

**Generation X's Influence on the Workplace
Findings Report**

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Overview

Born between 1965 and 1979, "GenerationX" is a substantial part of the labor market with some reaching positions of power. When compared with the "Baby Boomer" generation, born between 1946 and 1964, this new generation has different work relationships that challenge existing management theories.

Corporations face a management crisis and may lose their competitive advantage if they fail to understand and take into account the realities of Generation X work values. It is important to understand Generation X work values and characteristics in order to develop new management techniques that are flexible and inclusive of the Generation X work force.

Research Objective

The purpose of the Generation X study is to test the theory of generation work values that compares work value similarities and differences for GenXers and Baby Boomers in small, entrepreneurial enterprise software technology companies. The research question is: What are the work values of GenX and Baby Boomers? The research question is further defined into five investigative questions. The study is descriptive cross-sectional survey research employing experience interviews with sample company CEOs and a web-based Rokeach Value Survey with a random sample of employees. The Rokeach Value Survey was selected to measure values because it has been proven to be a viable instrument for work value assessment.

Methodology

The population is small software technology firms that sell packaged applications to enterprises. The sample size is 10 companies and 100 randomly sampled employees. A total of nine companies participated in the study and provided a total of 90 sample respondent names. The response rate on the RVS survey was 61% with 71.6% of the respondents Generation X and 28.4% Baby Boomers. Sixteen (29%) of the respondents are managers, defined as having two or more direct reports, and 39 (71%) are workers. The completed surveys were factor analyzed and the resulting factors were then orthogonally rotated. Based on the resulting factor patterns, the four

factors were defined: Relational, Reliability, Creativity, and Competence.

Results

The test results indicate that the industry is highly homogeneous across the two generations tested regardless of work role. The absence of work value differences between GenX and Baby Boomers supports a theory that the major difference between these generations is experience. The most interesting finding is that GenX workers and managers place the least emphasis on interpersonal skills compared to their Baby Boomer counterparts who value reliability the least. While this value rating reflects how GenXers see themselves, it may explain why Baby Boomers and the media view GenXers as disrespectful of authority and difficult to manage. A very interesting finding is that different age groups within each generation valued different work values. Older Baby Boomers value competence while Baby Boomers born between 1955 and 1959 value interpersonal skills and the youngest Baby Boomer age group value reliability. The same pattern was found within the GenX generation. Older GenXers value competence while the middle age group value creativity and the youngest group value reliability the most.

The findings from this study cannot be generalized beyond the entrepreneurial software technology industry. The finding that GenX and Baby Boomers hold very similar work values is a significant contribution to the field of study. This finding is counter to popular myth and sets a foundation for further research into effective management models for the future. The finding that GenXers place more emphasis on competence requires more study to understand how this work value fits into their perspective of work/life balance and organizational success. Further research is needed to determine if the commonality of work values between GenX and Baby Boomer is present in larger, more complex software companies, in other industries and other geographic cultures beyond the United States.

Literature Review

Corporations are facing a number of challenges including managing an increasingly diverse workforce, changing management practices and organization forms. Organizations and individuals are increasingly changing how work is organized, managed, and conducted (Leana and Barry 2000). Organizations are seeking increased flexibility while individuals are seeking more stimulation and variety in their work.

The external environment determines in large part an organization's internal structures and processes. How an organization responds to external stimuli leads management to create a structure designed to address these types of stimuli. Organizational structures based on past stimuli cannot adequately address today's external environment (Kourteli 2000). As organizations strive for flexibility to become more adaptable, competitive, cost efficient, and organic (Leana and Barry 2000) their organization structures must change. New organization structures must balance the needs of the organization with the needs of the individual employee. Yales and Davis (2001) have put forth the concept that work should be structured around the "knowledge worker" instead of the machine.

The knowledge worker as the central organizing tenet accurately reflects the nature of the New Economy. The value-creating element of today's economy is the knowledge worker. The market is reverting back to "free agent" or market-mediated employment. The temporal relationship organizations have with knowledge workers makes flexibility a double-edged sword. On one hand skills can be quickly restructured to gain new competencies yet on the other hand knowledge retention becomes mission critical. The changing relationship of the individual to the organization reflects this tension and the growing need to structure work differently. Emerging organization structures include elements of self-government and teaching organizations (Wolff 1999). Command and control structures are being replaced with people- and process-centric models where management focuses on attracting the best and brightest employees into a "worldwide knowledge-generating and information-leveraging organization" (Wolff 1999).

Organizational capital becomes the productive capacity that leverages the relationships people build within and across organizations.

Individual workplace behavior is shaped by three culture factors: National, occupational, and organizational. Organizational culture impacts workplace behavior the most because it defines the accepted norms, beliefs and social assumptions. Cultures vary based upon six cross organizational variables including process versus results, employee versus job orientation, parochial versus professional identify, open versus closed communications, loose versus tight control, and normative versus pragmatic mentality (Cabrera, Cabrera and Barajas 2001). Studies have shown that the effectiveness of change to an organization is dependent upon whether the current culture can be modified to become more compatible with the change.

A significant challenge facing 21st century organizations is the management of the “Generation X” (GenX) workforce. A study of Fortune 100 companies found that management was aware that GenX expects and needs a different kind of work environment (Bova and Kroth 2001). Understanding each generation’s perspective of work is key to organizing the structure work, defining cultures and organizational values, and recruiting the necessary skills to meet business needs.

The birth years that define GenX from other generations are a debated topic. Some researchers claim GenXers are born between 1965 and 1981 (Bova and Kroth 2001) while others claim 1961 and 1981 (O’Bannon 2001), 1961 to 1980 (Zemke, Raines and Filipczak 1999), and 1965 to 1979 (Pekala 2001). Irrespective of the specific birth years, these young workers have different employment relationship expectations than their parents. These different expectations and the underlying work values of GenXers are redefining the employer-employee relationship. Work values lay the foundation for understanding work attitudes, motivation, and influence perceptions of tasks, work environments, peers and colleagues (O’Bannon 2001).

GenXers grew up with working parents and extended exposure to television’s increasingly negative images. They saw their parents define themselves by their work only to be laid off. The

result is a cynical yet opportunistic group of young workers. GenX can be best described as “freedom-minded, self absorbed people who are individualistic but hungry for relationships.” (Buckley, Beu, Novicevic, and Sigerstad 2001) They view employment as a means to life. A childhood with minimal parental involvement has given rise to a concerted effort to balance work with family life. If work becomes unpleasant or stressful they will leave in order to preserve their perception of life balance. For GenX and organizations the focus of work has shifted to a balance between individualistic interests and organizational needs.

