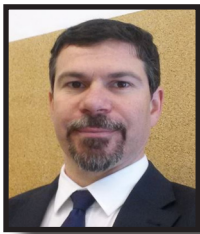


The Voice of Experience—Older Workers’ Accounts From a Portuguese Organisation

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Abstract

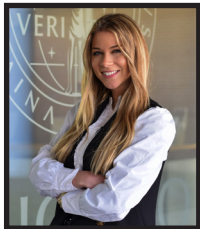


workforces and change management.

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This study aims to analyse perceptions about Human Resource Management (HRM) practices in a Portuguese industrial company characterised by an aging workforce. It also discusses to what extent age segmentation in HRM practices contributes to the productive inclusion and well-being of older workers. Emphasis is given to the mentoring process. This qualitative research is divided into two stages, two years apart: In the first stage, 10 blue-collar workers are interviewed about the perceived effects of HRM practices and, in the second stage, nine interviews with mentors, mentees, and HR managers are combined with the analysis of documents to analyse the (de)merits of the mentoring in force in the company. This study adds workers’ perspectives to the HR managers’ perspectives on the productive inclusion of older workers, and it contributes to the debate on career extension by showing the benefits older workers bring to the organisation through formal mentoring programmes.

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The increase in the relative weight of older workers (workers aged 50+ according to OECD, 2006) in the work context is a recent phenomenon in most European countries (Boehm et al., 2014). This trend poses socioeconomic challenges and concerns, with impacts on the labour market. Although a few pockets of resistance to a longer stay of the older workers in the organisations remain, the progressive postponement of the retirement age is here to stay (van Dalen et al., 2010). For that reason, it is likely that the implementation of HRM practices directed to the older workers—here referred to as age segmentation—may be useful for the inclusive and productive retention of this age group. Given the increase in the presence of older workers in contemporary organisations, it is important to know the success factors of the HRM practices so as to inform the managers which interventions are more fit to face the recent reconfiguration of the organisations' age mosaic. Following this line of reasoning, this research aims at analysing and understanding the older workers' perceptions of these practices, namely their (de)merits. Thereto, it uses the contributions of the signalling theory (Connelly et al., 2011), the social exchange theory (Blau, 1964), and the social identity theory (Tajfel & Turner, 1979). This research aims at analysing, in particular, whether some of these practices may have the opposite effect of the expected outcome, namely because they can be perceived by the workers as stigmatising practices which highlight negative stereotypes about the older workers (Kooij et al., 2008). Reciprocally, this study aims at identifying the practices that underline the qualities and the positive characteristics of such workers (Oliveira & Cabral-Cardoso, 2018a), hence reinforcing their positive social identity (Tajfel & Turner, 1979) and inducing productive attitudes and or behaviour (Blau, 1964). As the productive retention of the older employees requires not only interventions regarding their characteristics and needs but also the management of practices that contribute to the construction of a positive social identity and the recognition of their productive capacity, this research contributes to the debate on the virtues and risks of organisational age management strategies (Oliveira & Cabral-Cardoso, 2018b).

On the other hand, by shedding light on the workers' perspective, this research aims at widening

the range of available understandings of the HRM practices, bringing it together with the perspective that caught the researchers' attention in the first place, the perspective from the managers in charge of implementing such practices (Kooij et al., 2014). In addition to analyzing the meaning these targeted practices encompass (Hennekam & Herrbach, 2015), this work also focuses on practices targeted at the entire organisation, here labelled as universal practices. To pursue its objectives, this research explored the perceptions of manufacturing workers from a large organisation based in the North of Portugal. It followed a qualitative methodology that relied on interviews and analysis of documents. This context is characterised by a heavily aged workforce and by remarkable physical demands. For that reason, this context may largely benefit from the findings of this research. It is also worth mentioning that this research was developed in two stages, two years apart. In the first stage, the research focus is on the perceptions of the older workers about the perceived effects of the HRM practices. The meaning given to segmented and universal practices in force in the organisation and practices that have not yet been implemented was discussed. It is important to mention right away that the two-stage design of the research makes it possible to move forward with one of the practical implications of this study. As a matter of fact, the findings from the first research stage enabled the organisation to be informed about the HRM practices the older workers value the most. For that reason, the second stage of this work focused on a specific HRM practice—mentoring, a practice that was not implemented when the first stage took place. The analysis in this second stage was then grounded on the mentoring process in use in the organisation as a strategy for the productive inclusion of the older workers.

