

# **Managing Across the Generations in Canadian Organizations**

**A White Paper from the  
Canadian Council of  
Human Resources Associations'  
2006 National Human  
Resources Forum**

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Canadian Council of Human Resources Associations  
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### **Executive Summary**

Should human resource managers treat the generations differently and create different programs and policies expressly for Elders, Boomers and Gen-Xers? This issue was considered at the 2006 National Human Resources Forum of the Canadian Council of Human Resources Associations (CCHRA) held in Ottawa on June 7, 2006. In addition to affording the opportunity for senior HR executives to network and share perspectives from across the country, one of the objectives of this event was to examine the values of three generations of Canadian employees, Elders, Boomers and Gen-Xers, as identified in Michael Adam's book *Sex in the Snow: Canadian Social Values at the End of the Millennium*, and to ascertain the implications of any value differences for key areas of HR professional competencies. We started with the premise that these three cohorts might need different approaches with respect to such areas as recruitment, compensation, training and development, etc.

In preparation for the meeting, delegates were encouraged to identify their own cohort and "value tribe" by answering a brief questionnaire on the Environics Web site. They were also asked to fill in a rather lengthy survey asking for their opinions about managing the three age cohorts as categorized in Adams' taxonomy. The twenty-three completed questionnaires revealed some very interesting differences among the three generations which were then reported at the meeting. These survey results were followed by a presentation by Michael Adams which concentrated on the six Gen-Xer "value tribes". Starting with the value differences among the tribes, Adams deduced what HR approaches would be necessary to manage them effectively.

In the afternoon, delegates worked with the morning's input and engaged in "café" discussions (See Appendix A for an outline of this discussion methodology) to decide whether or not different approaches were necessary to manage the Boomers and Gen-Xers in the following areas:

- Engagement
- Values
- Staffing
- Compensation
- Skills
- Training and Development
- Employee Relations

It was decided to restrict the afternoon's discussions to the Boomer and Gen-X cohorts only, because of the relatively small number of Elders still active in the workforce.

The results of these discussions produced mixed conclusions. In some areas, there was clearly an identified need for different HR approaches to manage Boomers as opposed to Gen-Xers. Some of these differences may well be a function of age, but others could be a function of a different generational culture which may persist over time. However, the overall conclusion was reached that any differences were not as great as previously suspected and reported in the pre-conference survey. Moreover, the differences between generations are often less important than individual differences among individuals within each of the cohorts. Thus the delegates emphasized the need to understand each employee as an individual and to manage each one individually, rather than relying heavily on group characteristics.

## **Managing the Cohorts**

### **1. Engagement – Table Host: Les Waldie, CHRP, Vice-President, Human Resources, Northern Health and President, British Columbia Human Resources Management Association**

#### *Pre-conference survey results*

The overall response to the pre-conference survey identified very little difference in the overall level of engagement of Boomers versus Gen-Xers in the Canadian workplace, but described the Elders as less engaged. Respondents generally described Boomers as hard workers, career oriented, and eager to make a difference. Gen-Xers were described as eager, full of ideas, but more insistent on maintaining work-life balance than their elders and quick to disengage or leave the workplace if it does not live up to their expectations. As for Elders, respondents stated that if their jobs are interesting or rewarding, they are somewhat engaged, but many have ‘plateaued’ and are thinking of retirement. However, if offered creative or contractual post-retirement options, some would respond favourably.

In the area of work-life balance, a clear distinction emerged among the three cohorts. More individuals within the Boomer cohort were reported as being likely to focus exclusively on work than in the other two groups, and more Gen-Xers as likely to focus mainly on non-work activities. However, all three groups contained many individuals who preferred more balance between the two.

#### *Summary of discussions*

The afternoon discussions concluded that employee engagement is essentially a product of leadership and that leaders need to focus on individual employees rather than on grouping them by age cohorts.

Engagement is a product of leadership:

- a. Leaders need to understand the individuals they are leading rather than making blanket assumptions about how people will react based on age alone.

