduction describing the study, (c) those individuals will be contacted by Robert to verify study criteria are met, explain the process and determine individual interest in participating in the study, and (d) a random drawing will take place to select participants from the total pool of interested individuals. I anticipate the number of participants to be 10.

If you decide to participate in this research, you will be asked to do the following: (a) complete a demographic data sheet, (b) participate in an audio-taped interview conducted by Robert for approximately 60 minutes, and (c) meet a second time for approximately 30 minutes to review the transcription and ask follow up questions, if any.

Your consent to be a research participant is strictly voluntary and should you decline to participate or should you choose to drop out at any time during the study, there will be no adverse effects on your employment.

There are no known risks to you. Although there are no direct benefits to you, your participation in this study may help our understanding of how baby boomers adapt to a changing work environment.

As a research participant, information you provide will be held in confidence to the extent permitted by law. Any published results of the research will refer to group averages only and no names will be used in the study. Data will be kept in a locked file in the researcher's home. Once you have verified the accuracy of the transcription, the audio tapes will be destroyed. Your signed consent form will be kept separate from the data. All data will be destroyed after 5 years.

If you have any questions or concerns regarding the study or your participation in the study, you may contact me, Robert, at (239) 498-6857, my supervisors, Dr. Jia Wang, at (239) 936-6877, and Dr. Betty Hubschman, at (305) 899-3724, or the Institutional Review Board point of contact, Mrs. Nildy Polanco, at (305)899-3020. If you are satisfied with the information provided and are willing to participate in this research, please signify your consent by signing this consent form.

Voluntary Consent

I acknowledge that I have been informed of the nature and purposes of this experiment by Robert and that I have read and understand the information presented above, and that I have received a copy of this form for my records. I give my voluntary consent to participate in this experiment.

_____   _____
Signature of Participant   *Date*

_____   _____
Robert C. Raynor   *Date*

Appendix C:

Demographic Data Sheet

      Please provide the following information requested below. The information will be useful in assessing and analyzing the research data.

(1) Your Gender: M_____   F_____

(2) Your Age: _____

(3) Your Race: _____

(4) Years worked in healthcare   _____

(5) Years in management   _____

(6) Education Level   Non-HS graduate   _____

                                 High School graduate _____

                                 Some College   _____

                                 2 - year Degree   _____

                                 4 – year Degree   _____

                                 Graduate Degree   _____

(7) How many different careers have you had?   _____

Appendix D

Interview Guide

Study Title: Factors Influencing Baby Boomer Adaptation to a Changing Work Environment

Date of Interview: _____
Time of Interview: _____
Location: _____
Interviewer: Robert C. Raynor
Interviewee: Confidential

Thank you for agreeing to participate in this interview process. Your participation will help me to explore and analyze the experiences of baby boomers in adapting to their work environment. A total of 10 baby boomer, health care middle managers will be interviewed. The first audio-taped interview will last approximately 60 minutes and you will be asked to respond to the questions below. The data will be transcribed and a second audio-taped interview of approximately 30 minutes will take place to verify the accuracy of the data and follow up on any areas requiring clarification.

Your participation is completely voluntary and you have the right to withdraw your consent or discontinue participation at any time. You also have the right to refuse to answer particular questions. No names will be assigned to written transcriptions. Your individual privacy will be maintained and held in confidence and all tapes and transcriptions will be securely stored for five years and then destroyed. At the beginning of the interview, you will again have the opportunity to review and sign an "Informed Consent Form" that outlines your rights and safeguards taken during this study.

<u>Interview Questions</u>

(1) How have changes in the work place environment effected you?

(2) How have you adapted to those changes?

(3) How do you perceive the adaptation process in a changing work environment?

(4) What factors have influenced your adaptation?

(5) What factors do you believe are most vital to successful adaptation to a changing work environment?