These young workers have expectations of their employers that demand different management practices. GenXers expect to learn and develop new skills through challenging work that will keep them marketable. They value continuous individual learning and look for companies that are evolving into “learning organizations”. They need a sense of identity, belonging and ownership of their work (Kupperschmidt 2000) that includes a role in decision-making. Their individualistic nature compels them to seek work where they have some autonomy and self-control based upon clearly defined work performance standards and constant feedback. GenXers are more tolerant of diversity in the workplace and evaluate work opportunities based on an organization’s values, policies and management practices (Buckley et al 2001). As a result management practices have changed to attract, motivate and lead this workforce. Leading and enabling individuals has taken over from managing and controlling the employee. Linking individual goals and skills with organizational initiatives while managing by promoting self-discipline and self-initiative is the new definition of management. Corporations are faced with the challenge of creating “a work environment where employees can grow, learn, and prosper; where differences are valued; and where employees can be committed to their work and their personal or family life.” (Galinsky 2002)

Management practices and organization structures have not incorporated the expectations let alone leveraged the potential of these young workers. GenX’s disrespect for authority and self-reliant nature coupled with an expectation of immediate payoff from the workplace challenges

traditional beliefs on how to organize work. These beliefs will be further challenged when GenXers begin to focus on social issues they consider important. These issues include market-mediated employment, new leadership models, workplace safety and health and unionization (Loughlin and Barling 2001).

Management theorists have not fully researched the reasons why GenXers behave the way they do. Study findings are not consistent as demonstrated by Jurkiewicz's comparative study into work related motivational factors of GenX and Baby Boomer employees within the public sector. The study found the two groups very similar (Jurkiewicz 2000) and only differing on 3 of 15 work related motivation factors. The Catalyst's "The Next Generation: Today's Professionals, Tomorrow's Leaders" study also found that workers in their mid-20s to mid-30s are not that dissimilar from traditional workers. The study found that younger workers place more importance on personal goals and seek employers that support work/life balance. These workers, however, are similar to Baby Boomers in that they value job security, challenging work, employer reputation, competitive compensation, and high levels of organizational commitment (Catalyst 2001). The younger workers do differ from Baby Boomers in that they will leave an employer if expectations around work/life balance, organizational culture, and estimation of future earnings are not met.

The findings of these studies run counter to other research and literature. GenX work values have not been sufficiently researched to fully understand this generation's differences and its impact on the workplace.

Research Problem

Sociology and organization psychology researchers have conducted few studies on the work attitudes and behaviors of Generation X. Past studies have been either anecdotal with speculative conclusions or focused on issues from the organization's perspective (Loughlin and Barling 2001). Organizational development research has focused on evolving the neoclassical firm to include a human dimension that balances the profit motive with the needs of employees,

communities, and societal norms and values (Tomer 1999). This line of research does not focus on individual and generational work values. Recent studies (Buckley et al 2001, Galinsky 2002, Loughlin and Barling 2001, Catalyst 2001) point to the need for additional research into GenX's work values and their effect on future leadership models and governance structures.

Prior research and current management theories do not define the unique work values of GenX and identify how these work values impact the workplace. Research is needed to understand GenX work values and assess their impact on the workplace so that business leaders can determine if they need to alter management styles to leverage GenX strengths.

The purpose of this descriptive cross-sectional survey research is to test the theory of generational work values that compares work value similarities and differences for GenXers and Baby Boomers in small, entrepreneurial enterprise software technology companies. The independent variables of GenX and Baby Boomer are defined as individuals born between 1965 and 1981 and between 1946 and 1964, respectively. The dependent variable work value is defined as work related principles or beliefs of a person in which they have an emotional investment, and the intervening variables leadership type and organization structure will be statistically controlled in the study. Examination of organization structures, CEO values and their perception of generational differences are important to this study because the impact from value similarities and differences are identified.

Statement of the Research Question

The objective of the Generation X study is to understand the similarities and differences between Generation X and Baby Boomer work values. The research question is: What are the work values of GenX and Baby Boomers? The research question is further defined into five investigative questions:

RQ1a What are the general work values in the software industry that we are studying?

- RQ1b What are the similarities and differences in work values between GenX workers and Baby Boomer workers?
- RQ2 What are the similarities and differences in work values between GenX workers and Baby Boomer managers?
- RQ3a What are the similarities and differences in work values between GenX managers and Baby Boomer workers?
- RQ3b What are the similarities and differences in work values between Gen X managers and Baby Boomer managers?
- RQ4 Do companies modify the work environment to accommodate GenX work values?
- RQ5 Do senior managers employ different styles to manage GenX workers and Baby Boomer workers?

Methodology

Information Gathering Techniques

The study is descriptive in nature and the research design is based on cross-sectional survey research. Descriptive research is not concerned with cause-and-effect relationships rather with gathering information about the current state of the phenomenon. The study used both quantitative and qualitative data collection methods; an experience interview and a web-based Likert scale survey. The survey method was chosen because it is the most cost effective way to gather data on opinions and beliefs from a large sample. Quantitative data was collected through the use of a web-based Rokeach Value Survey (RVS) that measures the work values of GenX and Baby Boomers. A five point Likert scale was used, with 1 = of great importance to 5 = of no importance.

The experience interviews were conducted with the CEO of each sample company. The experience interview is a self-designed instrument selected because it enables the researchers to ask open-ended questions and probe deeper. The survey probes areas include the CEOs'

perceptions of differences in work characteristics of GenX managers and workers, challenges and opportunities GenX workers present, instances where the work environment has been changed to accommodate GenX work characteristics, and whether the CEO manages direct reports differently based upon their generation. Every attempt was made to conduct the interviews face-to-face; when that was not feasible the interview was conducted over the telephone. The CEO interview guide is included in Appendix A.

The second survey is a web-based values Likert scale survey that was administered to a random sample of employees within the sample companies. The web response mechanism was selected because of its efficient for respondents and researchers. Zoomerang is the web survey tool vendor, which enables the research team to easily track the sample response rate. The web-based survey is based on the Rokeach Value Survey, a proven self-administered value inventory that measures terminal and instrument value items.