- b. Individuals need a line of sight between their work and its impact on the business. Leaders must articulate a clear vision, mission and values for their employees.
- c. Leaders need to create an environment where people are treated fairly, respectfully and honestly. Leaders should understand that employees join a company, but leave a manager.
- d. Individuals need recognition for what they do. Leaders need to understand differences in staff members, and be clear about individuals' strengths and weaknesses so they can organize work to capitalize on strengths and minimize weaknesses.

***Discussion details: Engagement is a product of leadership***

- a. Leaders need to understand the individuals they are leading.
  - For example, some Boomers are facing 'plateauing' (i.e. advancement opportunities limited) and so leaders have to create opportunities to keep them challenged. This is not an issue with Gen-Xers who are still in a developmental pattern.
  - Leaders must take time to understand what is important to each individual and how the work to be done can be structured to align with what is important to the individual – hence the need to create conversation individually.
- b. Individuals need a line of sight between what they are doing and its impact on the business.
  - Leaders need to articulate strategic orientation and key results required.
  - Leaders should accord individuals some flexibility and accountability for how work is done, including process changes, so the outcomes are both a clear line of sight and engaged staff.
  - People in general, including both Boomers and Gen-Xers, need to feel they are making a difference.
- c. Leaders need to create an environment where people are treated fairly, respectfully and honestly.
  - Rewards should be non-monetary as well as monetary.
  - Leaders should realize that Gen-Xers tend to view fairness as recognition of individual contribution while Boomers regard fairness as equal treatment for all.
  - Leaders must realize that Gen-Xers tend to speak up and challenge more than Boomers, although this rule is not without exceptions.
  - Both Gen-Xers and Boomers need to feel part of a group.
- d. Individuals need recognition for what they do.
  - Gen-Xers more than Boomers need to feel they are receiving full reciprocity from the organization (i.e. personal development, balanced lifestyle along with fair treatment) in exchange for their commitment and contribution.

- Regardless of their age group, people generally embrace the concept – tell me how I am doing and recognize me in a way that positively impacts me.
- Gen-Xers value individual recognition and rewards which tend to be in contrast to union values.

**2. Values – Table Host: David Law, LLB, Partner, Emond Harnden LLP**

*Pre-conference survey results*

The survey asked respondents to identify the most salient values of the three generations. Table 1 reports the top five for each cohort.

**Table 1  
Top Five Workplace Values of the Three Generations**

<b>Elders</b>	<b>Boomers</b>	<b>Gen-Xers</b>
<b>Loyalty</b> <b>Hard Work</b> <b>Deference</b> <b>Seniority/Entitlement</b> <b>Sense of Duty</b>	<b>Recognition</b> <b>Hard Work</b> <b>Loyalty</b> <b>Challenge</b> <b>Respect</b>	<b>Challenge</b> <b>Flexibility</b> <b>Rewards/Pay</b> <b>Independence/Self-reliance</b> <b>Choice/Control/Freedom</b>

It is interesting to note that respondents reported only two perceived value commonalities between the Elders and Boomers, only one between the Boomers and Gen-Xers, and none between the Elders and Gen-Xers. These findings may reflect reality, may be stereotypes and/or may be a function of each cohort’s stage of life rather than a real evolution in generational values in Canadian society. However, further survey questions revealed a markedly higher desire for input into decision making and for challenging work on the part of Gen-Xers than the other two cohorts.

*Relating the pre-conference survey to Sex in the Snow*

Because *Sex in the Snow* deals primarily with values, this paper will attempt to relate the values reported in the pre-conference survey to those in Adams’ work. Appendix B describes Adams’ categorization of the different value sets of the tribes within two of the cohorts – the Boomers and Gen-Xers. By comparing Adams’ taxonomy of the values of the nine different Boomer and Gen-X tribes with the reported values of the Boomers and Gen-Xers listed above, we find little overlap, but that should pose no surprise, as Adams addressed general values as opposed to workplace values. However, the values in the above Table do appear in the value sets of the Boomer tribes Adams calls “Anxious Communitarians” and “Autonomous Rebels” and the Gen-X tribes Adams calls “Autonomous Post-Materialists” and “Thrill-Seeking Materialists”. Nonetheless, it would be premature to conclude that the workforces of the organizations represented by our delegates are composed of a disproportionate number of the above value tribes.

