V. 2.0 · 2026



THE SHIFT 360

Assessment Guide

Acting on demographic change.

Understand	Measure	Prioritize	Act
WHERE IT STARTS	EVIDENCE, NOT INSTINCT	WHERE TO INVEST FIRST	FROM STRATEGY TO IMPACT

shiftchallenge.org
contact@shiftchallenge.org

A new model for new demographics

We're living through the biggest demographic transformation in history. People are living longer and fewer are being born: *The Shift* is redefining how we work, produce, consume, and organize our societies.

Organizations that see this coming have a strategic opening: to go from adapting to leading. That's why The Shift 360 exists—to help them understand, measure, and prioritize action on the impact of demographic change.

+30 years

Life expectancy

How much average lifespan grew over the past century—about four months longer every year.

–50 %

Birth rate

A global decline. Today it's 1.9 children per woman—below replacement level in many economies.

2036

Tipping point

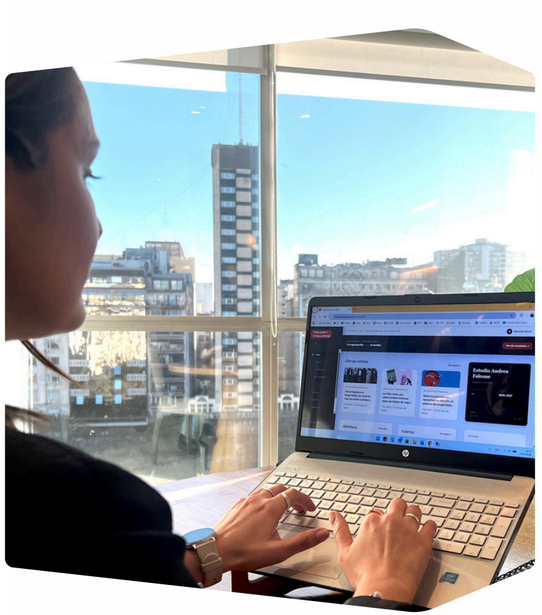
The year there will be, for the first time, more people over 60 than under 10.



"Today's structures were built for a world that no longer exists. This isn't a trend—it's a new social and economic order."

Andrea Falcone
CO-FOUNDER & REGIONAL LEAD, LATIN AMERICA · THE SHIFT

What is *The Shift 360*?



An organizational diagnostic that measures how prepared a company is for demographic change.

Through a set of international standards and structured questions, it surfaces strengths, opportunities, and action priorities across six strategic dimensions.

The process combines diagnosis, benchmarking, and demographic intelligence in a single journey—and ends in a certification that recognizes the organizations that measure and act.

THE PROCESS

01

Assessment

A structured evaluation across 24 questions and 6 dimensions.

02

Benchmark

Comparison against organizations of similar industry and size.

03

Demographic Intelligence

Organizational profile data turned into insight.

04

Impact Review

Tracking progress and evolution over time.

Methodology & maturity scale

24 questions **6** dimensions **3** maturity levels

Each question assesses practices, capabilities, and policies on a three-level scale. Each dimension's score captures how far along the organization is.

LEVEL 1

Initial

The practice doesn't exist yet, or is at a very early stage.

LEVEL 2

Advanced Development

Established, growing practices that are being integrated into strategy.

LEVEL 3

Integrated

Embedded in strategy and operations on an ongoing basis.

THE SIX DIMENSIONS ASSESSED



01 Work, careers & purpose

How the organization adapts work, careers, and professional paths to longer lives.



02 Financial architecture

How it supports people in managing growing longevity and new horizons for retirement.



03 Generational integration

How it fosters cross-generational collaboration and lowers age-related barriers.



04 Health & wellbeing

How it sustains productivity, health, and wellbeing across longer lives.



05 Longevity economy

How it spots opportunities tied to new markets and 50+ consumers.



06 Demographic governance

How it builds demographic change into strategy, decision-making, and risk management.

Certification & *Recognition*

THE SHIFT® CERTIFIED

The Shift Certified

Awarded to organizations that reach a minimum score of 2.0/3 and demonstrate a significant level of readiness for demographic change.