Milton Rokeach's book, "The Nature of Human Values" (1973) caused a surge of empirical studies that investigated the role of human values in many branches of psychology and sociology. Before Rokeach's book, the study of human values was considered at the philosophical realm with no operational meaning. Allport, Vernon, and Lindzey (1951) were among the first social scientists to give value concept a more concrete meaning by linking values to day-to-day activities such as reading the newspaper, watching movies or voting. In their method, a person's values were determined based on the analysis of a person's day-to-day personal and social activities. This method of values determination was unduly limited because of its heavy subjective nature in value assignment. Rokeach (1973) argued that the total number of values people possess is relatively small and that all individuals possess the same values, but in different degrees. Rokeach established two general value types with each consisting of 18 values. He classifies the first type as Instrumental values, which emphasize the methods or the means of accomplishing an end. The second type is classified as Terminal values, which emphasize an end or outcome.

Rokeach designed the Rokeach Value Survey (RVS) to assign operational meaning to the concept of values. Since then many researchers have adopted RVS as an instrument for measuring personal and social values. Bigoness and Blakely utilized the 18 instrumental values of RVS to conduct a cross-national study of managerial values (1996). Schmidt and Posner (1982) employed the same 18 instrumental values to assess which of these values were most important in the work place. Since the 18 instrumental values RVS survey has been widely used in previous research studies, it is reasonable to state that the reliability and validity of RVS has been empirically proven to be a viable instrument for work values assessment.

For this study, the format of the original RVS was altered from rank order into Likert scale. A Likert scale version is used because of its apparent advantages: (1) The forced comparison of values which is inherent to the hierarchical ranking procedure is avoided; (2) It allows an individual to equally score values that are equally important to them, making their answers more valid; and (3) It enables normative statistical tests to be performed on the data. Survey respondents were asked to indicate to what extent they thought each of the values is important to them. Items were rated on a five point Likert scale ranging from (1) of great importance, (2) of much importance, (3) of some importance, (4) of little importance and (5) of no importance. A total of 125 licenses of the Rokeach Value Survey were purchased for use with the random sample of employees. It is estimated that it should take each respondent about 5 minutes to complete the RVS, which is included in Appendix B.

Prior to the use of both survey tools in the study, a pilot was conducted to validate the survey designs, ensure the correct data elements are collected to support the planned data analysis, and there are no unexpected extraneous factors that might affect the findings. The CEO survey was pilot tested with a convenience sample of 3 CEOs that are not part of the study's sample population. The web based Rokeach Value Survey was tested with a convenience sample of 12 Golden Gate University doctorate students attending the Summer 2002 Research Methods course.

No problem areas were identified in the pilot studies associated with the readability or understandability of the interview questions or RVS questionnaire.

Sampling Plan

The population for this study is small software technology firms that sell packaged applications to enterprises with annual revenues in excess of \$250 million. The sampling frame for accessing this population is a convenience sample of New Business Strategies' clients, prospects and "friends of the firm". Invited to participate were the Firm's clients and prospects that met the sample criteria of software technology companies that have been in business for ten or fewer years with less than 150 employees worldwide. The convenience sample companies were selected based upon their proximity to the research team. The sample size is 10 companies and within each sample company 10 randomly sampled employees for a total of 100 sample respondents. A total of nine companies participated in the study and provided a total of 90 sample respondent names. The sample of employee respondents was random sampled by alphabetizing the employee list by last name and selecting every 10th name.

Data Gathering

The research team conducted nine interviews with the CEOs of software companies during the summer of 2002. Seven of the interviews were conducted in person and two by telephone. The purpose of the interview was to gather demographic information on the CEOs and companies and to identify the organization structure, management style and reporting structure of the organization. The mean age of the nine companies in the study is 4.1 years. The sample companies were 20% public and 80% privately held. Of the nine companies in the study, 30% were profitable and 70% were not profitable. The mean age of the CEOs interviewed is 51.5 years with a range of 47.5 to 63.5 years. The mean number of years in a leadership position for the CEOs is 5.9 years with a range of 3 to 10 years.

60% of the CEOs indicated they have a mechanistic and 40% an organic organizational structure. The management style of the nine companies broke down into the following categories:

40% were hierarchical, 30% ad-hoc-like, 20% functioned as a clan, and 10% were market based. 60% of the CEOs indicated that they had at least one Generation X employee as a direct report with 30% reporting two to four Gen X direct reports and 10% with over five.

The research team sent out the web-based RVS questionnaire to 90 employees based on the random list provided by the companies and received 55 responses for a response rate of 61%. The mean percentage of Generation X to Baby Boomer workers for the nine companies is 71.6% were Generation X and 28.4% were Baby Boomer. Sixteen (29%) of the respondents are managers, defined as having two or more direct reports, and 39 (71%) are workers. Non-respondents were contacted by email up to three times to encourage a higher response rate.

To derive work values, the results of the RVS are subjected to the principal components analysis and then by orthogonal rotation varimax. Principal components analysis transforms the 18 items obtained from RVS into a new set of principle components that are not correlated with each other. The value loading of 0.40 or greater is regarded as contributing to a factor. After determining the factors, ANOVA tests were performed to ascertain the statistical significance between the dependent and independent variables. The significance level is set at 5%, which denotes a 95% confidence level of the test results. The p-value of each test was calculated and statistical significance was established for each test that showed a p-value of less than 0.05.

The following hypotheses were defined for each research question:

RQ1a

Ho1a There are no population mean differences in work values of workers in the software industry.

Ha1a There are population mean differences in work values of workers in the software industry.

RQ1b

Ho1b There are no population mean differences in work values between GenX workers and Baby Boomer workers.

Ha1b There are population mean differences in work values between GenX workers and Baby Boomer workers.

RQ2

Ho2 There are no population mean differences in work values between GenX workers and Baby Boomer managers.

Ha2 There are population mean differences in work values between GenX workers and Baby Boomer managers.

RQ3a

Ho3a There are no population mean differences in work values between GenX managers and Baby Boomer workers.

Ha3a There are population mean differences in work values between GenX managers and Baby Boomer workers.

RQ3b

Ho3b There are no population mean differences in work values between GenX managers and Baby Boomer managers.

Ha3b There are population mean differences in work values between GenX managers and Baby Boomer managers.

RQ4

Ho4 Companies do not modify their work environments to accommodate GenX work values.

Ha4 Companies modify their work environments to accommodate GenX work values.

RQ5

Ho5 Senior managers use different management styles to when managing GenX and Baby Boomers.

Ha5 Senior managers use the same management style when managing GenX and Baby Boomers.

Data Analysis

The study uses the age range of Baby Boomers as between 1940 and 1964 and GenX as those individuals born between 1965 and 1979 as defined James Engel, Roger Blackwell and Paul Miniard in “Consumer Behavior, 6th Edition”.