Literature Review

Business success comes more and more from efficient human capital management—employees' attraction, motivation, and retention—and for that reason, the organisations' uniqueness relies more and more on its workers (Burke & Cooper, 2006). The alignment of the HRM processes with the organisations' strategic objectives is then imperative,

as effective practices can lead the workers to give back by increasing their commitment, their well-being, and by performing better (Blau, 1964; Kooij et al., 2014). Under the scope of its strategic goal, HRM is being challenged to adapt on a regular basis to the changes in the internal and external environments; the phenomenon of the recent demographic changes has an impact on both environments (Burke & Cooper, 2006). Consequently, the increase in the proportion of older workers in the organisations is an undeniable circumstance that stimulates the managers to consider the implementation of HRM practices for this population (van Dalen et al., 2010). Moreover, from a theoretical standpoint, a comprehensive understanding of the organisational factors that underpin late-career development is still missing (Akkermans & Kubasch, 2017).

Age Management: Inclusion Strategies for Older Workers

The search for new ways to manage older workers and get them motivated to participate actively in the labour market is a challenge posed to managers and academics alike (Burmeister et al., 2021; Kooij et al., 2014). This search triggers the following question: are the so-called universal HRM practices enough to retain and motivate the older workers? Some authors give a negative answer; hence it is important to investigate how can segmented HRM practices influence, for instance, the older workers' decision to postpone retirement and remain active (Kooij et al., 2008). Some practices have already been pointed out as effective thereto. A few examples are the practices designed to increase the recognition and the valorisation of this population's professional experience; the practices that ease the productive demands and decrease the work's severity; and the practices focused on developing the older workers' competencies (Kooij et al., 2014). From a theoretical point of view, it is possible to say that such practices signal to the target workers that they are valuable members of the organisation and worthy of organisational support (Armstrong-Stassen, 2008; Connelly et al., 2011). Notwithstanding, there is a simultaneous risk that these workers associate those segmented management practices with the fact that the managers have negative stereotypes about the capacity of the older workers, and for that reason, they implement

such practices. That interpretation may promote an unwanted climate of discrimination in the labour context by reinforcing age stereotypes about older workers (Hennekam & Herrbach, 2015; Kooij et al., 2008; North & Fiske, 2015). Such decisions may be sanctioned by law and can be expensive and counterproductive, as the companies run the risk of hiring, promoting, and training younger workers that may be less productive and more expensive than their older colleagues (Posthuma & Campion, 2009). Furthermore, a person shall be judged by their individual capacities, not by the average capacities of the group they belong to (McDaniel et al., 2012). Empirical evidence shows that though, on average, the older workers do suffer variations in their performance, not all of them show a decline in their performance (McDaniel et al., 2012). These interventions may then assume several meanings, and one of them may lead the older workers to feel labelled as members of an undervalued social group (Hennekam & Herrbach, 2015). For these reasons, managers must be aware of age stereotypes for the sake of their own decision-making processes and the organisation's social environment.

Stereotypes About Older Workers

Although the information collected in a first social contact is subject to several biases, three types of information are immediately and universally categorised: gender, age, and ethnicity. These three major social categories tend to dominate people's perceptions of others (Hogg & Cooper, 2007). Since age corresponds to a significant signal that is highly visible and easily noticeable, age categorisation contributes, via stereotypes, to the definition of one of the most relevant social identities in a context of growing age diversity in the organisations (Boehm et al., 2014). According to the social identity theory (Tajfel & Turner, 1979), the participation in groups and the social identities that result from that sense of belonging play a crucial role in intergroup relations by shaping the individuals' perceptions, attitudes, and behaviour. The individuals are intrinsically motivated to reach and maintain a positive social identity, and, consequently, they identify themselves with groups that foster their self-improvement and increase their self-esteem. Despite the coexistence of positive and negative stereotypes about the older workers (e. g., more reliable and less open to change,

respectively), the latter prevails (McDaniel et al., 2012; Posthuma & Campion, 2009). Therefore, it is more likely that managers have negative stereotypes about the older workers, which, even unconsciously, interfere with the way they think about those workers (Posthuma & Campion, 2009; van Dalen et al., 2010). If this is the case, both the labour market as a whole and the employer organisations may lose the opportunity to capitalise on the older workers' qualities and competencies due to myths and misconceptions about the real capacities of such workers (Armstrong-Stassen, 2008; Posthuma & Campion, 2009; Raineri, 2018).

