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# Graying and *Still* Growing

Removing Barriers to Older Worker  
Utilization and Boosting the Economy



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# **GRAYING AND STILL GROWING**

**Removing Barriers to Older Worker  
Utilization and Boosting the Economy**

**Summer 2004**



## FOREWORD

The aging of the federal workforce poses significant challenges that human capital managers have barely begun to address. The *Graying and Still Growing* forum on July 10, 2003 was designed to 1) draw attention to the important issues raised by the looming labor shortfall when baby boomers begin to retire and 2) advance the discussion of best practices and potential solutions. It was hosted by the National Academy of Public Administration's Human Resources Management (HRM) Consortium (whose FY2004 work plan specifically addresses older worker utilization as one of its key elements) and the National Older Worker Career Center (NOWCC), a non-profit organization dedicated to expanding employment and training opportunities for America's older workers, and a member of the Consortium.

The **National Academy of Public Administration** is an independent non-profit, non-partisan corporation chartered by Congress. Founded in 1967, it provides trusted advice to leaders on issues of governance and public management. The Academy works closely with all three branches of government at the federal, state, and local levels; with philanthropic and non-governmental organizations; and with foreign and international institutions that request advice or assistance.

The forum's objectives were to:

1. Present a portrait of the American workforce—what it looks like, what data project about the future and what the implications of those projections are.
2. Discuss how current public policy, prevailing practices and societal attitudes impede longer work lives.
3. Explore opportunities for private/public sector cooperation in addressing the aging workforce.

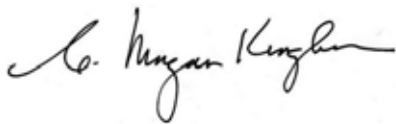
The **National Older Worker Career Center**, a non-profit organization based in Arlington, Virginia, expands employment and training opportunities for America's fast-growing population of workers age 40 and over. It is a premier sponsor of the Senior Environmental Employment (SEE) program which places older workers in positions within the Environmental Protection Agency (EPA) through an EPA grant.

4. Identify short-term human capital management strategies and actions to mitigate the effects of the "brain drain," and consider mid- and long-term approaches to keeping a committed workforce in place.
5. Build a foundation for future discussions about legal or regulatory changes necessary to remove current impediments.

Jule Sugarman, an Academy Fellow and former Deputy Director of the U.S. Office of Personnel Management, moderated the July 2003 forum at the Academy's offices in Washington, DC.

Forum panelists included such Academy Fellows as U.S. Comptroller General David Walker and former Secretary of the Department of Transportation Alan Boyd, as well as other outside experts. Their biographies are included in the Appendix.

We would like to thank the forum's panelists, whose knowledge and experiences contributed greatly to the quality of this report. It is our hope that this report will increase federal managers' understanding of the critical issues surrounding effective utilization of older workers.



C. Morgan Kinghorn  
President  
National Academy of  
Public Administration



Larry E. Anderson  
President  
National Older Worker  
Career Center

## INTRODUCTION

### Exam for Government Leaders

In the 21<sup>st</sup> century, the federal government faces a major challenge that is getting very little recognition. This challenge demands constant attention and unwavering commitment from government leaders, innovative policy solutions to address quickly evolving challenges, and effective management and implementation strategies. However, few of these elements are in place to even begin addressing the issue. What is this unrecognized challenge?

- a. Homeland security
- b. The war on terrorism
- c. Coping with fiscal crisis
- d. Labor shortages when baby boomers begin to retire

While the first three challenges are indeed important ones, the federal government is well aware of them and has begun taking steps to meet them. Yet one of the most daunting challenges the federal government is facing is largely unrecognized – the rapidly aging federal workforce. The aging workforce will have a profound effect on the federal civil service and the entire economy when older workers begin to retire in large numbers without sufficient younger workers to replace them.

**The aging workforce will have a profound effect on the federal civil service and the entire economy when older workers begin to retire in large numbers without sufficient younger workers to replace them.**

Unfortunately, the human capital strategies of many government agencies are dangerously short-sighted in light of this approaching crisis. Government leaders must

quickly identify and grasp this issue so that proper discussion and dialogue can occur before the retirement wave hits.