The completed surveys were factor analyzed and the resulting factors were further tested with the Scree Test to determine the appropriate number of factors to retain for rotation. The resulting factors were then orthogonally rotated. Based on the resulting factor patterns, the factors were developed by assigning an item to the dimension to which it had the highest factor loading. The minimum item loading was greater than or equal to 0.40. The factor analysis identified four factors because they showed no factor complexity. The cumulative percent of variance indicated that the five scales accounted for 55.675% of the variances and is included in Table 1. The table on the following page lists the results of the factor analysis:

| Factor 1 “Relational” | Factor 2 “Reliability” | Factor 3 “Creativity” | Factor 4 “Competence” |
|--|--|----------------------------------|------------------------------------|
| Loving Loyal Courageous Forgiving Broad Minded Honest | Responsibility Polite Self-Controlled Helpful Obedient | Ambitious Imaginative | Logical Capable Intellectual |

After the four factors were determined two more data analysis processes were employed. The first statistical test measured the first research question by testing the relative importance of each value factor for the entire sample. The mean ranking of each RVS instrument value was calculated and is included in Table 2. The mean number indicates the lower the mean the higher the importance of the factor. The following lists the order of mean ranking:

- Competence (Factor 4) (M=1.67)
- Creativity (Factor 3) (M=1.77)
- Reliability (Factor 2) (M=1.78)

Relational (Factor 1) (M=1.87)

The second statistical test uses ANOVA analysis to find significant differences between each factor and the four combinations of GenX and Baby Boomer Managers as stated in research questions RQ1b through to 3b.

The ANOVA tests indicate there are no differences between GenX and Baby Boomer workers across all four factors (RQ1b); no differences between GenX managers and Baby Boomer workers across all four factors (RQ3a); and no differences between GenX managers and Baby Boomer managers across all four factors (RQ3b). The p-values between the dependent and independent variables exceeded the significance level of 0.05. The ANOVA test found statistical significant differences between GenX workers and Boomer managers on all four factors (RQ2). The p-values between the dependent and independent variables were less than the significance level of 0.05. The details of the ANOVA tests are included in Table 3.

Nine CEOs were interviewed from nine different companies to find out if companies modify their work environments to accommodate GenX values (RQ4) and to find out if they use different styles to when managing GenX workers (RQ5). Through the interviews, we assigned the working environment of each company as either being mechanistic or organic. We also used the same process to assign leadership style of each CEO. The leadership style of each CEO was classified as either being Clan, Adhocracy, Hierarchy or Market (Appendix A). Their opinions were validated with the their employees responses to the RVS survey in questions 24 and 25.

Results

For RQ1a, our sample population considered being competent (Factor 4) as the most important work value. The group considered the relational construct (Factor 1) as the least important work value. The sample population considered creativity and reliability work values as equally important, Factors 2 and 3, respectively. For RQ1b, RQ3a and RQ3b, there were no differences in work values between GenX workers and Baby Boomer workers. Population mean

differences with statistical significance are found between the four factors and different generations.

Both Baby Boomer managers and GenX workers viewed being competent (Factor 4) as the most important work value. Baby Boomer managers viewed reliability (Factor 2) as the least important work value while GenX workers viewed relational (Factor 1) as the least important work value.

The results also showed that Baby Boomer managers born between 1950 and 1954 seemed to place more emphasis on being competent (Factor 4) whereas Baby Boomer managers born between 1955 and 1959 placed more emphasis on the relational factor (Factor 1). Baby Boomer managers born between 1960 and 1964 placed more emphasis on reliability than their peers.

GenX workers born between 1965 and 1969 seemed to place heavier emphasis in being competent (Factor 4). Those born between 1970 and 1974 tended to place heavier emphasis on creativity (Factor 3). And finally, those born between 1975 and 1979 placed heavier emphasis on reliability (Factor 2) as the most important work value.

The research team accepted the null hypothesis for RQ1a, RQ1b and RQ3a. There are no population mean differences in work values between GenX and Baby Boomer generations. There are no population mean differences in work values between GenX and Baby Boomer workers and between GenX managers and Baby Boomer workers. The research team failed to reject the null hypothesis for RQ2 and RQ3a because of the differences found on the Factors.

For RQ 4, interviews were conducted with ten CEOs in the Silicon Valley software industry. The CEOs indicated that they do not modify their work environments to accommodate Gen X work values. One CEO commented "we look to hire and train the best talent we can in the marketplace and do not make any special accommodations for newer employees according to age or desires." Another CEO said, "some of the best workers we have are Gen X, we pay good wages and benefits and expect our employees to perform at their best". Like Baby Boomers, Gen X workers must be innovative, flexible and talented for high tech companies to remain competitive in

this business environment. On their part, CEOs interviewed realize that a happy employee is a productive one. When necessary, the work environment is altered to allow for flexibility and work/life balance. These accommodations are inclusive of all employees. However, the perspective is different within GenX workers, 51.85% of the GenXers respondents in our survey stated that their companies altered the working environment to accommodate their values and 45.15% stated that they did not observe any change in working environment to accommodate their values.

For the last research question, RQ5, the CEOs indicated they do not employ different management styles in managing Gen X direct reports compared to Baby Boomer direct reports. One CEO commented that "we all work long hours, sometimes 14-15 hours a day, to finish a project and then let up once it is done". Another CEO said, "We instill discipline to be able to make sound decisions." The CEOs indicated that they have open discussions, feedback, and forums for constructive criticism but retain a power structure for decision-making and responsibility. In the highly competitive world of software technology, innovation and fast decision-making are crucial for a company's survival. Without order, responsibility and discipline, chaos would reign. The absence of change in management style from the CEOs opinion was further validated by responses we received from the GenX workers in our sample. 88.89% of the responses stated that their company did not observe management alter their management styles to accommodate their work values. Only 11.11% of the employees stated that they observed the change in management styles in their companies to accommodate their needs.

The last two research questions, RQ4 and RQ5, confirm the results of the RVS work values survey. The findings of this study support the conclusions drawn from the Jurkiewicz comparative study into work related motivational factors and the Catalyst next generation study. Contrary to common beliefs, and what is often written in the business press, Gen X workers do not seem to have significantly different work values or special demands to warrant significant changes in management style or work environments within software technology organizations. CEOs

interviewed praised GenX employees for their dedication, hard work, flexibility and trustworthiness. They also indicated that they would not hesitate to promote Gen X employees to power positions in the company as opportunities arise.