Taking these considerations together emerges the need to listen to the targets of the HRM practices organisations implement or plan to implement to manage older workers. It is important to go beyond mere identification of the intended effects according to the architects of those practices—the managers—and understand the meaning the workers confer to those practices. From this rationale, the following research questions emerge:

Q1. What are the older workers' perceptions about the HRM practices—specially the age-oriented ones—implemented in the organisation?

Q2. What are the perceptions of the older workers about the age-oriented HRM practices that have not yet been implemented in the organisation?

Despite the prevalence of negative stereotypes about older workers, older workers' knowledge is, in many sectors, a critical determinant of workplace performance. Consequently, the organisations shall adopt practices that capitalise on their older workers' experience. One of the most common examples of doing so is the mentoring arrangement.

Mentoring

According to Armstrong-Stassen (2008), by focusing the HRM practices on the needs and wishes of the older workers, the organisation is transmitting the message that their contribution is treasured, thus making them wish to stay in the organisation. Literature introduces mentoring as one of the HRM practices that may provide a strong identification between older workers and the organisation (Oliveira & Cabral-Cardoso,

2018a). This link results from mutual knowledge opportunities, direct know-how transfer, and the establishment of bonds between the organisation's more experienced workers—quite often also the older ones—and the others with less seniority in the organisation—and often younger. Hence, mentoring can work as an effective inclusion strategy for the older workers, as they are fundamental to passing on the organisational knowledge that assures the preservation of corporate memory.

Mentoring is defined as a relationship between a more experienced worker and a younger, less experienced worker, aiming to guide them and help their career development (Akkermans & Kubasch, 2017; Arora & Rangnekar, 2014). According to Ragins (2016), as the mentoring relationships involve a more experienced mentor and a less experienced mentee, they are traditionally considered hierarchical relationships where one person has more influence over another. However, the work experience differences do not necessarily mean that the relationship is a unidirectional learning experience. The mentoring relationships may involve mutual learning and development, and that mutuality may well be a key factor in quality relationships (Ragins, 2016). Some mentoring relationships develop informally, while others are part of a formal orientation programme within a constellation of relationships that may include formal mentors, informal mentors, supervision mentors, peer mentors, and other development relationships in and out of the workplace (Joo et al., 2012; Ragins, 2016). The mentees benefit from this relationship for the development of their careers because they receive support, coaching, protection, visibility, and challenging work tasks (Noe et al., 2002). The mentors help the mentees learn more about organisational life and prepare them for future opportunities. From a psychosocial perspective, mentees benefit by receiving acceptance, orientation, and friendship; the mentors offer them emotional support and help in the construction of confidence and feelings of self-esteem (Varghese & Finkelstein, 2020).

The effectiveness of mentoring is influenced by its origin; that is, it depends on whether it begins in a formal programme or emerges informally (Joo et al., 2012). When the origin is informal, there is no intentional selection of the relationship's

elements, whereas, in formal programmes, mentors and mentees are selected by a third element, quite often based on the function or other work-related characteristics (Allen et al., 2006). It has been suggested that mentees express higher satisfaction when involved in a formal programme with milestones and objectives clearly defined (Allen et al., 2006; Ragins, 2016). Hence, organisations can use mentoring not only to motivate and cherish the older workers (Burmeister et al., 2021) by giving them the responsibility to mentor a less experienced worker but also to fight negative stereotypes, creating a more age-inclusive environment in the organisation. Based on the above, the following research questions emerge:

Q3. What are the perceptions of the different participants (mentors, mentees, and HR managers) about mentoring?

Q4. From the perspective of mentors and mentees, what should exist in a mentoring relationship between the mentor and the mentee?

Methodology

This research followed a qualitative approach, unfolding in two sequential stages, two years apart. To begin with, the research analysed the perceived effects of the HRM practices by older manufacturing workers so that in a second moment, it could address a specific HRM practice—the mentoring process—and its effects in that same organisation. This research assumes that the set of HRM practices and their effects are context specific (Raineri, 2018), and hence it followed the single case study method (Yin, 2012). It is our contention that the descriptive strategy adopted is in the best place to allow a detailed understanding of the meanings ascribed to HRM practices by older workers of this organisation.