The labor shortage America is facing may be the worst in the nation's economic history. Yet it is occurring at a time when U.S. workers are living longer, healthier lives and some older workers would like to extend their careers beyond normal retirement age. According to a report from the Urban Institute, healthy retirees with 10-30 years of life expectancy are fast becoming the largest untapped source of potential labor in the economy.<sup>1</sup>

To quote one forum panelist: "Meeting the policy challenges of extending the employment lives of older workers can lead to budgetary, economic and other benefits for this nation." Utilizing the nation's seasoned workers effectively will involve changes not only to the present stereotypes of older workers, but to public policy and business practices as well.

Many legal and institutional impediments to the continued utilization of older workers were actually put in place when the country needed to accommodate the large numbers of baby boomers entering the labor force. In the 21<sup>st</sup> century, however, our national challenge is to allow older workers to continue their labor force participation through programs and policies like flexible work schedules and phased retirements or by removing disincentives to continued employment in pension systems. None of these types of changes can be undertaken in a vacuum. Rather, the solutions to retaining older workers are unquestionably linked to a host of public policy issues such as Social Security, Medicare and a variety of economic issues.

It is essential that government leaders begin to prepare for the imminent labor crisis they will soon be facing and to begin developing strategies to retain older workers. To assist in that effort, this report examines some relevant data, details barriers to effectively using older workers, highlights some current experiences and success stories and offers key action steps for improving older worker utilization.

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<sup>1</sup> Penner, Rudolph G., Pamela Perun, and Eugene Steuerle. "Letting Older Workers Work." Urban Institute Brief Series, No. 16, July 2003.

## EXAMINING THE DATA

The reality of a rapidly aging federal workforce confronts human capital managers across government daily. Already several government agencies, including the Department of Defense, Internal Revenue Service, NASA, Department of Homeland Security, Social Security Administration and Capitol Police, have had to seek approval for special programs to retain needed older workers. Other agencies will soon discover that long-term demographic trends may adversely affect the composition and productivity of their workforce unless steps are taken to avoid a labor shortfall.

Demographic data clearly depict the need to retain older workers:

- The labor shortfall will be 7.5% in 2010, representing roughly 10.2 million full-time workers, according to the first quarter 2002 *Benefits Quarterly*.
- The Bureau of Labor Statistics projects the following employment outlook between 2002 and 2012:

	Number of workers		Percent Change
	2002	2012	
Age 25 to 54	101,720,000	106,866,000	5.1%
Age 55 and older	20,777,000	31,026,000	49.3%

- Labor force growth will slow from 1.1% per year in the 1990s to 0.36% per year from 2010-2020.<sup>2</sup>
- The modal age of supervisors and managers has increased from 44 in 1991 to 54 in 2001.

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<sup>2</sup> Penner, Rudolph G., Pamela Perun, and Eugene Steuerle. "Letting Older Workers Work." Urban Institute Brief Series, No. 16, July 2003.



These statistics demonstrate that our country needs to retain and utilize workers ages 55 and above in order to sustain a viable work force. Older workers—who now represent 13% of the labor force—will represent 20% of the labor force by 2020, and remain at that level for decades to come.

America's need for older workers comes at a very auspicious time in our country's growth. Over the last few decades, the economy has been transformed from an industrial-based economy to a knowledge-based one, making more workers physically capable of performing their job duties until later in life. Improvements in healthcare and medicine are allowing workers to live longer and healthier lives. Further, life expectancy in the United States increased by 28 years in the past century—from 49.2 years at the beginning of the 20<sup>th</sup> century<sup>3</sup> to 77.2 years in 2001.<sup>4</sup>

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<sup>3</sup> *National Vital Statistics Reports*, Vol. 51, No. 3, December 19, 2002. National Center for Health Statistics. Accessed at [http://www.cdc.gov/nchs/fastats/pdf/nvsr51\\_03t11.pdf](http://www.cdc.gov/nchs/fastats/pdf/nvsr51_03t11.pdf) on May 14, 2004.