OBSERVATION PROTOCOL

Title: Factors Influencing Baby Boomer Adaptation to a Changing Work Environment

Participant #: _____   Date: _____   Time: _____

Location: _____

Descriptive Notes	Reflective Notes

OBSERVATION PROTOCOL

Title: Factors Influencing Baby Boomer Adaptation to a Changing Work Environment

Participant #: 1   Date: 01/23/06   Time: 10:00 am

Location: _____

Descriptive Notes	**Reflective Notes**

1 Anxious and reserved
2 Uncomfortable, "not sure why"
3 Very interested in topic
4 Count "flexibility"
5 Manager versus Employee perspective
6 Reconcile perspectives
7 Balance career/personal needs
8 Many don't change easily
9 Explore structure –
10 Conflicting feelings about career and
     personal life
11 Flexibility -survival
12 Technology impact
13 Life long learning
14 Manage different age groups and people
    with different needs
15 Employees – different work/life
    expectations
16 Attitude
17 Diverse work force
18 Employee/organization performance
    expectations conflicts
19 Foreign workers
20 Coworker support
21 Family support
22 Evolving work structures
23 Evolving work ethics
24 Teams
25 Openness
26 Speak English
27 Organizational structure
	1. Took a while to settle down. About 15 minutes to explain process and ground.
	2. Very articulate. Seemed frustrated with work load and ability to balance work requirements with home life.
	3. Interesting career – I knew some people from her home town. Bonded.
	4. Flexibility was a key for her.
	5. Work/life balance important
	6. Roles of teamwork and attitude of workers seemed important
	7. Diverse work force – age, gender, culture
	8. Life long learning, especially technology
	9. Need to be open to change
	10. Health care has evolved a lot since she her career started. Structure, regs, unions, single parents
	11. Different work ethic between NY and FL.
	12. Many employees struggle with reading, writing and speaking English
	13. Bounced back and forth a lot between being a manager dealing with management issues and her own issues of adaptation and personal struggles
	14. Coworker support – support of managers versus supervised employees – buy in and leadership important
	15. With long work hours, if family doesn't support, tough not to bring to work.

Appendix F:

Categories of Codes with Emerging Themes

Research Question #1: Adaptation Process (10000)
    11000 Participant Perceptions
        11100 Technology
        11200 Regulations
    12000 Interaction
        12100 Internal environmental
        12200 External environmental
    13000 Effective Communication
        13100 Employer initiated communications

Research Question #2: Adaptation Factors (20000)

    21000 Flexibility
        21100 Adaptation to meeting organizational versus personal career expectations
        21200 Reconciling differences in personal and organizational work/life expectations
        21300 Adaptation to mergers and acquisition changes
        21400 Openness to new or different ways of doing things
        21500 Accepting and trusting of organizational and management perspectives
    22000 Ability and willingness to learn
        22100 Requires intellect as well as basic English communications skills
        22200 Attitude is critical to learning
        22300 Learning never ends due to work environment changes and the increased
            availability of information
        22400 Openness to the opportunity for personal growth
        22500 Encountering vast amounts of information and determining value and
            application to individual job responsibilities
        22600 Learning how to achieve work/life balance in today's changing work
            environment
    23000 Attitude
        23100 Ongoing change is a process norm to be embraced versus resisted
        23200 Openness
        23300 Commitment to change, learning and achieving life balance
        23400 Intrinsic and extrinsic motivation
        23500 Positive, can do approach
        23600 As value based – integrity and honesty
        23700 Determination and persistence
        23800 Demonstrating interpersonal adaptability
        23900 Embracing new technology

24000 Understanding and working with a diverse workforce
  24100 Diversity is measured in terms of age, culture, gender, family versus no
        family, and management versus non-management
  24200 A diverse workforce brings diverse needs and expectations that may be
        different or non-traditional
  24300 Diversity is manifested in reference points such as music, values,
        perspectives, and traditions
  24400 It encompasses people versus organizationally based cultural adaptability

 25000 Coworker and family support
  25100 Acceptance and buy-in from co-workers
  25200 Family understanding of traditional and non-traditional work requirements
  25300 Lack of support often results in lack of success
  25400 Good relationships lead to trust and teamwork
  25500 Positive and negative reinforcement effects a worker's confidence

 26000 Ability to function in an evolving organizational structure
  26100 Change from a structured to an unstructured work environment
  26200 Generalist based teams co-existing with teams of diversified specialists
  26300 Clearly structured operating parameters with unstructured means to
        accomplish tasks
  26400 Greater need for individual and team based creativity and innovation