It proved to be extremely difficult for the delegates to use Adams' fine-grained analysis to inform their discussion of the implications of value differences between Boomers and Gen-Xers, for the purpose of connecting them to HR practices and competencies.

### ***Summary of discussions***

This table concluded that there is a natural evolution of values that takes place as a cohort ages and goes through the cycles of life. Although the three generations may appear to hold very different values, much of these differences can be explained by the stage of life each cohort is experiencing. The values themselves are relatively constant.

### **3. Skills – Table Host: Christine Chater, CHRP, Consultant, Staff Bureau, and Past-President, Human Resources Institute of Alberta**

#### ***Pre-conference survey results***

Respondents to the pre-conference survey reported that on average, Boomers possessed a higher level of both general and communications skills than the other two cohorts. Respondents suggested that the different cohorts may exhibit skills in different areas, for example, Gen-Xers generally have stronger computer skills.

#### ***Summary of discussions***

The discussion groups had a rich discussion on this topic. They concluded that in managing Boomers the organization should create a culture that is flexible with respect to skill development – one that supports succession planning and respects the Boomers' backgrounds and skills while avoiding roadblocks for the younger generations. Boomers should be given opportunities to mentor and to undertake interesting projects. In general they are interested in increasing their skills in new and different areas and in knowing how skill development is linked to compensation increases. Organizations should not lose the expertise of this group and when they are close to retirement, they should be given contract opportunities to continue to contribute their skills to the organization.

With respect to Gen-Xers, the organization needs to paint the big picture of what skills are valued and what the trade-off is for their skills – then let them perform and give them feedback. Gen-Xers want access to the latest tools, have different learning styles, and are savvy about teamwork and computer systems.

The group recommended that organizations take a macro view of skills and emphasize strategic business acumen, task orientation and decision-making expertise. One of the best ways to do this would be to blend teams of Gen-Xers and Boomers.

In summary, the group suggested that organizations must be flexible enough to capitalize on the various skills of their employees. They also recommended implementing the following to leverage the skills of the two generations:

<b>Boomers</b>	<b>Gen-Xers</b>
Reverse mentoring External life/executive coaching Alternative work structures	Build in recognition and feedback Leverage energy to learn (team learning) More flexibility around total compensation plans

**4. Staffing – Table Host: Anne Charette-Tyler, CHRP, President, The Burke Group and Past-President, Canadian Council of Human Resources Associations**

*Pre-conference survey results*

Respondents generally stated that some Elders still want to be active in the workforce and have much to offer, but employers wanting to recruit them will have to be flexible enough to respond to their desire for fewer hours and less mobile work. To recruit Boomers, organizations should keep in mind that they are looking for challenge, career advancement and perhaps an increase in pay. Gen-Xers were seen as tricky to recruit because they are generally very selective and hard to satisfy. Many are unwilling to start at the bottom and are anxious to advance. Furthermore, they are more demanding with respect to flexibility, best tools and technologies and opportunities to learn.

To retain Elders, benefits, security, good work and pay and a respectful environment were the most important factors. They were most likely to be loyal to the organization and most reluctant to move. Gen-Xers, on the other hand, are mobile and conscious of other employers and opportunities. To retain this group, organizations must ensure they have the best compensation package, challenging work, a good brand, ethics and flexible policies. Finally, Boomers are easier to retain than Gen-Xers and value good working relationships, benefits, interesting work and career progression as much as money. They are more likely to weigh all of these factors before switching employers.