Research Context

The aging index in Portugal will almost double from 159 seniors per 100 youngsters in 2018 to 300 in 2080 (Instituto Nacional de Estatística, 2020). The acceleration of this index has a strong macroeconomic impact whose repercussions are also felt in the labour market, particularly in the country's most aged regions. Due to the weight

it represents in economic terms—39% of the Portuguese exports, 29% of national GDP—and in demographic terms—54% of the active population in the country (CCDRN, 2020), the ageing of the population in the Northern region of Portugal is a phenomenon worth analysing. In addition, findings from a cross-cultural meta-analysis on the attitudes toward older individuals (North & Fiske, 2015) showed stronger levels of senior derogation in non-Anglophone Europe than in North American and Anglophone regions and that within aging societies, collectivist values may backfire. Given the aging of the Portuguese population and the collectivistic nature of the Portuguese culture (Marcus & Fritzsche, 2016), the interplay between age and cultural values should be high on the aging workforces' research agenda. Thus, this research addresses a major industrial organisation in the North of Portugal. Roughly 50% of its human capital is 45 to 65 years old, and 35% of the workers are over 20 years of seniority in the organisation. In this workplace, it is also possible to notice the age segmentation of certain HRM practices, such as the early retirement provision and the hiring of older people for specific operational jobs. Acknowledging that context-related characteristics are key to designing successful HRM interventions, it was decided to analyse the perceptions of the older workers about these practices in a company challenged by the ageing of its human capital.

Study 1

The purpose of this stage was to analyse: 1) the perceptions of the older workers about the HRM practices—especially the ones that take age as a segmentation criterion—implemented in the organisation; and 2) their perceptions about the age-segmented HRM practices that have not yet been implemented in the organisation.

Participants and Procedures

Ten participants were selected: eight male participants; half of them aged 50–56 years and the other half aged 57–62 years; nine participants were machine operators, and one participant was a storeman; six participants had less than two years of seniority in the organisation, and the others had 27 to 41 years of seniority. Participant selection followed the two principles highlighted by Alvesson

and Ashcraft (2012), namely representativeness and quality. To take account of the diversity of opinions on HRM practices, suitable participants were intentionally selected. As such, participants were chosen from a database made available by the HRM department (care was taken to assure that the gender distribution of participants shadowed the distribution between men and women in the selected job categories).

The individual semi-structured interview was chosen as the research technique based on a script about HRM practices designed specifically for the older workers regarding attraction, development, orientation, and supervision, and drawn upon the literature review. The insights obtained through the pilot interview conducted to fine tune the interview script and define the estimated length of the interview suggested that older workers' views on HRM practices provide a reliable gateway to the phenomenon under study (Alvesson & Ashcraft, 2012). All due institutional authorisations were granted prior to data collection via the HRM department. Once informed consent was collected, the 10 individual interviews took place, lasting, on average, 60 minutes. Participants acknowledged their right to withdraw at any point in time and were also assured of the confidentiality of the data by restricting access and storing them securely. The interviews were audio-recorded and later transcribed. After the full transcription, we started the analysis of the content of the participants' speeches (Ritchie & Lewis, 2003), as described in Table 1.

Discussion

Most existing HRM practices are not age-oriented. However, the interviewees perceived the existence of three such practices of age management: early retirement (ER); job offers for people aged 50 or above (Recruitment and Selection, hereafter referred to as R&S); and temporary job rotation to ease the work severity (Rotation and Mobility hereafter referred to as R&M). Only ER is considered integrated in the organisational strategy. Participants mention that in this context, the older workers submitted to work severity are encouraged to retire early to make room for hiring younger workers. This option

echoes the managers' resistance to extending the work life of this population, which may transmit a stereotyped and short-sighted vision of their potential (Raineri, 2018), hence reinforcing a climate of age discrimination (North & Fiske, 2015; van Dalen et al., 2010). Despite the identification of ER as a common practice in this organisation, most interviewees do not look at it with a positive connotation *"To me early retirement means we are tired...even at this age, fifty-five."* In addition, the lack of young and qualified labour for operational jobs *"They struggle to find young people for some jobs, that is my case, I belong to that section, and in that section, they find it difficult"* seems to force the organisation to implement targeted R&S practices *"So they prefer to keep people my age here again. We know how to work"* and targeted R&M practices *"they also move us to other workstations for a while, lighter jobs, but it is temporary."* These organisational reactions seem to show the growing need to hire and retain older workers (Hennekam & Herrbach, 2015; van Dalen et al., 2010).