<sup>4</sup> *Health, United States, 2003*. National Center for Health Statistics. Accessed at <http://www.cdc.gov/nchs/data/hus/tables/2003/03hus026.pdf> on May 14, 2004.

## **BARRIERS TO EFFECTIVE OLDER WORKER UTILIZATION**

To address the challenges of older worker utilization, government and private sector leaders must fully understand the range of institutional, societal and other barriers they face. In some cases, the barriers apply equally in the public and private sectors, while in other instances they are more pronounced in government. Some of the major barriers are described below.

- **Wide-reaching stereotypes.** Managers and co-workers sometimes think that seasoned workers know the system, know how much paper to shuffle, and know how much time to spend at the water cooler. Older workers also have to battle the stereotype that they are less capable, or incapable, of innovation and creativity. In government, new political appointees may see older workers as roadblocks to change and assume that they have little to offer the workplace.
- **High costs of health insurance.** Employers may assume that, with health insurance costs skyrocketing across the board, providing health insurance to older workers and their families will be extremely expensive. Some data show that this may not be the case or that insuring older workers may be no more expensive than some other cohorts, such as insuring female workers of child-bearing age. Federal employers are also aware that government agencies, not Medicare, are the primary health insurance payers for employees over 65 years of age. Expensive health care—or the perception that older workers are considerably more costly to insure than other groups—could represent imposing barriers.
- **Outdated pension benefit plans that provide an incentive to retire.** Some pension benefit plans were designed decades ago when it was important to encourage people to leave the workforce to make room for baby boomers when they were first entering the workforce. Under defined benefit plans,<sup>5</sup> there often comes a time when choosing to

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<sup>5</sup> Defined benefit plans are usually calculated using a formula, such as the number of years of service multiplied by a certain percentage of a worker's salary in their years of highest pay (e.g., the highest three or five years).

work one year longer actually can lead to a decrease in pension benefits. Defined benefit plans such as these still exist, especially in the government.

- **Apathy of personnel managers to use existing regulations.** Some government agencies already have regulations and policies allowing more effective utilization of older workers, but managers do not understand or take advantage of existing authorities. The complexity of regulations and policies is often a factor.
- **Legal impediments to phased retirement plans.** Employers offering benefit programs must comply with rules contained in three complex statutes—the tax code, the Employee Retirement Income Security Act of 1974 (ERISA) and the Age Discrimination in Employment Act (ADEA). Each has features that may make designing phased retirement programs unappealing, according to an Urban Institute report.<sup>6</sup>
- **Lack of established policy regarding retirement transition programs.** There is no established policy in the federal government regarding programs to allow for transition into retirement. Various agencies formally and informally make arrangements with individual employees wishing to reduce workloads or responsibilities, but no established best practices or programs have been implemented as a standard policy or practice for those who are eligible for retirement.
- **Less technologically advanced older workers.** Seasoned workers may lack up-to-date computer skills depending on their job responsibilities and training opportunities. There is some indication that education—not age—is the key factor in whether or not employees have adequate technological skills. One study found that, as education increases, there are fewer differences in technological skills between older and younger individuals.<sup>7</sup> In addition, the study

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<sup>6</sup> Penner, Rudolph G., Pamela Perun, and Eugene Steuerle. “Letting Older Workers Work.” Urban Institute Brief Series, No. 16, July 2003.

<sup>7</sup> Prisuta, Robert H., Sutterlin, Rebecca. “Seniors in Cyberspace: Personal Computer Use and Ownership By Older Persons.” Published by AARP, April 1996.

found that as the workforce continues to age, more and more older workers are acquiring the skills needed to meet twenty-first century needs.

- **The affluence of American society.** One important societal factor that dramatically influences workers' retirement decisions is the affluence of American society. Workers who have significant savings and retirement benefits are more likely to retire than to work. When workers are financially able to quit working, the proportion of older workers remaining in the labor force will be lower than if continued employment is a financial necessity.