THE SHIFT® COMMITTED

The Shift Committed

Recognizes organizations that are building capabilities and actively working toward alignment with The Shift Standard.

THE SHIFT®
WORK, CARRERS & PURPOSE DISTINCTION

EXCELLENCE DISTINCTIONS

Recognizing outstanding performance in specific dimensions:

- Wellbeing Revolution
- Work, Careers & Purpose
- Generational Integration
- Financial Architecture
- Longevity Dividend & Markets
- Demographic Governance

Organizational Demographic Profile

This section gathers information on the demographic makeup of the organization's workforce and leadership. The data isn't part of the assessment score—it's used to generate benchmarks, comparative analysis, and demographic intelligence.

General Data

- Number of employees
- Country
- Industry

Workforce

- Average age of staff
- % employees 45+
- % employees 55+
- % employees 60+

Leadership

- Average age of leadership
- % leaders under 45
- % leaders 45+

Talent Acquisition

- % new hires 45+ (last 3 years)
- % new hires 45+ (last year)

WHY IT MATTERS

The demographic profile isn't scored—it's the foundation of demographic intelligence. It puts the assessment results in context and lets the organization benchmark itself against peers of similar industry and size.

The Wellbeing *Revolution*

Assesses whether the organization actively fosters work environments that support employees' physical, mental, and social health throughout their entire working lives—recognizing that working conditions directly shape people's health, wellbeing, and ability to sustain long, active, and productive careers.

STRATEGIC WEIGHT
15%

HW1 Healthy Work Environment

Does the organization design its working conditions to actively promote employees' physical, mental, and social wellbeing?

WHAT IT ASSESSES

- How far wellbeing is built into the design of work and working conditions
- Whether the organization creates environments that support energy, connection, and sustainable performance
- Whether it accounts for different life stages and moments in that design

HW2 Health Prevention & Promotion

Does the organization actively promote preventive behaviors and healthy lifestyles among employees across their entire careers?

WHAT IT ASSESSES

- Whether the organization actively promotes a culture of care and prevention
- How much it encourages habits that sustain vitality and wellbeing over time
- Whether it tailors its initiatives to different life stages and changing needs

HW3 Life-Stage Benefits & Caregiving Responsibilities

Do benefits and wellbeing policies account for the different transitions and needs across a lifetime?

WHAT IT ASSESSES

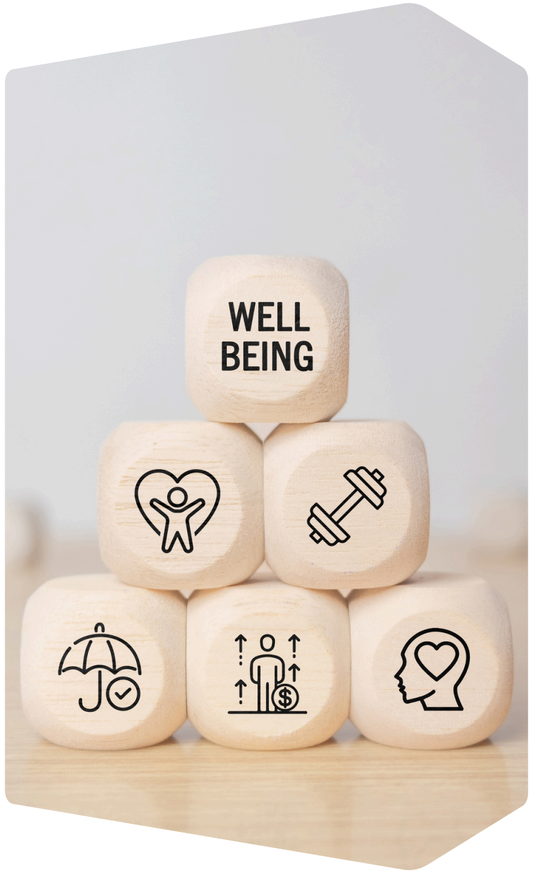
- Whether the organization recognizes that people's needs evolve over longer lives
- Whether it accounts for different life and career transitions
- Whether it supports caregiving responsibilities (children, parents, dependent relatives)

HW4 Wellbeing Design for Extended Careers

Is work designed to sustain productivity, employability, and wellbeing across extended careers?