Providing practices focused on the

valorisation of the professional experience, such as R&S and mentoring, is an initiative that participants appreciate. The participants consider the implementation of R&S could be beneficial to both organisations and society, given the high unemployment rate among older age groups *"I am in favour because we see thousands of people who became unemployed at the age of 52, 53, etc. and they want to work, but they can't find it."* Moreover, *"...we are more productive than the younger workers! The youngest try to do it, they don't do what we do... That is why they prefer older people here. We know how to work..."* Still, some interviewees consider segmented R&S processes would be negative because they reduce the job opportunities for the youth. On the other hand, practices such as mentoring that aim at passing knowledge from the older to the younger workers are positively perceived and reason for satisfaction and increased motivation (Burmeister et al., 2021). *"If they ask me or put me in such a position, I would be proud to teach what I have learnt and teach what I have been taught, right?! So, I think it is a*

Table 1

Categories System Study 1

Categories	Subcategories
<i>Q1. What are the older workers' perceptions about the HRM practices—specially the age-oriented ones—implemented in the organisation?</i>	
Practices	Recruitment and selection; task rotation and job mobility; early retirement
Level of integration in the organisational strategy	Integrated; non-integrated
<i>Q2. What are the perceptions of the older workers about the age-oriented HRM practices that have not yet been implemented in the organisation?</i>	
Practices	Recruitment and selection; task rotation and job mobility; training and development; mentoring
Indication of qualities	Positive aspects; negative aspects

Note. The table shows the classified content grouped in two dimensions of analysis associated with research questions Q1. and Q2., and organised in codes generated by NVivo.

thing, a good thing for anyone.” The participants seem to feel confident, and they seem to own privileged tacit knowledge to play the mentor role to the least experienced workers: *“teach the youth, I would feel great! I had that confidence in me!”* These testimonies seem to reveal a process of self stereotyping from the older workers as they reflect some of the positive stereotypes mentioned in the literature regarding the older workers—e. g., wiser and more reliable than their younger counterparts (Posthuma & Campion, 2009).

As regards targeted training and development practices, more than half of the participants drew attention to the possibility of the workers feeling discriminated, diminished, or both compared to the younger workers by attending segmented training programmes *“probably they would think they were being put aside, that’s why I always say...it’s tricky.”*

To sum up, the findings confirm previous studies that highlight the contradictions and the complexity of the older workers’ perceptions about the implementation of segmented HRM practices (Hennekam & Herrbach, 2015; Oliveira & Cabral-Cardoso, 2018a). Although this age group acknowledged they have specific needs, particularly regarding the work severity, the implementation of segmented policies may not have the expected results and reinforce a climate of age discrimination within the organisations.

Study 2

The purpose of this stage was to describe the HRM practices—particularly mentoring—strategically designed for the productive inclusion of the older workers.

Participants and Procedures

In order to obtain reliable gateways to mentoring practices in the organisation (Alvesson & Ashcraft, 2012), several key informants were included in this study. Overall, nine individuals took part in this stage: three older workers/mentors (two of them female); all with more than 20 years of organisational seniority; four mentees (two of them female), aged 20 to 39 years old and organisational seniority inferior to five years, and two male HR managers.

The main technique for data collection

was the semi-structured individual interview. The procedures resembled study 1, and the interviews lasted, on average, 35 minutes (Table 2).

Discussion

According to the HR managers, the HRM practices must be adjusted to the older workers so they have the same opportunities their colleagues do and may transfer their knowledge to the organisation *“when there is that will to continue in more critical functions, to adjust those people tasks or job so the knowledge they have may be transferred.”* The same participants highlight an example of how the organisation includes older workers, namely by relying on these workers to be *“internal trainers in the organisation’s most critical operations, to be adviser....”* The alignment of the HRM practices with the needs and capabilities of these workers conveys the idea that the organisation treasures their contribution, which may, in turn, influence their permanence in the company (Armstrong-Stassen, 2008).