*Summary of discussions*

When managing Boomers we should remember above all that they want respect. In terms of recruitment, organizations should communicate the brand. In order to retain Boomers, employers need to establish the value proposition, create a flexible work environment, validate and introduce recognition programs, and institute a progressive two-way performance management program.

By contrast, the group concluded that Gen-Xers want empowerment above all. So managers should remember not to treat them as a homogenous group, but to adapt both the selection and interview processes to each individual. Organizations should use the language of attraction (but be real), and should not sell what they cannot deliver. The group advised not to say you are an employer of choice, but to be it. Gen-Xers may believe that if you have to say you are an employer of choice, you probably

are not. Public sector organizations are not considered sexy by Gen-Xers and will have to brand themselves carefully to meet Gen-Xers values.

Employers should understand clearly what they need in an employee – define the core work, the level of skill required, etc., and then hire for success. They must try to remove any barriers posed by pensions, taxes, immigration policies, accreditation, and so forth. Other ideas are: to develop partnerships and to outsource, to buy your supply chain as a source of talent, or to look to global markets and use them creatively by using the global clock. In other words, move some of your work instead of your people if your organization uses a 24 hour project process.

The group concluded that most employers don't have a true understanding of needs so they often hire the wrong people. They would also profit by making better use of contingent workforces to do more with less and by always keeping the door open for past employees. In the public sector, explore collaborative sourcing and encourage agencies to share or move staff.

## **5. Compensation – Table Host: Reggie Delovitch, MBA, CHRP, Executive Director, Canadian Council of Human Resources Associations**

### ***Pre-conference survey results***

The pre-survey identified several salient differences that have implications for compensation. Boomers and Gen-Xers were reported to place more focus on higher salaries, career advancement and various forms of recognition than do Elders. Elders are more likely to be satisfied with total compensation and are more interested in benefits and pensions than Boomers, whereas Gen-Xers scored low on these two measures. Respondents also agreed that Gen-Xers are more likely to respond positively to success pay, with Boomers and Elders less enthusiastic. Gen-Xers want to receive frequent feedback, especially if it is tied to development, but will challenge it if they do not agree. On the other hand, Boomers are more likely to be cynical about performance evaluation and want proof of accurate measurement of goals and specific action plans. Finally, Elders were most likely to consider performance evaluation a 'necessary evil.'

### ***Summary of discussions***

Boomers want compensation programs that are flexible. This implies using compensation dollars in flexible ways to meet their various needs since there are different groups within the Boomer generation and one size does not fit all. Although benefits are critical retention issues for most, wages and salaries and incentive pay are also important to many. The key is to make sure those you want to retain are satisfied with the company's total compensation and rewards programs. For example, long service skilled and knowledge workers may need additional compensation incentives to remain in the workforce once they have maxed out their pension plan payout. Unfortunately, in unionized environments, collective agreements can hamper opportunities for flexibility and incentive/additional payments. Employers should note that Health Spending Accounts (HSAs) can serve as a very useful tool in providing flexibility for total compensation dollars; for example, employees could take

additional vacation money out of their personal HSA or transfer dollars into a security program. However, for HSAs to be effective, employees need to understand the actual costs of medical coverage they receive under an HSA, and cost control mechanisms must be built in. Employers should analyse how much and where they can rely on government coverage and should also decide if the HSA is to be continued for retirees and if so, in what manner. Values will also impact the HSA – for example who receives coverage – families or individuals?

For Gen-Xers as well, compensation programs need to be more flexible. The standard definition of what is included in compensation needs to be reviewed and expanded, with an appreciation that this may be more difficult to accomplish in certain settings. One message to Boomer bosses is to try and remember what they were looking for in compensation at that age. Gen-Xers are more aware of market pay levels than previous generations, have easy access to internet surveys and are less loyal to companies than previous generations. As the labour market gets tighter, some companies should be willing to hire back ‘leavers.’ Gen-Xers question structured salary scales and want to be paid based on contribution to the organization. They have more tolerance for pay at risk, but not benefits at risk. Employers should strive for creativity in benefits and make it interesting for Gen-Xers. Examples of what works for this generation: investments in self awareness training opportunities, collegial working environment, team compensation, and extra vacation.