## Older Worker Survey

The demographic realities of impending baby boomer retirements demand that organizations make recruiting, rewarding, and retaining older workers a top management priority. A June 2003 survey jointly conducted by the Society for Human Resource Management (SHRM), NOWCC and the Committee for Economic Development (CED) explored many managerial facets of aging workforce issues. The survey randomly sampled human resource professionals selected from SHRM's 170,000 members. Key findings and observations from the survey are included below.

- Among surveyed organizations, 32 percent said they are doing nothing to prepare their organizations for the baby boomer retirement wave, 59 percent do not actively recruit older workers, and almost two-thirds do nothing specific to retain older workers.
- According to survey respondents, older workers' unique value is derived from their years of experience, their willingness to work part-time or seasonally (which can assist organizations in achieving short-term goals), and their ability to mentor workers with less experience.
- The traditional age of retirement is often considered to be 65, but many respondents indicated that employees are considered "older workers" at as early an age as 50. This stereotyping contributes to difficulties in retaining and effectively utilizing older workers.
- Popular strategies used to prepare for the retirement wave include increased training (36 percent), succession plans/replacement charts (29 percent), flexible scheduling (21 percent), and creating bridge employment (20 percent). Meanwhile, organizations rarely designed automatic processes (5 percent), created benefits (8 percent), or implemented phased/gradual retirement programs (10

- 72 percent of respondents stated that they felt that older workers return to work for their own enjoyment, with money being the second leading incentive. Older workers also highly value the social interaction involved with returning to work, according to respondents.
- The good news is that government may be ahead of the curve in terms of identifying the need to retain older workers, even if the effectiveness of its older worker policies remains in question. Among government HR professionals, 43 percent indicated that their agency had developed processes to capture institutional memory, while 71 percent of agencies reportedly had increased training to prepare for a potential workforce shortage when the retirement boom arrives. These figures are significantly above levels for all other industries surveyed, demonstrating the increased attention older worker issues are receiving in government. Despite these encouraging statistics, only 6 percent of government respondents think that the problem is being effectively addressed. Obviously, progress has been made, but significant work remains.

Source: *Older Workers Survey*, Society for Human Resource Management, National Older Worker Career Center, Committee for Economic Development, June 2003.

## **SUCCESS STORIES**

Forum panelists highlighted a variety of successful organizational efforts and models for designing and implementing policies to utilize older workers. These experiences can provide ideas to spark creative new approaches to increasing older workers' labor force participation.

### **The Senior Environmental Employment Program**

The Senior Environmental Employment (SEE) Program in the Environmental Protection Agency (EPA) represents a positive model for integrating seasoned employees into the workforce that benefits both workers and the government (see P.L. 98-313). The SEE program provides more than 1,800 technicians, clerical/administrative staff and professionals who are 55 and over to EPA and six other federal entities. SEE enrollees who work in federal, state and local government offices have a wide range of educational and economic backgrounds. The program is funded by the EPA and the other participating agencies, and administered by selected non-profit organizations through cooperative agreements.

A SEE enrollee's position can be full-time or part-time and is renewable at the government's option after one year. Enrollees work in a support role, meaning that they may not supervise or displace government workers, obligate the government, or authorize policy or action. They currently represent slightly more than 10 percent of EPA's overall workforce. Other federal agencies can implement their own program through SEE by initiating an Interagency Agreement with EPA.

### **U.S. Government Accountability Office**

GAO is on the cutting-edge of creatively integrating seasoned workers into its workforce. GAO offers the option of phased retirement—moving from full-time to part-time status while still allowing workers access to their

pensions—to some of its employees. GAO has implemented its phased retirement program without seeking any special legal authorities.

### **International Examples**

The aging of the workforce is more pronounced in some countries than it is in the United States. Countries like the United Kingdom, Japan and Sweden have been exploring options for effective use of older workers. A GAO study found that some countries have reformed their national pension systems, employer-provided pension systems, disability insurance or labor market policies in the quest to effectively use older workers. The United States can learn important lessons from these and other countries.