Sample of Individual Data in Table Format

Code	Participant	Question #	Line Start	Data	Notes
11100	Aij	1	61	The process has to do with a lot of factors, obviously computer technology has had a huge effect on this adaptation and different ages adapt differently depending on what their limitations are.	
21000/21200 21400	Aij	2	159	I've had to be flexible and that's not my strong suit. I tend to have very structured expectations that to-do list for that day. And I function better in structure and there is nothing structured about health care. So you have to be very flexible with the people around you and the business itself because it doesn't usually go the way you expect it.	
22000/22200 22300/22400	Aij	2	269	You have to be willing to learn new things. Go back to school, take a course, listen to a new way of doing something, and some adult learners, managers at this level, sometimes they go on (I've been in this business 24 year, I know it) But what I've discovered is everyday you can pick up a piece of paper and there's a new way to do something. So you've got to be able to let go a little bit, be willing to open the book and take a new look. You know I've done it this way for 20 years, it works. It works, but maybe there's a different way to look at it and you've just got to be able to do that. Not everybody can.	
25000/25100	Aij	2	286	My coworkers, their support, and their acceptance	

Appendix I

IRB Completion Certificate

Completion Certificate

This is to certify that

Robert Raynor

has completed the **Human Participants Protection Education for Research Teams** online course, sponsored by the National Institutes of Health (NIH), on 08/24/2005.

This course included the following:

- key historical events and current issues that impact guidelines and legislation on human participant protection in research.
- ethical principles and guidelines that should assist in resolving the ethical issues inherent in the conduct of research with human participants.
- the use of key ethical principles and federal regulations to protect human participants at various stages in the research process.
- a description of guidelines for the protection of special populations in research.
- a definition of informed consent and components necessary for a valid consent.
- a description of the role of the IRB in the research process.

- the roles, responsibilities, and interactions of federal agencies, institutions, and researchers in conducting research with human participants.

IRB Approval Letter

Barry University

Institutional Review Board
Office of the Provost and Senior Vice President
for Academic Affairs

11300 NORTHEAST SECOND AVENUE
MIAMI SHORES, FLORIDA 33161-6695
Direct (305) 899-3020
Fax (305) 899-3026

Research with Human Subjects
Protocol Review

To: Robert C. Raynor
From: Doreen C. Parkhurst, M.D., FACEP
             Chair, Institutional Review Board

Date: January 27, 2006

Protocol Number: 06-01-11
Protocol Title: Factors Influencing Baby Boomer Adaptation to a
                    Changing Work Environment

Dear Mr. Raynor:

Thank you for submitting the proposed changes to your recruitment procedures for
protocol #06-01-11. The changes are accepted and you may proceed with the study.

Enclosed is the stamped Consent Cover letter indicating that your protocol has been
reviewed and approved by the IRB. Please use this form when collecting your data.

An annual report form will be sent to you every year until your study is finalized. This
form must be completed and returned to the IRB. Please notify the Board in writing of
any adverse effects experienced by the participants, whether related to the study or not.
Also, please notify the Board in writing if you make any changes to your proposal. When
writing, please refer to protocol 06-01-11.

Thank you and best wishes,

Doreen C. Parkhurst, M.D., FACEP
Chair Institutional Review Board
Assistant Dean, SGMS &
Program Director, PA Program
Barry University
Box SGMS
11300 NE 2 Avenue
Miami Shores, FL 33161

If you have any questions, please contact Nildy Polanco at: 305-899-3020

cc: Faculty Sponsor
****

Note: The investigator will be solely responsible and strictly accountable for any deviation from or failure
to follow the research protocol as approved and will hold Barry University harmless from all claims against
it arising from said deviation or failure. **A Catholic International University**

Appendix K

Dissertation Correction Sheet
School of Education, Barry University

Candidate's Name: Robert C. Raynor

Telephone Home: (239) 498-6857   Work: (239) 598-3191, ext 127

Date to Candidate: June 28, 2006   Date Returned to Chair: July 26, 2006

Page	Paragraph	Line	Correction	Checked
6	2	11-19	Deleted	
8-11	Theoretical Framework	Entire Section	Revised	
49	2	13-20	Moved to p 50 , par 2	
80	Adaptation Process Perceptions section	Entire Section	Expand and strengthen support	
118	Figure 4		Move to p 140, Ch 5 and expand introduction	
121	Title	1	Changed to "Discussion"	
121	Major Themes Title	1	Changed to "Interpretation of Findings	
140	Summary Section	Entire Section	Redone	
142	1 – Third Sentence	4	Delete sentence	

Corrections have been made and approved.

_____   _____
Dissertation Committee Chair, Date   Associate Dean, Date

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