**Summary:** For both groups, employers should be more flexible in the design of total compensation/rewards programs. They must provide more choices on how compensation dollars are spent in order to accommodate different needs. Start thinking about total compensation as a patchwork quilt of different offerings you can make available to your work force to ensure that you meet their needs at different stages of their life cycle. Segmentation in provision of total rewards can be a way of retaining key skills and becoming an employer of choice. However, one important consideration is the tax treatment of total reward dollars. Current rules may hamper flexibility and HR managers may need to review them and suggest changes.

Within the total compensation budget, consider offering flexibility in the following areas:

- Monetary compensation
- Workplace tools (e.g. computer)
- Training and Development (T & D)
- Work assignments
- Pension
- Benefits
- Flexible working schedules (e.g. part time, etc.)
- Vacation (identified as important to both boomers and Gen-Xers)

**6. Training and Development – Table Host: Lynda Murray, CHRP, Managing Partner, L. Murray and Associates Incorporated and Past-President, Saskatchewan Association of Human Resource Professionals**

*Pre-conference survey results*

Respondents to the pre-survey generally agreed that the ability to learn and apply new skills in the workplace diminishes with age. As for Elders, attitudes towards training vary significantly with the individual. Boomers, by contrast, are generally interested in continuous learning, especially if it enhances career advancement. Gen-Xers expect employers to provide lots of opportunities to learn and are most likely to ‘soak it up’. Training and development should be designed with the generations in mind. Elders will respond well to classroom, lecture style or on-the-job training, but generally will not accept on-line approaches. Gen-Xers, on the other hand, prefer self-study and e-learning, but are open to most methods. Boomers’ preferences vary with the individual, but as a group most methods will work for them.

*Summary of discussions*

Boomers like interactive, relevant training and prefer one-on-one coaching and intellectual discussion to traditional classroom instruction. Stretch projects, leadership development programs and self-assessment tools are appreciated. Employers should encourage Boomers to be active partners in their development and this requires constant discussion of career plans, co-design of training, transparent competency inventories for all positions, good succession planning, and the opportunity to apply and sustain the learning after development initiatives. A good organizational audit, surveys, and individualized discussions can help organizations plan training and invest in knowledge management rather than looking upon T&D as a mere expense. Some boomers would enjoy mentoring younger employees, as well as being mentored themselves.

Gen-Xers, in contrast to Boomers, respond more to self-directed learning, continuous learning and on-demand access to training. They like online, e-learning, high-tech capabilities, multi-site and offsite access to training, and team learning opportunities. With Gen-Xers, training and leadership development are essential to retention.

Similarly to Boomers, Gen-Xers appreciate being full partners in their training plans and want flexible, relevant and individualized plans, and opportunities to apply their learning. For Gen-Xers, however, the organization may need to moderate expectations of rapid promotion from training and give them constant feedback. Also, for this group in particular, employers should link training to compensation and should make a genuine commitment to continuous learning.

Employers could profit from purposefully cross-pollinating Boomers and Gen-Xers during training, as learning can break down barriers between the generations. Furthermore, although training should often be linked to the job, any type of training is valuable and should be recognized by employers. Fundamentally, the two generations are quite similar in their response to training, although their learning styles and preferences for delivery methods may differ.

## **7. Employee Relations – Table Host: Paul Juniper, CHRP, SPHR, Director, Industrial Relations Centre, Queen’s University and Past-President, Human Resources Professionals Association of Ontario**

### *Pre-conference survey results*

Boomers are more likely to be involved in unions, associations and collective bargaining than the other two cohorts. Furthermore, they are more knowledgeable about their rights, more skilled in conflict resolution, and many are strong advocates of employee rights. Some Gen-Xers and Elders are also quite aware of employee rights, but others do not consider them a high priority. Gen-Xers as a whole were considered the least skilled in conflict resolution.