### **Military Model**

The U.S. military has been experimenting with creative ways to utilize the skills of senior-level retirees. For example, some military retirees work at organizations such as the Logistics Management Institute, a non-profit organization that works extensively with defense agencies. Indefinite deliverable/indefinite quantity (IDIQ) contracts and other procurement and acquisition methods provide valuable means to take advantage of the specific talents of those who have left the military.

### **Senior Tax Employees**

Two-year “at will” employment is used at the Internal Revenue Service to phase senior tax employees into retirement, typically by having them work two or three days per week. This type of program requires obtaining permission from the U.S. Office of Personnel Management (OPM), but approval can be applied to large numbers of workers. Retirees can also be brought back on board with no change to their annuity to assist the government during tax season. This is a very effective practice in areas where it is difficult to find younger employees.



## **Academic Models**

Under the “emeritus” model used by colleges and universities, institutions provide a former senior-level employee with workspace and a job title and utilize them on an as-needed basis. When the organization has a pressing need and the emeritus individual is available, this system mutually benefits the organization and the worker. This model keeps individuals engaged in work that fits their interests and uses their talents, but does not require a large investment of their time and energy. Another academic model can be seen in the Higher Education Amendments of 1998, which protect universities against discrimination suits when they offer carefully structured, part-time arrangements to their professors.

## **State and Local Government Flexibilities**

State and local governments have developed an innovative way to eliminate what can be an impediment to continued utilization of older worker—the loss of pension benefits. Through the Deferred Retirement Option plan, older workers who continue in the workforce on either a full-time or part-time basis can elect to have what would have been the amount of their pensions deposited in a defined contribution account. Employees can use the money they accumulate in this account to purchase an annuity.

## **ACTION STEPS FOR THE FUTURE**

The demographic realities of the aging federal workforce are real, and the challenge to effectively utilize older workers in the federal government is daunting. However, this is a dilemma that cannot be ignored. Instead, it needs to be managed with an eye toward long-term improvement and innovative transformation.

**... effectively utilizing older workers must be a major part of meeting the future workforce challenge.**

A variety of factors may affect the degree to which the retirement wave affects the national workforce, including increased productivity, technological advances,

immigration, stepped up recruiting and outsourcing. The fact remains, however, that effectively utilizing older workers must be a major part of meeting the future workforce challenge.

Possible actions to mitigate the impacts of the labor shortfall—some that are broad and some that are very specific—are outlined in the remainder of this report. While various panelists did not agree on all of these recommendations, these ideas provide a framework to advance the dialogue about how to effectively integrate older workers' talent into the workforce.

### **Recommendations for All Employers**

- **Organizations should foster environments that are conducive to older workers staying until later in their lives.** Doing so means that workers must be afforded opportunities to contribute to organizations through jobs that they enjoy. One specific example of how to accomplish this objective may be to change the seasoned workers' jobs in some interesting way—such as including them in a mentoring program for younger workers.
- **Promote phased retirement as a viable option for employers and workers.** Phased retirement offers a balance between work and leisure that many older employees find desirable. Employees often

benefit from the option to shift gradually from a 40-60 hour a week job to total disengagement.

- **Provide training opportunities throughout employees' work-lives.** Continuous skill development and maintenance is increasingly important as technological advances render some areas of worker knowledge obsolete. This is a critical issue for workers of all ages. Ensuring equal access to training for older workers is an additional concern.
- **Consider the re-organization of the work itself as part of re-engineering efforts.** Initiatives to improve organizational efficiency and effectiveness often involve changes in workflow and work distribution. Accommodating the changing demographics of the workforce should be a factor in the workflow redesign efforts.
- **Implement assistive technologies that enhance productivity.** A research study commissioned by Microsoft Corporation and conducted by Forrester Research, Inc. in 2003 found that 60 percent of all workers are likely or very likely to benefit from the use of accessible technology.<sup>8</sup>
- **Move toward flexible benefits programs.** Older workers bring a broad range of personal situations and benefit needs. Some are raising their grandchildren; some only want to work two days a week but need health benefits; some need the additional income; some want only the opportunity to remain professionally engaged. Flexible benefit plans are needed to accommodate the range of older workers' needs.
- **Assess the Social Security and Medicare as first-payer issues.** All efforts to extend work-life will impact and be affected by these entitlement programs. It may be necessary to adjust these programs