WHAT IT ASSESSES

- Whether work is designed to sustain longer, more active, and productive careers
- How far the organization offers options to adapt roles, schedules, and ways of working
- Whether working conditions support performance across different life stages



Work, Careers *& Purpose*

Assesses whether the organization creates the conditions for people to build longer, more adaptable, and more meaningful careers. It looks at continuous learning, reskilling, flexibility, professional mobility, and the ability to respond to technological and demographic change. As lives get longer and work transforms faster, these capabilities are key to sustaining the employability, engagement, and value of a multigenerational workforce.

STRATEGIC WEIGHT
25%

WP1 Multi-Stage Career Design

Does the organization recognize that careers unfold in multiple stages, with structures that enable transitions, reinvention, mobility, and evolving roles over time?

WHAT IT ASSESSES

- Whether the organization has moved beyond the linear career model—entry, growth, retirement—toward more fluid paths
- How far formal structures support career transitions, including for employees 50+
- Whether employees in later career stages have real options to reinvent themselves within the organization

WP2 Continuous Learning & Reskilling

Does the organization promote continuous learning, skill adaptation, and readiness for technological and workplace change as an ongoing process throughout the whole career, regardless of age?

WHAT IT ASSESSES

- Whether the organization treats learning as a lifelong process rather than something concentrated in the early career
- How accessible reskilling and upskilling programs are to employees of all ages, including 50+
- Whether there's a skills strategy that accounts for the technological and demographic shifts underway

WP3 Flexible Career Paths

Does the organization enable flexible career paths that let people adjust intensity, roles, or responsibilities to fit their stage of life?

WHAT IT ASSESSES

- Whether formal mechanisms let people adapt how they work to their stage of life
- How far the organization offers real options between full-time work and full retirement
- Whether employees 50+ have access to work arrangements that let them keep contributing on sustainable terms

WP4 Purpose & Engagement

Does the organization create conditions for employees to keep a sense of purpose, contribution, and professional network as careers extend?

WHAT IT ASSESSES

- How far the organization recognizes that purpose and motivation evolve over a working life
- Whether there are opportunities for employees at different stages—especially later ones—to contribute meaningfully
- Whether accumulated experience is channeled into valuable roles (mentoring, projects, knowledge transfer)



Generational *Integration*

Assesses whether the organization actively promotes a culture that values age diversity, challenges age-related stereotypes, and creates real conditions for collaboration, mutual learning, and equal opportunity across generations. It also looks at whether the organization drives inclusive narratives, listening mechanisms, and spaces for interaction that tap into the range of perspectives, experiences, and capabilities in a multigenerational workforce. Amid demographic change, generational integration isn't just an inclusion policy—it's a condition for stronger innovation, learning, and organizational performance.

STRATEGIC WEIGHT
15%

GI 1 Age-Positive Culture

Is the organization actively working to build a culture that values people of all ages and reduces age bias in its practices, communications, and leadership?

WHAT IT ASSESSES

- Whether the organization treats ageism as a specific bias that affects its decisions and culture
- How far leadership, communication, and people management reflect a positive view of age and experience
- Whether there's consistency between what's said about age diversity and what's actually done

GI 2 Intergenerational Collaboration

Does the organization actively encourage collaboration among people from different generations?

WHAT IT ASSESSES

- Whether deliberate structures promote interaction and learning across generations
- How far generational diversity is treated as a strategic factor in teams and projects
- Whether intergenerational collaboration creates concrete organizational value

GI 3 Talent Strategies

Do talent attraction, development, and mobility strategies ensure equal opportunity for people of all ages, including the 50+ segment?

WHAT IT ASSESSES

- Whether talent processes are equitable across age groups
- How far the 50+ segment gets real development and mobility opportunities
- Whether mechanisms exist to spot and correct potential age bias

GI 4 Cross-Generational Learning & Knowledge Transfer

Does the organization have mechanisms to enable the exchange of knowledge, experience, and skills across generations?