### *Summary of discussions*

The group offered the following suggestions for managing Boomers:

- Treat them as individuals
- Use guidelines rather than policies and rules
- Reward and recognize loyalty and service
- Remember commitment may be temporary and it no longer equals loyalty
- Be sensitive to ways of transferring knowledge and do not dismiss what was done in the past

About managing Gen-Xers, the group recommended:

- Assess them on skills, abilities and performance and not on length of service
- Have a success plan, manage the talent and create career paths for them
- Maintain a balance between work culture and personal expectations

Creative approaches that organizations should consider include:

- Using a “Situational Leadership” model to individualize managerial approaches to employees
- Identify leadership potential, select and groom individuals for leadership positions
- Provide training and development to fill gaps
- Identify the **what** and let employees figure out the **how**
- Have fewer “rules” and more “guidelines”

In summary, the group reiterated that HR management is a key strategic partner for organizational success, because business is all about the people. Thus the key role for human resources is to live, know and be the culture of the organization. HR managers should live the personality of the organization, embrace authenticity, passion and ambassadorship – in other words, be real.

## **Conclusions**

CCHRA’s 2006 National Human Resources Forum produced a lot of intense discussion and some tentative conclusions about human resource approaches to managing across the generations. At the end of the day, managing across the

generations should not be regarded as hopelessly complex. The differences between generations are often less important than individual differences among individuals and employers are urged to get to know each employee and to manage each one individually. Nevertheless, the day produced much valuable advice for human resource managers. Some of the advice was specifically directed toward managing Boomers and Gen-Xers as a group, and more importantly, suggestions were made for managing with optimal flexibility.

These suggestions are summarized as follows:

1. Employee engagement is essentially a product of the organization's leadership. Leaders must pay attention to important fundamentals such as articulating a clear vision, mission and values, creating an environment where people are treated fairly, respectfully and honestly, and providing individuals with appropriate recognition. Leaders should focus more on knowing their individual employees rather than on grouping them by age cohorts.
2. Organizations should take a macro view of employee skills and emphasize creating strategic business acumen, task orientation and decision-making expertise. One of the best ways to do this would be to blend teams of Gen-Xers and Boomers. For Boomers, reverse mentoring, external life/executive coaching and alternative work structures would be particularly effective. For Gen-Xers, build in recognition and feedback, leverage energy to learn (team learning) and build more flexibility around total compensation plans to include skills development.
3. Recruitment and Retention: Boomers want respect and so employers recruiting them should establish a value proposition, create a flexible work environment, validate and introduce recognition programs, and institute a progressive two-way performance management program. Gen-Xers want empowerment so use the language of attraction (but be real), and do not sell what you cannot deliver. Adapt both the selection and interview processes to each individual Gen-Xer.
4. Furthermore, in terms of recruitment, employers should understand clearly what they need in an employee – define the core work, the level of skill required, etc., and then hire for success. They must try to remove any barriers posed by pensions, taxes, immigration policies, accreditation, and so forth. To increase the recruitment pool, develop partnerships, outsource or buy your supply chain as a source of talent. Look to global markets and move some of your work instead of your people if possible.
5. For both Boomers and Gen-Xers, employers should be more flexible in the design of total compensation/rewards programs. They must provide more choices on how compensation dollars are spent in order to accommodate different needs at different stages of their life cycle. Segmentation in provision of total rewards can be a way of retaining key skills and becoming an employer of choice.
6. Within the total compensation budget, consider offering flexibility in monetary compensation, workplace tools, T & D, work assignments, pensions and benefits, flexible working schedules, and vacations.
7. Both generations appreciate being full partners in their training plans, both need flexible, relevant and individualized plans, and opportunities to apply their learning. Organizations should consider cross-pollinating Boomers and

Gen-Xers during training, as learning can break down barriers between the generations. Furthermore, the two generations are quite similar in their response to training, although organizations should design training with their different learning styles and preferences for delivery methods in mind.