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<sup>8</sup> "The Wide Range of Abilities and Its Impact on Computer Technology," A research study commissioned by Microsoft Corporation, and conducted by Forrester Research, Inc. in 2003. Accessible at <http://www.microsoft.com/enable/research/workingage.aspx>.

to encourage extension of work-life from both the employer and older worker perspectives.

### **Specific Recommendations for the Federal Government**

- **Expand the Senior Environmental Employee (SEE) Program—or something similar to it—throughout the entire government.** Thousands of workers have been employed through the highly successful SEE Program. These workers can mentor, provide experience and augment the work of permanent agency staff. The extent to which EPA calls upon SEE enrollees is a testament to the program's value and the talent of seasoned workers.
- **Pursue rigorous succession planning programs such as those used in the private sector, where two or three workers often backstop top leaders.** Mentoring programs and teaming relationships that connect older workers with other employees are ways to facilitate an integrated succession planning program so that everyone from younger workers to seasoned workers feels fully engaged in the organization and its mission.
- **Recruit top-performing seasoned workers from the private sector.** Since September 11, many Americans want to find ways to express their patriotism. Agencies should capitalize on this commitment by providing opportunities for private sector workers to enter public service late in their careers.
- **Allow retirees to re-enter the labor force without sacrificing their retirement benefits.** Relatively simple changes to rules governing how much workers can earn without losing their pensions might make a substantial difference in eliminating financial disincentives to work.
- **Undertake thorough research on barriers to older worker utilization.** For example, is it truly more expensive to hire an older worker, especially when considering the tremendous value-added they often bring to an organization?

- **Engage Chief Human Capital Officers (CHCOs) and Congress in this critical issue.** Once older worker utilization programs are authorized or underway, they should be presented to CHCOs and Congress so that the programs gain government-wide visibility.

## APPENDIX

### Moderator and Panelist Biographies Biographies as of July 10, 2003

**Mr. Jule M. Sugarman (Moderator)**

Vice Chairman, Boys and Girls Clubs of Southern Maryland. Former Executive Director, Special Olympics International; Secretary, Department of Social and Health Services, State of Washington; Deputy Director, U.S. Office of Personnel Management; Chief Administrative Officer, City of Atlanta, Georgia; Administrator, New York City Human Resources Administration; Director, Children's Bureau, U.S. Department of Health, Education, and Welfare. Senior Fellow, National Academy of Public Administration.

**Mr. Alan Boyd**

Former Chairman, Warner, Blue & Mahan, Inc.; Vice Chairman and President, Airbus Industries of North America, Inc.; President, AMTRAK; Secretary, U.S. Department of Transportation; President, Illinois Central Gulf Railroad. Senior Fellow, National Academy of Public Administration.

**Ms. Ginger Groeber**

Ms. Groeber is the Deputy Under Secretary of Defense for Civilian Personnel Policy. She is responsible for the civilian personnel program for the Department of Defense. The civilian personnel program encompasses over 800,000 civilian employees appropriated fund, non-appropriated fund, and foreign national; and an annual cost of over \$47.5B. She is charged with the development and implementation of a Department-wide strategic plan and setting the strategic direction for the Department's civilian personnel programs. Within that strategic vision, she ensures that legislative proposals are drafted and supported as well as development and implementation of policy and regulatory guidance.