Discussion

The results of the data analysis provide an interesting picture of our sample in the software technology industry. The test results indicate that the industry is highly homogeneous across the two generations tested regardless of work role. Workers in the software industry value competence more than other work values.

The software technology industry is based on innovation and the ability to secure a market beachhead faster than the competition. Domain knowledge, both technical and market, are critical to success for these employees and their employers. The difference between companies becoming leaders, even minor ones, and failure rests mainly with the competence of their employees and management teams. This is so important that companies recruit and hire based upon the capabilities of employees and candidates, thereby contributing to homogeneity across the industry on this work value.

The absence of work value differences between GenX and Baby Boomers supports a theory that the major difference between these generations is experience. As GenX workers and managers gain more on-the-job work experience they will become similar to Baby Boomers in terms of competencies and work values. The most interesting finding is that GenX workers and managers place the least emphasis on interpersonal skills compared to their Baby Boomer counterparts who value reliability the least. While this value rating reflects how GenXers see themselves, it may explain why Baby Boomers and the media view GenXers as disrespectful of authority and difficult to manage. The finding that Baby Boomers do not value reliability as much as competence may explain the perception that this generation is all about “me”. It could well be that Baby Boomer perceptions of GenX are distorted because they, along with the media, have

tried to explain generational differences within the context of their own values. The result is a mischaracterization and stereotyping based on dress, language, and other cultural items of a generation isn't really all that different when it comes to how they work.

A very interesting finding is that different age groups within each generation valued different work values. Older Baby Boomers value competence while Baby Boomers born between 1955 and 1959 value interpersonal skills and the youngest Baby Boomer age group value reliability. The same pattern was found within the GenX generation. Older GenXers value competence while the middle age group value creativity and the youngest group value reliability the most. Of particular interest in the findings is that the youngest age group of Baby Boomers and GenX both value Reliability the most.

The researchers believe that older Baby Boomers and GenXers realize that employee value is rooted in competence and that the youngest age groups of both generations realize that they need to become dependable, proven assets to the company while they deepen their competencies. The middle age groups of both generations have different values as they are in transition both within the organizational hierarchy, value creation, and skill depth. The study did not probe deeper into specific values and participant perceptions through open-ended interviews.

The final point is that entrepreneurial software companies attract similar types of employees regardless of age. The challenge of making a company grow and become successful requires a different set of skills, from managers and workers alike, than sustaining the momentum of a large established company in a mature, stable industry. Entrepreneurial CEOs set the tone of organizations and often hire in their likeness from a work values perspective to create a company culture that bond its employees together in the quest for a common goal. The last interesting finding is that CEOs did not believe they had altered work environments to accommodate generational work characteristics yet a majority of GenX workers felt that the management policies had changed. The study did not expect to find this dichotomy. While entrepreneurial CEOs tend to be very 'hands on' they often rely on their direct reports to manage the culture and

work environment to meet the needs of the company and the workers. The research team believes that GenX managers and younger Baby Boomer managers manage GenX workers differently by structuring work activities differences. These differences include telecommuting, flextime hours, ability to have varying degrees of self-direction, and increased feedback on work tasks.

The findings from this study cannot be generalized beyond the entrepreneurial software technology industry. The finding that GenX and Baby Boomers hold very similar work values is a significant contribution to the field of study. This finding is counter to popular myth and sets a foundation for further research into effective management models for the future. The finding that GenXers place more emphasis on competence requires more study to understand how this work value fits into their perspective of work/life balance and organizational success.

The study sample size is too small to allow comparisons with larger organizations in the software technology industry or across the country. While the RVS survey response rate was high the sample size of 90 employees is too small to support any generalization beyond Silicon Valley small, entrepreneurial software companies. A weakness was found with the CEO experience survey. While the pilot survey did not indicate any issues with understandability when the research team implemented the survey they found that the CEOs found the questions challenging to answer. Many CEOs had to think about their responses because this was the first time they had been asked to identify differences in work values and behaviors between generations. The experience survey is crucial to understanding the context of the organization and work environment. In future studies the survey tool should be redesigned to capture information at an informational versus conceptual level.

Further research is needed to determine if the commonality of work values between GenX and Baby Boomer is present in larger, more complex software companies, in other industries and other geographic cultures beyond the United States. An additional research area is to further investigate the intra-generational work value differences.

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Appendix A

CEO Interview Script

Date:

Interviewer:

Unique ID#: _____

CEO name: _____

Email address: _____

Company name: _____

Address: _____

Interview:

1. How would you characterize the company's organization structure?

- Mechanistic (characterized by specialized differentiation of functional tasks, hierarchic structure of control, authority, communication, vertical interaction, loyalty to the company and obedience to superiors, value of local knowledge)
- Organic (characterized by contribution of specialized knowledge and experience to the task, network structure of control, authority, etc., lateral communication, advise and information base communication vs. directives, company goal attainment and technological ethos, organization affiliation prestige)
- Comments (open ended)

2. How would you characterize the company's management style?

- Facilitator
- Mentor
- Innovator
- Entrepreneur
- Visionary
- Hard driver
- Competitor
- Producer
- Coordinator
- Monitor
- Organizer

- Comments: (open ended)

3. What are your values for the Company?

- empowerment
- teambuilding
- employee involvement
- human resource development
- open communication
- surprise and delight
- create new standards
- anticipate needs
- continuous improvement
- creative solution finding
- error detection
- measurement
- process control
- systematic problem solving
- applying quality tools
- measuring customer preferences
- improving productivity
- creating partnerships
- enhancing competitiveness
- involving customers and suppliers

4. How many of your direct reports are Generation X?

- 0 – 1
- 2 – 4
- 5+
 - a. Do you manage your Generation X direct reports differently than your non-GenX direct reports?
 - Yes
 - No
 - b. If yes, how? (open ended)

5. What, in your opinion, are the major differences in the work characteristics of Generation X **MANAGERS** and Generation X **workers/individuals**? (open ended)

6. What challenges and opportunities have GenerationXers presented this company?
- a. Challenges

 - b. Opportunities
7. Have you changed any company policies or management techniques to more successfully manage Generation X employees?
- yes
 - no
 - a. If yes, describe the circumstances, changes and effects before and after. (open ended)
8. Is there anything you want to add that we have not covered? (open ended)

Company primary business: _____

Year founded: ____ # Employees worldwide: ____

Public/Private: Profitable: yes=1 no=2

- Public
- Private

Employee Breakdown: ____% GenX ____ % BB ____ % Other

CEO Demographics:

Year born:

- 1945 – 1950
- 1951 – 1955
- 1956 – 1960
- 1961 – 1966

Total # years as a CEO/COO/President/CoB:

- 0 – 2
- 3 – 5
- 5 – 10
- 10+

Appendix B





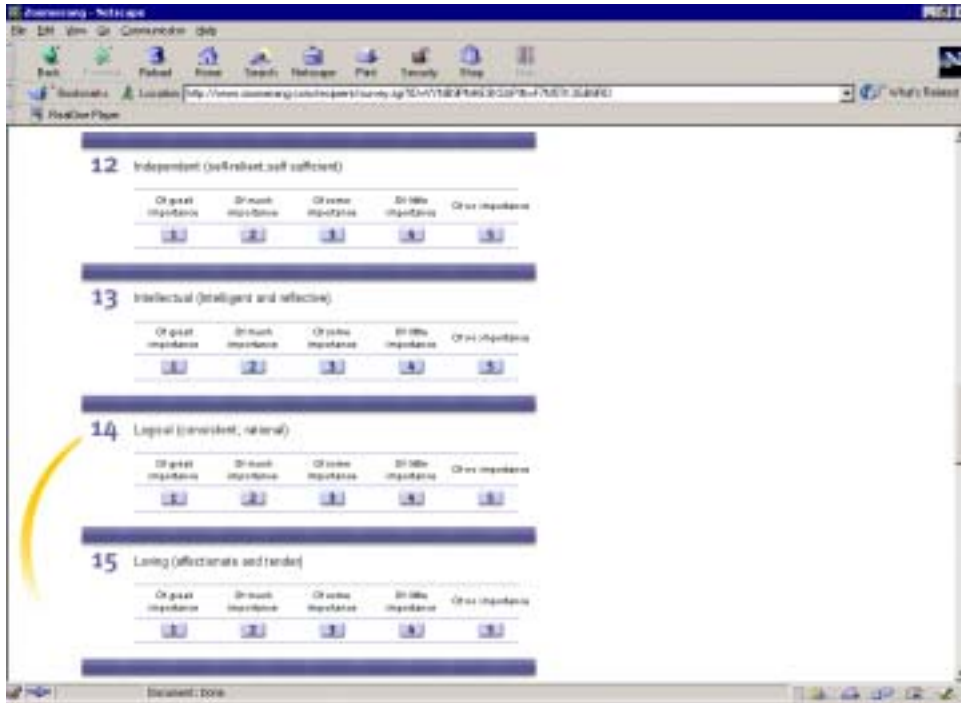




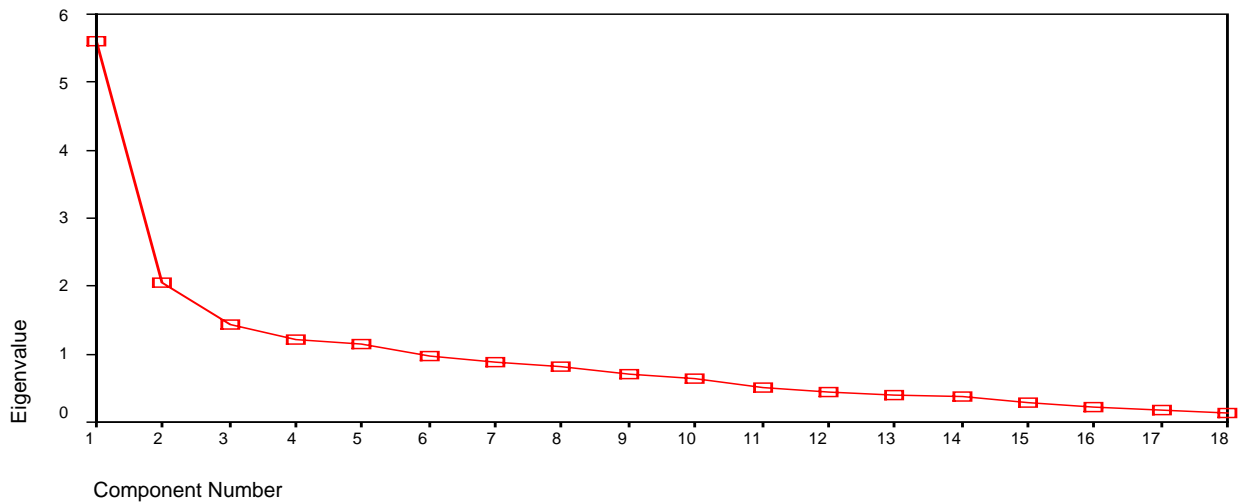
Table 1

Total Variance Explained

| Component | Initial Eigenvalues | | | Rotation Sums of Squared Loadings | | |
|-----------|---------------------|---------------|--------------|-----------------------------------|---------------|--------------|
| | Total | % of Variance | Cumulative % | Total | % of Variance | Cumulative % |
| 1 | 5.609 | 31.163 | 31.163 | 3.256 | 18.089 | 18.089 |
| 2 | 2.049 | 11.381 | 42.545 | 2.765 | 15.363 | 33.453 |
| 3 | 1.428 | 7.932 | 50.476 | 2.117 | 11.761 | 45.214 |
| 4 | 1.214 | 6.744 | 57.220 | 1.883 | 10.461 | 55.675 |
| 5 | 1.145 | 6.359 | 63.579 | 1.423 | 7.904 | 63.579 |
| 6 | .979 | 5.438 | 69.017 | | | |
| 7 | .874 | 4.854 | 73.871 | | | |
| 8 | .819 | 4.549 | 78.420 | | | |
| 9 | .714 | 3.964 | 82.384 | | | |
| 10 | .645 | 3.584 | 85.968 | | | |
| 11 | .504 | 2.803 | 88.771 | | | |
| 12 | .441 | 2.450 | 91.221 | | | |
| 13 | .396 | 2.200 | 93.421 | | | |
| 14 | .370 | 2.058 | 95.479 | | | |
| 15 | .293 | 1.627 | 97.106 | | | |
| 16 | .210 | 1.166 | 98.273 | | | |
| 17 | .184 | 1.021 | 99.294 | | | |
| 18 | .127 | .706 | 100.000 | | | |

Extraction Method: Principal Component Analysis.