8. With respect to employee relations, employers should consider having fewer “rules” and more “guidelines”. Identify the **what** and let employees figure out the **how**.
9. And finally, the key role for human resources is to live, know and be the culture of the organization. Human resource managers should live the personality of the organization, embrace authenticity, passion and ambassadorship – in other words, be real.

## Appendix A

### World Café Discussion Methodology

World Café Conversations are an intentional way to create a living network of conversation around questions that matter. A Café Conversation is a creative process for leading collaborative dialogue, sharing knowledge and creating possibilities for action in groups of all sizes.

***The methodology of the World Café is simple:*** The environment is set up like a café, with tables for four to eight people, tables covered by paper tablecloths, flowers, some coloured pens and, if possible, candles, quiet music and refreshments. People sit at each table and have a series of conversational rounds lasting from 20 to 45 minutes about one or more questions, which are detailed below. At the end of each round, one person remains at each table as the host, while each of the others travels to other tables of their choosing. They do not travel as a permanent group. Table hosts welcome newcomers to their tables and share the essence of that table's conversation so far. The newcomers add anything they would like to the first conversation – and then the conversation continues, deepening as the round progresses. At the end of the second round, participants move to another table of their choosing, add to the first two conversations and then explore a third and final question. Finally, everyone returns to his or her original table and prepares a report for the entire group about their table's topic. The whole group then gathers to share and explore emerging themes, insights, and learnings, which are captured on their tablecloths and posted on a wall for all to see. The collective intelligence of the whole group is visible to everyone so they can reflect on what is emerging in the room. At this point the World Café ends.

***The seven design principles of World Café are:***

- Set the context
- Create hospitable space
- Explore questions that matter
- Encourage everyone's contribution
- Cross-pollinate and connect diverse perspectives
- Listen together for patterns, insights, and deeper questions
- Harvest and share collective discoveries

**Questions:**

**Round One:** What is important for HR professionals to realize about managing Boomers with respect to \_\_\_\_\_ (engagement, values, skills, staffing issues [emphasis on recruitment and performance evaluation], compensation, training and development or employee relations)?

**Round Two:** What do we want to add to the conversation of Round One? What differences, if any, do we have to pay attention to in managing Gen-Xers with respect to \_\_\_\_\_ (engagement, values, skills, staffing issues [emphasis on recruitment and performance evaluation], compensation, training and development or employee relations)?

**Round Three:** What do we want to add to the conversations of Rounds One and Two? Summarize and report on your conversations about managing the two generations with respect to \_\_\_\_\_ (engagement, values, skills, staffing issues [emphasis on recruitment and performance evaluation], compensation, training and development or employee relations)? What creative ideas do we have or what creative approaches can we take?

**Report:** Create a summary report on your tablecloth and be prepared to post it in 15 minutes. It should include three to five points about managing Boomers, three to five points about managing Gen-Xers, three to five creative ideas or approaches and your group's insights from discussing the topic.

**The process of the World Café.** What happens at those "local tables" mimics the larger global dance of interlinking conversations, of which it is a part. The core process goes something like this:

1. The host/hostess creates a pleasant, warm, intimate environment – perhaps some music, flowers, candles. He or she welcomes participants and tells them (or reminds them of) the topic – a question worth asking or statement worth exploring, of real interest to those present.
2. There are a number of tables, and four to eight people sit at each one. Each table has a paper tablecloth and some marking pens.
3. The hostess/host explains that after a set period of time (usually 20-45 minutes) people will be asked to bring the conversation to a close and move to new tables. S/he encourages them to record on the tablecloth any ideas, insights or questions that emerge. A section on the tablecloth should be used for a summary of the conversations. Or one of the participants (not the host/hostess) can summarize the conversations on the flipchart.
4. When the first round is up, the host/hostess rings a bell or chime and says, "Each table has a host or hostess who will remain at the table for the whole session. In a minute, I will ask the rest of you to get up and move to different tables". When everyone is seated in their new places, the home table host or hostess will welcome the new people and share with them key ideas and questions that emerged from that table's earlier discussion. Then the participants will discuss Round Two's question. And so forth for each successive round.
5. At the end of the three rounds, the overall hostess/host asks everyone to return to their home tables to compare notes with their original companions. The original table group from Round One will then prepare a summary report on their tablecloth (use the one underneath if the top one is too messy to read) and post it for all to see.
6. (Gallery Tour) The whole group tours the tablecloths and reads the various discussion summaries.
7. The host/hostess will then lead a discussion of the entire group to draw together the threads of the various discussions.