Aiming at capitalising on the qualities of the older workers, the organisations must try to balance different profiles so that these workers’ knowledge/experience may be transferred to others that arrived more recently at the organisation to the extent that *“this balance will certainly bring a broader amplitude of competencies, to face the challenges of the business.”*

The main perceptions about mentoring are based on the ideas of *“knowledge transfer,” “sharing of experiences,” “preparation for the future,”* and *“orientation.”* As a mentee reports, *“the help of an older person, who transmits knowledge and competencies...is a very important asset and it will certainly prepare us.”* Several mentees consider mentoring essential for the development of their jobs, adaptation, and future progression (Ragins, 2016). As one of the participants clearly expresses, *“the person being mentored ends up gaining a lot here...many skills that he probably wouldn’t get in external training.”* Most mentees also reveal they feel safer by experiencing mentoring because this process enables the acquisition of a set of important knowledge and competencies for professional development. In turn, the mentor’s opinion about mentoring is that it is absolutely necessary for

Table 2

Categories System Study 2

Codification for general characterisation purposes

Perceptions of age groups	Older worker; younger worker
HRM practices	Jobs' adjustment; Profile balancing

Codification to answer the research questions

Q3. What are the perceptions of the different participants (mentors, mentees, and HR managers) about mentoring?

Mentoring	Positive perceptions; negative perceptions; mentoring relationship
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Q4. From the perspective of mentors and mentees, what should exist in a mentoring relationship between the mentor and the mentee?

Formal mentoring programme	Objectives; operation; selection; mentoring relationship; mentors
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Note. The table shows results from the nine interviews carried out and complemented with the analysis of documents on the formal mentoring programme implemented in the organisation. Codes were generated for general characterisation purposes of the context and to answer research questions Q3. and Q4.

the organisational learning and acculturation, considering it enables the transmission of essential know-how for the company's development and evolution *"even because there's the knowledge on how the company works, its processes and if this transmission does not exist, it will be tough for newcomers...a lot will be lost, many things are written, but others are lost."* For the HR managers, mentoring is a great strategy to acknowledge and value older workers *"mentoring itself may be a way to give them room, a stage to make them feel useful. And it provides the important knowledge transfer,"* thus contributing to organisational development. According to these perceptions, mentoring emerges as an effective inclusion strategy for the older workers, given the fact that they are determinant to

transferring knowledge and organisational practices.

Following mentoring descriptions that emphasize interdependency and generativity (Ragins & Verbos, 2007), mentees stress that a mentoring relationship must be a close and transparent relationship *"the relationships are very positive, very close, first name based,"* The mentors, on the other hand, highlight the availability and the transmission of confidence (Varghese & Finkelstein, 2020) as the key factors in this type of relationships *"it is important the person feels safe to have someone to rely on in hard times, to ask questions."*

Regarding the characteristics of the participants in the formal mentoring programme¹, mentees are workers with the potential to develop in the organisation, with a college degree, or

¹ According to information obtained through document analysis, "the programme aims at supporting the transfer of knowledge and professional experiences."

workers either undergoing the integration stage in the organisation or changing into a new role with a significant degree of responsibility. Mentors are selected according to the experience acknowledged by the organisation—through the HRM Department—and by the mentee, taking on the responsibility to advise and guide the mentee's development in technical and behavioural dimensions. The plan includes a minimum of six sessions throughout 12 months, ending with a final assessment report. Hence, the programme follows the prescription from Allen et al. (2006) to increase its effectiveness: prior identification of the programme's goals; clarification of the eligibility criteria, considering the selection may be carried out by a third party; enlightenment about each role, and establishment of mutual expectations. According to the protagonists, the programme's purposes are fully achieved *"in my opinion it is one of the best programmes we have here at the company,...even the mentors also learn from the mentees."* Simultaneously, the mentors feel they are recognised and cherished given their role in this process and that it contributes to a better image of the older worker in this organisation. Indeed, the mentors say the accumulation of experiences is looked upon with admiration and recognition, specially by the younger workers who arrived recently at the organisation *"...there is a certain respect for people who have, more than age, a given path in this company."* Notwithstanding being seen in an overall positive light, all the mentors disclosed one drawback that might hamper the effectiveness of the mentoring program in the long run. According to them, it is extremely difficult to reconcile mentoring with day-to-day work. *"Well, there is always a difficulty that is time, we are always assessing how can we accommodate that time we need to be with the mentee and follow our usual work schedule. Sometimes that is the problem...."* To sum up, mentoring as it is structured in this organisation seems to capitalise the age diversity to achieve better organisational results (Raineri, 2018).