**Mr. William E. Herron**

Bill Herron is a retired partner from Arthur Andersen and is a licensed CPA in Pennsylvania and the District of Columbia. Mr. Herron spent twenty years in the Accounting and Audit Practice of Andersen where he was Partner in Charge of their Financial Services and Real Estate Industry in the Philadelphia Office. In 1995, he transferred to Washington, D.C. to start up a new practice in consulting for the U.S. Federal Government. He served as Managing Partner of the practice from 1997 to 2001 where he grew the business from 6 people to over 250 people and generated over \$40 million in revenues in 2001. Since 2001, Mr. Herron has been functioning as an independent consultant working for the Private Sector Council in Washington, D.C. In 2003, Mr. Herron joined Knightsbridge Technology LLP as a senior partner. He has also had a distinguished military career, and retired as a Rear Admiral-Upper Half.

**Ms. Rosslyn S. Kleeman**

Distinguished Executive-in-Residence, Department of Public Administration, School of Business and Public Management, George Washington University. Former Staff, Office of Presidential Personnel, The White House; Director, Federal Workforce Future Issues and Senior Associate Director, General Government Division, U.S. General Accounting Office; Project Director, U.S. Office of Management and Budget; President's Advisory Council on Management Improvement; Acting Director and Deputy Director, Women's Action Program, U.S. Department of Health, Education, and Welfare. Senior Fellow, National Academy of Public Administration.

**Dr. Van Doorn Ooms**

Van Doorn Ooms is a Senior Fellow at the Committee for Economic Development and formerly was CED's Senior Vice President and Director of Research. He was Executive Director for Policy and Chief Economist of the Committee on the Budget, U.S. House of Representatives in 1989-1991 and was the Budget Committee's Chief Economist during 1981-1988. Previously he was Assistant Director for Economic Policy (Chief Economist) at the Office of Management and Budget (1978-1981) and Chief Economist of the

Committee on the Budget, U.S. Senate (1977-1978). Dr. Ooms's primary specialties are in macroeconomics and fiscal policy, with special emphasis on the political economy of the U.S. Federal budget.

**Dr. Rudolph G. Penner**

Rudolph G. Penner is a Senior Fellow at the Urban Institute and holds the Arjay and Frances Miller chair in public policy. Previously, he was a Managing Director of the Barents Group, a KPMG Company. He was Director of the Congressional Budget Office from 1983 to 1987. From 1977 to 1983, he was a Resident Scholar at the American Enterprise Institute. Previous posts in government include Assistant Director for Economic Policy at the Office of Management and Budget, Deputy Assistant Secretary for Economic Affairs at the Department of Housing and Urban Development, and Senior Staff Economist at the Council of Economic Advisors. Before 1975, Dr. Penner was a professor of economics at the University of Rochester.

**Dr. Joel M. Reaser**

Dr. Reaser has committed his professional life to organizations addressing the issues of older people. While at AARP, he directed research programs to assess the needs of older Americans and their families and the use of technology for serving them. During that time, he also served as a Visiting and Adjunct Professor in the School of Engineering and Applied Sciences at the George Washington University. Subsequent to his retirement from AARP in 2001, he joined the staff of the National Older Worker Career Center (NOWCC) where he had served as a board member since its inception in 1997. He currently serves as Sr. Vice President, Business Operations and Strategies at NOWCC.

**Dr. Philip Rutledge**

Professor Emeritus, School of Public and Environmental Affairs, and former Special Assistant to the President and Professor, Indiana University. Former Director, Department of Human Resources, Government of the District of Columbia; Professor of Public



Administration, Howard University; Director of Policy Analysis, National League of Cities and U.S. Conference of Mayors; Deputy Administrator, Social and Rehabilitation Service, U.S. Department of Health, Education and Welfare; Deputy Manpower Administrator, U.S. Department of Labor. Senior Fellow, National Academy of Public Administration.

**Hon. David Walker**

Comptroller General of the United States. Former Partner and Global Managing Director, Arthur Andersen, LLP; Public Trustee, U.S. Social Security and Medicare Trust Funds; Assistant Secretary of Labor for Pensions and Welfare Benefits Programs, U.S. Department of Labor; Acting Executive Director, Pension Benefit Guaranty Corporation. Fellow, National Academy of Public Administration.







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