8. The table hosts will take the tablecloths and transcribe the discussions and send them to the overall hostess for inclusion in the final report. They should feel free to add explanations if some of the points seem obscure. (This duty is necessary because only the table hosts will understand some of the points in the summary.)

### **Share collective discoveries**

Conversations held at one table reflect a pattern of wholeness that connects with the conversations at the other tables. The last phase of the Café involves making this pattern of wholeness visible to everyone. To do so, hold a conversation between the individual tables and the whole group. Ask the table groups to spend a few minutes considering what has emerged in their Café rounds that has been most meaningful to them. Distill these insights, patterns, themes and deeper questions down to the essence. It can be helpful to cluster this aspect of the conversation by asking for one thing that was new or surprising and then asking people to share only those ideas which link and build on that particular aspect. Make sure that you have a way to capture this, either on flip charts, or even their table cloths which can then be taped to a wall so that everyone can see them. After the report out, the whole group may wish to take a few minutes of silent reflection and consider:

- What is emerging here?
- If there was a single voice in the room, what would it be saying?
- What deeper questions are emerging as a result of these conversations?
- Do we notice any patterns and what do those patterns point to, or how do they inform us?
- What do we now see and know as a result of these conversations?

## Appendix B Comparison of Boomer and Gen-X “Value Tribes”

Michael Adams in *Sex in the Snow*, categorizes Boomers and Gen-Xers into value tribes along two dimensions:

- Outer-Directed versus Inner-Directed
- Conformity and Exclusion versus Individualism and Idealism

These dimensions create four quadrants into which he further statistically categorizes the two groups, according to their responses to his values survey. The table below summarizes this categorization by quadrant and value tribe, along with the major values held by each tribe.

	<b>Quadrant:</b> Outer-Directed plus Conformity and Exclusion  <b>Mental Posture:</b> Social Success, Materialism and Pride	<b>Quadrant:</b> Inner-Directed plus Conformity and Exclusion  <b>Mental Posture:</b> Security, Stability and Exclusion	<b>Quadrant:</b> Outer-Directed plus Individualism and Idealism  <b>Mental Posture:</b> Experience and Personal Development	<b>Quadrant:</b> Inner-Directed plus Individualism and Idealism  <b>Mental Posture:</b> Autonomy and Well-Being
Boomer Tribes	Anxious Communitarians	Disengaged Darwinists	Connected Enthusiasts	Autonomous Rebels
Boomer Values in each Tribe	-Consumerism -Deference to authority -Need for respect	-Self-interest -Desire for money -Social Darwinism -Simplicity -Rationality	-Self-exploration -Community -Experimentation -Hedonism	-Skepticism toward traditional institutions -Question authority -Freedom -Individuality
Gen-X Tribes	Social Hedonists	Autonomous Post-Materialists	Security-Seeking Ascetics	New Aquarians
Gen-X Values in each Tribe	-Risk taking -Aesthetics -Sexual permissiveness -Immediate gratification	Thrill-Seeking Materialists -Desire for money and material possessions -Desire for respect, recognition and admiration -Aesthetics	-Security -Simplicity -Delayed gratification	-Adaptability -Concern for less fortunate and environment -Respect for education -Contempt for traditional authorities -Hedonism

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