General Discussion

This two-stage study was carried out in an industrial company in Portugal two years

apart. It addressed mainly the perceptions of the older workers about the HRM practices designed specifically for their age group. By placing the targets of those practices in the spotlight, we aimed to add insights to the prevalent research stream focusing on the managers' perspective (Kooij et al., 2014). The first stage was aimed at understanding how segmented HRM practices (in use in the organisation or not) are perceived, particularly trying to understand what type of message does the organisation communicate with their implementation and, finally, realising whether their recipients appreciate them or, on the contrary, think they have a discriminatory dimension. A few segmented HRM practices are being adopted in the context under analysis—ER, R&S, and R&M—raising contradictory reactions. Some workers mention that the organisation provides work opportunities to older workers because it values their professional experience; others refer to the organization encouraging the older workers to retire to hire younger workers. In fact, both seem to have support because the segmentation of existing R&S and R&M practices is a consequence of the difficulty in finding young candidates for some operational positions. At the same time, R&M interventions aiming at reducing the work severity seem to be positively perceived by most workers, as they point out this population has specific needs acknowledged by the older workers. According to the signalling theory (Connelly et al., 2011) and the social exchange theory (Blau, 1964), this practice has the potential to induce the older workers to postpone their retirement and remain active (Kooij et al., 2008) because it answers real needs experienced by the older workers. The implementation of segmented training and development processes, on the other hand, may not carry as much inclusion potential for this age group because the risk of creating stigma is probably higher than the optimisation of competencies it intends to promote. In line with the social identity theory (Tajfel & Turner, 1979), providing specific training for the older workers conveys the idea that, instead of assessing each worker individually, the organisation considers these workers as mere elements of a social category that, by the way, is the target of several negative stereotypes (Posthuma & Campion, 2009). Finally, the provision of mentoring processes seems to be a

promising path to be explored in the organisation, given the fact that the workers consider this type of work relationship as a great way to dismiss unfounded stereotypes about their age group and, at the same time, enable the development of those involved, with obvious benefits for the organisation (Kooij et al., 2008; Ragins, 2016). Furthermore, workplace arrangements like mentoring may enable societies, in particular collectivistic societies like the Portuguese one (Marcus & Fritzsche, 2016), to reap the benefits from positive intergenerational contact at work (Burmeister et al., 2021). The second study explored the possibility of mentoring becoming an effective strategy for the productive inclusion of these workers. Overall, the mentoring relationship shows very positive results, not only for the mentors—older workers—but also for the mentees (Burmeister et al., 2021). As a matter of fact, the contributions of the older workers are acknowledged and valued by the mentees and the HR managers, which may benefit the reframing of the negative image usually associated with the older workers (Oliveira & Cabral-Cardoso, 2018a). All the mentors reported feelings of well-being, pride, and increased confidence because the organisation has given them the opportunity to teach and guide younger colleagues (Varghese & Finkelstein, 2020). It seems consensual that the investment in mentoring programmes, especially formal programmes such as the one addressed here, pays off (Kooij et al., 2014). By creating perceptions of organisational support in the older workers, this HRM practice reinforces the sense of identification with the organisation, hence cultivating in these workers the wish to remain actively involved in their professional growth and the organisational development.

Theoretical Contributions

The first stage of this research corroborates recent concerns towards the effects of some age-oriented HRM practices, for instance, ER and R&M (Kooij et al., 2008; Oliveira & Cabral-Cardoso, 2018b). Two intertwined explanations may help understand such concerns. As suggested by the social identity theory (Tajfel & Turner, 1979), individuals seek to keep a positive social identity, so they relate to groups that enable their self-improvement and increase their self-esteem. HRM

practices directed exclusively to older workers may send the message that this group is less capable within the organisation. The older workers seem to interpret these practices as a sign of their less worth in the eyes of the organisation, thus validating the negative social stereotypes about this age group. This connotation is even more serious when some of the workers do refer that, for instance, the option for ER is fully integrated in the organisational strategy, which translates an institutionalisation of the stereotypes about this group. In turn, according to the signalling theory (Connelly et al., 2011), this process of sensemaking about the intentions the organisation has when it promotes these HRM practices seems to reinforce the negative social identity of older workers, making room for an unwanted age discrimination climate in the labour context (North & Fiske, 2015; van Dalen et al., 2010).