Scree Plot



Rotated Component Matrix^a

| | Component | | | | |
|---------------------|-----------|-----------|-----------|-----------|-----------|
| | 1 | 2 | 3 | 4 | 5 |
| Q15_Loving | .864 | .117 | 3.149E-02 | -1.37E-02 | 8.273E-03 |
| Q16_Loyal | .730 | .298 | .104 | -.110 | -5.94E-02 |
| Q7_Courageous | .671 | 1.050E-02 | .178 | .110 | .353 |
| Q8_Forgiving | .659 | .467 | -.131 | .120 | 2.038E-02 |
| Q4_Brd_Mind | .549 | .104 | .263 | .159 | 6.985E-02 |
| Q10_Honest | .488 | 3.974E-02 | .321 | .229 | -.473 |
| Q19_Responsible | 5.080E-02 | .744 | 2.626E-02 | .244 | .229 |
| Q18_Polite | .243 | .689 | .228 | -.106 | -3.93E-02 |
| Q20_Self-Controlled | .120 | .647 | .474 | .210 | -.168 |
| Q9_Helpful | .421 | .627 | -.185 | 2.719E-02 | .131 |
| Q17_Obedient | .139 | .616 | .326 | .333 | .229 |
| Q3_Ambitious | 3.042E-02 | 8.493E-02 | .823 | .176 | .162 |
| Q11_Imaginative | .200 | .149 | .640 | -.139 | .151 |
| Q14_Logical | 6.739E-02 | 6.750E-02 | -.170 | .802 | 1.069E-02 |
| Q5_Capable | -.140 | .276 | .262 | .615 | .245 |
| Q13_Intellectual | .327 | 6.837E-02 | .437 | .584 | -8.25E-02 |
| Q12_Independent | 9.987E-02 | .108 | .213 | 7.502E-02 | .755 |
| Q6_CLEAN | .314 | .292 | .212 | .348 | .478 |

Extraction Method: Principal Component Analysis.
 Rotation Method: Varimax with Kaiser Normalization.
 a. Rotation converged in 8 iterations.

Table 2

RQ1 - General

| ID | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
|---------------------------|----------|----------|----------|----------|
| Between 1940 and 1944_No | 1.17 | 1.60 | 1.00 | 1.67 |
| Between 1945 and 1949_No | 2.20 | 1.96 | 2.10 | 1.67 |
| Between 1945 and 1949_No | 2.20 | 1.96 | 2.10 | 1.67 |
| Between 1950 and 1954_No | 1.83 | 1.92 | 2.30 | 1.69 |
| Between 1950 and 1954_Yes | 1.56 | 1.87 | 1.67 | 1.33 |
| Between 1955 and 1959_No | 1.83 | 2.07 | 2.33 | 1.78 |
| Between 1955 and 1959_Yes | 1.78 | 2.33 | 1.83 | 2.11 |
| Between 1960 and 1964_No | 1.89 | 1.67 | 1.67 | 1.56 |
| Between 1960 and 1964_Yes | 1.97 | 1.68 | 1.90 | 1.73 |
| Between 1965 and 1969_No | 1.63 | 1.44 | 1.60 | 1.27 |
| Between 1965 and 1969_Yes | 2.00 | 1.40 | 1.00 | 2.00 |
| Between 1970 and 1974_No | 2.09 | 1.87 | 1.83 | 1.85 |
| Between 1970 and 1974_Yes | 2.22 | 1.65 | 1.75 | 1.58 |
| Between 1975 and 1979_No | 1.83 | 1.53 | 1.69 | 1.54 |
| Mean | 1.87 | 1.78 | 1.77 | 1.67 |

Table 3

RQ2a - GenXer Workers and Boomer Workers

| ID | CodeNM | Code | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
|--------------------------|---------|------|----------|----------|----------|----------|
| Between 1940 and 1944_No | Boom_Wk | 1 | 1.17 | 1.60 | 1.00 | 1.67 |
| Between 1945 and 1949_No | Boom_Wk | 1 | 2.20 | 1.96 | 2.10 | 1.67 |
| Between 1945 and 1949_No | Boom_Wk | 1 | 2.20 | 1.96 | 2.10 | 1.67 |
| Between 1950 and 1954_No | Boom_Wk | 1 | 1.83 | 1.92 | 2.30 | 1.69 |
| Between 1955 and 1959_No | Boom_Wk | 1 | 1.83 | 2.07 | 2.33 | 1.78 |
| Between 1960 and 1964_No | Boom_Wk | 1 | 1.89 | 1.67 | 1.67 | 1.56 |
| Between 1965 and 1969_No | Xer_Wk | 3 | 1.63 | 1.44 | 1.60 | 1.27 |
| Between 1970 and 1974_No | Xer_Wk | 3 | 2.09 | 1.87 | 1.83 | 1.85 |
| Between 1975 and 1979_No | Xer_Wk | 3 | 1.83 | 1.53 | 1.69 | 1.54 |

ANOVA - Factor 1

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|-------------|----|----------|----------|----------|----------|
| Between Groups | 0.156703225 | 1 | 0.156703 | 0.284267 | 0.601246 | 4.493998 |
| Within Groups | 8.820059827 | 16 | 0.551254 | | | |
| Total | 8.976763052 | 17 | | | | |

ANOVA - Factor 2

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|-------------|----|----------|----------|---------|----------|
| Between Groups | 0.0561125 | 1 | 0.056112 | 0.106882 | 0.74796 | 4.493998 |
| Within Groups | 8.399933333 | 16 | 0.524996 | | | |
| Total | 8.456045833 | 17 | | | | |

AnovaFactor 3

ANOVA

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|-------------|----|----------|----------|----------|----------|
| Between Groups | 0.145950039 | 1 | 0.14595 | 0.248259 | 0.625083 | 4.493998 |
| Within Groups | 9.406311728 | 16 | 0.587894 | | | |
| Total | 9.552261767 | 17 | | | | |

ANOVA - Factor 4

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|-------------|----|----------|----------|----------|----------|
| Between Groups | 0.005682306 | 1 | 0.005682 | 0.011056 | 0.917567 | 4.493998 |
| Within Groups | 8.223645298 | 16 | 0.513978 | | | |
| Total | 8.229327604 | 17 | | | | |