On the other hand, the older workers attach a positive meaning to the provision of practices centred on the valorisation of the professional experience (e.g., R&S and mentoring). Because of this positive interpretation, older workers experience higher levels of work satisfaction and confidence, as well as lower levels of turnover intentions. These desirable consequences resonate with the principles of the social identity theory (Tajfel & Turner, 1979) and the social exchange theory (Blau, 1964). By implementing this type of practice, the organisations show the older workers a sign of recognition for their contribution (Connelly et al., 2011), strengthening the positive image of this group. In line with the idea of social exchange (Blau, 1964), when the older workers realise their age group is valued, they try harder to compensate with their effort and quality of service the care and value the organisation dedicates them. Furthermore, the continuous, close, and quality contact between workers from different age groups that is visible in the mentoring relationship may contribute to hampering some of the negative stereotypes about older workers (Burmeister et al., 2021; North & Fiske, 2015).

Implications for Practice

The outcomes of study 1 suggest the HR managers shall redouble the attention paid to the

implementation of age-oriented HRM practices. Each worker shall be assessed in their individuality and not be short-sighted and looked at as just a representative from an age group (McDaniel et al., 2012); likewise, each HRM practice per se must be analysed alone and evaluated by its exclusive effects. Although it is true that certain practices like mentoring deserve the approval of their recipients, echoing recent empirical findings (Burmeister et al., 2021), others awaken feelings of anxiety and mistrust that may even result in lower levels of work engagement and organisational identification (Oliveira & Cabral-Cardoso, 2018b). It is up to the managers to check on a regular basis on the perceptions triggered by the practices they plan to implement. At the same time, surveillance over the managers' age-related beliefs must be guaranteed because such conception may seriously compromise the decision-making quality under the HRM interventions' scope. Considering the perceived value of the HRM practices in the eyes of the workers is as related to the practice of technical consistency as to the meaning it has in the mind of those workers, the organisations cannot take the chance of sending messages perceived as discriminatory or paternalistic. To be careless at this level not only enhances noninclusive climates but also poses obstacles to positive social exchanges in the workplace, hindering, for instance, organisational citizenship behaviours.

Study 2 made it clear that mentoring is not one of those practices. In an organisation whose business relies on the know-how that can only be gained after the accumulation of experiences in the organisation itself, mentoring is considered essential to assure a smooth handover; at the same time, it allows the older and more experienced workers to train and develop the new colleagues. Moreover, this process sends the mentors the message that they are recognised in the organisation, creating the desire to stay longer. Consequently, the managers shall promote formal and structured mentoring programmes because they offer higher effectiveness than disconnected informal mentoring or short-term development interactions carried out at a specific moment in time (Joo et al., 2012; Ragins & Verbos, 2007). To guarantee the sustained effectiveness of mentoring, it is recommended that the HR managers supervise the frequency of the mentoring meetings,

collect intermediate feedback from both players and watch over the preparation of final assessment reports about the process and the follow-up. In addition, the managers are suggested to look at the mentoring relationship as an interdependent and generative development relationship that encourages mutual growth, learning, and professional development (Burmeister et al., 2021; Ragins, 2016; Ragins & Verbos, 2007). Only then can the organisations benefit from all the advantages that come with such dyadic relationships, namely reverse mentoring. With the advent of industry 4.0, all the ideal conditions are set to qualify the older workers in new technologies, while at the same time, the relevant competencies for the career of the younger workers are being developed (Kaše et al., 2019).

Limitations and Avenues for Further Research

Any scientific work has limitations. To begin with, this study was carried out in an organisation that not only treasures the older worker and the knowledge transfer only they can perform but also depends upon that experience and handover, and for that reason, the findings may be debatable. Then, the small number of participants—though mitigated by the fact that there were two data collection stages—limits the access to the whole story and prevents the perceptions from being extended to the entire organisation. This justifies one of the suggestions for further research that would be identical research in its purposes but addressing the organisations' white-collar workers. Further research may also explore the older workers' attitudinal reactions to HRM practices using frameworks that analyse the cognitive, affective, and behavioural dimensions using, for example, the experience sample method (ESM) or diaries. Any of these approaches would also share the merit of increasing the research's ecological validity by decreasing the recall bias. Finally, it would be relevant to have exploratory qualitative studies focused on the effects of reverse mentoring (Kaše et al., 2019).

Conclusion

Overall, this research revealed the importance of HRM practices to older workers'

successful aging. Practices like formal mentoring programmes seem to signal to older workers that the organisation is concerned with their careers and that older workers' contribution is a highly valued part of the overall organisational development effort. With longer working lives becoming the norm, our findings make clear to organisations some dos and don'ts regarding HRM practices effects on the older workers' workplace experience.



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