Table 3

RQ2b - GenX Workers and Boomer Managers

| ID | CodeNM | Code | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
|---------------------------|---------|------|----------|----------|----------|----------|
| Between 1950 and 1954_Yes | Boom_Mn | 2 | 1.56 | 1.87 | 1.67 | 1.33 |
| Between 1955 and 1959_Yes | Boom_Mn | 2 | 1.78 | 2.33 | 1.83 | 2.11 |
| Between 1960 and 1964_Yes | Boom_Mn | 2 | 1.97 | 1.68 | 1.90 | 1.73 |
| Between 1965 and 1969_No | Xer_Wk | 3 | 1.63 | 1.44 | 1.60 | 1.27 |
| Between 1970 and 1974_No | Xer_Wk | 3 | 2.09 | 1.87 | 1.83 | 1.85 |
| Between 1975 and 1979_No | Xer_Wk | 3 | 1.83 | 1.53 | 1.69 | 1.54 |

ANOVA - Factor 1

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|----------|----|----------|----------|----------|----------|
| Between Groups | 1.428811 | 1 | 1.428811 | 8.395197 | 0.015903 | 4.964591 |
| Within Groups | 1.701939 | 10 | 0.170194 | | | |
| Total | 3.13075 | 11 | | | | |

ANOVA - Factor 2

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|----------|----|----------|----------|----------|----------|
| Between Groups | 1.532484 | 1 | 1.532484 | 7.618013 | 0.020127 | 4.964591 |
| Within Groups | 2.011658 | 10 | 0.201166 | | | |
| Total | 3.544141 | 11 | | | | |

ANOVA - Factor 3

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|----------|----|----------|----------|----------|----------|
| Between Groups | 1.671911 | 1 | 1.671911 | 10.65137 | 0.008521 | 4.964591 |
| Within Groups | 1.569667 | 10 | 0.156967 | | | |
| Total | 3.241578 | 11 | | | | |

ANOVA - Factor 4

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|----------|----|----------|---------|----------|----------|
| Between Groups | 2.220552 | 1 | 2.220552 | 11.0003 | 0.007791 | 4.964591 |
| Within Groups | 2.018629 | 10 | 0.201863 | | | |
| Total | 4.239181 | 11 | | | | |

Table 3

RQ2c - GenXer Managers and Boomer Workers

| ID | CodeNM | Code | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
|---------------------------|---------|------|----------|----------|----------|----------|
| Between 1940 and 1944_No | Boom_Wk | 1 | 1.17 | 1.60 | 1.00 | 1.67 |
| Between 1945 and 1949_No | Boom_Wk | 1 | 2.20 | 1.96 | 2.10 | 1.67 |
| Between 1945 and 1949_No | Boom_Wk | 1 | 2.20 | 1.96 | 2.10 | 1.67 |
| Between 1950 and 1954_No | Boom_Wk | 1 | 1.83 | 1.92 | 2.30 | 1.69 |
| Between 1955 and 1959_No | Boom_Wk | 1 | 1.83 | 2.07 | 2.33 | 1.78 |
| Between 1960 and 1964_No | Boom_Wk | 1 | 1.89 | 1.67 | 1.67 | 1.56 |
| Between 1965 and 1969_Yes | Xer_Mn | 4 | 2.00 | 1.40 | 1.00 | 2.00 |
| Between 1970 and 1974_Yes | Xer_Mn | 4 | 2.22 | 1.65 | 1.75 | 1.58 |

ANOVA - Factor 1

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|-------------|----|----------|----------|----------|----------|
| Between Groups | 0.112122662 | 1 | 0.112123 | 0.109491 | 0.745625 | 4.600111 |
| Within Groups | 14.33649949 | 14 | 1.024036 | | | |
| Total | 14.44862216 | 15 | | | | |

ANOVA - Facator 2

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|-------------|----|----------|----------|----------|----------|
| Between Groups | 0.003117361 | 1 | 0.003117 | 0.003146 | 0.956064 | 4.600111 |
| Within Groups | 13.8730875 | 14 | 0.990935 | | | |
| Total | 13.87620486 | 15 | | | | |

ANOVA - Factor 3

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|-------------|----|----------|----------|----------|----------|
| Between Groups | 0.00390625 | 1 | 0.003906 | 0.003526 | 0.953492 | 4.600111 |
| Within Groups | 15.51190972 | 14 | 1.107994 | | | |
| Total | 15.51581597 | 15 | | | | |

ANOVA - Factor 4

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|-------------|----|----------|----------|----------|----------|
| Between Groups | 0.009834028 | 1 | 0.009834 | 0.010098 | 0.921381 | 4.600111 |
| Within Groups | 13.63403441 | 14 | 0.97386 | | | |
| Total | 13.64386844 | 15 | | | | |

Table 3

RQ2d - GenX Managers and Boomer Managers

| ID | CodeNM | Code | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
|---------------------------|---------|------|----------|----------|----------|----------|
| Between 1950 and 1954_Yes | Boom_Mn | 2 | 1.56 | 1.87 | 1.67 | 1.33 |
| Between 1955 and 1959_Yes | Boom_Mn | 2 | 1.78 | 2.33 | 1.83 | 2.11 |
| Between 1960 and 1964_Yes | Boom_Mn | 2 | 1.97 | 1.68 | 1.90 | 1.73 |
| Between 1965 and 1969_Yes | Xer_Mn | 4 | 2.00 | 1.40 | 1.00 | 2.00 |
| Between 1970 and 1974_Yes | Xer_Mn | 4 | 2.22 | 1.65 | 1.75 | 1.58 |

ANOVA - Factor 1

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|----------|----|----------|----------|----------|----------|
| Between Groups | 2.007787 | 1 | 2.007787 | 3.180767 | 0.112354 | 5.317645 |
| Within Groups | 5.049819 | 8 | 0.631227 | | | |
| Total | 7.057605 | 9 | | | | |

ANOVA - Factor 2

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|----------|----|----------|----------|----------|----------|
| Between Groups | 2.57049 | 1 | 2.57049 | 3.891138 | 0.084006 | 5.317645 |
| Within Groups | 5.284809 | 8 | 0.660601 | | | |
| Total | 7.855299 | 9 | | | | |

ANOVA - Factor 3

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|----------|----|----------|----------|----------|----------|
| Between Groups | 3.42225 | 1 | 3.42225 | 5.139585 | 0.053133 | 5.317645 |
| Within Groups | 5.326889 | 8 | 0.665861 | | | |
| Total | 8.749139 | 9 | | | | |

ANOVA - Factor 4

| Source of Variation | SS | df | MS | F | P-value | F crit |
|---------------------|----------|----|----------|----------|----------|----------|
| Between Groups | 2.744596 | 1 | 2.744596 | 4.226891 | 0.073824 | 5.317645 |
| Within Groups | 5.194543 | 8 | 0.649318 | | | |
| Total | 7.939139 | 9 | | | | |