WHAT IT ASSESSES

- Whether the organization treats the knowledge, experience, and skills across generations as strategic assets
- Whether mechanisms enable the exchange of knowledge, perspectives, and capabilities among people of different ages
- Whether learning flows in multiple directions, not only from more experienced employees to younger ones



Financial *Architecture*

Assesses how far the organization supports employees in building the financial capabilities, understanding, and decisions needed to sustain long lives. As life expectancy expands and traditional pension systems face growing limits, financial decisions are no longer linear—they call for more planning, adaptation, and resilience. Organizations can make a real difference by building financial capability, fostering understanding of this new context, and providing tools that help people make informed decisions and protect their financial security over time.

STRATEGIC WEIGHT
15%

LF 1 Financial Education

Does the organization build employees' financial capabilities, providing tools and knowledge they can apply at different career stages?

WHAT IT ASSESSES

- Whether the organization promotes the development of practical financial skills
- How far employees get knowledge they can use day to day (saving, budgeting, investing)
- Whether initiatives support different stages of working life

LF 2 Awareness of Longevity's Financial Challenges

Does the organization help employees understand how longer lives reshape financial planning and career paths?

WHAT IT ASSESSES

- Whether the organization fosters understanding of the impact of demographic change and longevity
- How well employees understand how the traditional rules of financial planning are changing
- Whether a long-term view is encouraged in personal decisions

LF 3 Financial Planning Support

Does the organization provide tools, resources, or guidance that help employees make informed long-term financial decisions?

WHAT IT ASSESSES

- Whether the organization makes tools or services available to support concrete financial decisions
- How far employees can evaluate financial scenarios over time
- Whether there are hands-on resources (beyond training)

LF 4 Financial Wellbeing & Resilience

Does the organization promote employees' financial wellbeing, strengthening their ability to maintain financial stability over time?

WHAT IT ASSESSES

- Whether the organization recognizes the impact of financial stress on wellbeing and productivity
- How far it promotes sustainable financial habits
- Whether it supports employees through major financial transitions



The Longevity *Dividend & Markets*

Assesses whether the organization sees demographic change as a strategic market opportunity and acts on it. As rising longevity drives one of the biggest demand shifts of the 21st century, the organizations that understand people's needs, capabilities, and aspirations across longer lives are best positioned to innovate, grow, and help build markets that support wellbeing and independence.

STRATEGIC WEIGHT
15%

LM1 Longevity-Driven Market Strategy

Does the organization recognize demographic change and new longevity as forces reshaping its markets, and build them into its business strategy?

WHAT IT ASSESSES

- Whether the organization identifies demographic change and greater longevity as forces reshaping demand, consumer behavior, and market opportunity
- How far strategic business analysis treats longevity as a transformative force, not just a residual segment
- Whether the market view recognizes the 50+ segment as a significant, diverse, and growing economic player

LM2 Product & Service Redesign

Does the organization design its products and services around the needs, capabilities, and preferences of people at different life stages?

WHAT IT ASSESSES

- Whether design processes explicitly account for the needs of people at different life stages
- How far accessibility—physical, digital, and communicational—is a built-in design criterion rather than an afterthought
- Whether the organization uses user-research methods that include the 50+ segment as a source of insight

LM3 Innovation Focused on the Longevity Dividend

Does the organization actively explore and develop innovation opportunities in response to demographic change—including new products, services, or business models?

WHAT IT ASSESSES

- Whether the organization treats demographic change as a driver of innovation
- How far an innovation strategy puts longevity at its core
- Whether it actively researches the needs and behaviors of the 50+ segment

LM4 Strategic Participation in Longevity

Does the organization take an active role in developing markets tied to demographic change, aligning its business strategy with creating economic and social value in a longer-lived world?

WHAT IT ASSESSES

- Whether the organization explicitly links its business strategy to the opportunities emerging from demographic change
- How far it takes an active role in building and developing longevity-related markets
- Whether there's alignment between the commercial value proposition and the real impact on people's lives over longer lifespans



Demographic *Governance*

Assesses whether the organization develops the leadership, analytical, and decision-making capabilities to understand, anticipate, and respond to the impact of demographic change. It looks at how far a demographic lens is built into strategy, talent planning, and the identification of future risks and opportunities. Amid longer lives, low birth rates, and fast technological change, the organizations that build future-ready leadership and turn data into actionable intelligence are best positioned to adapt and create sustainable value.

STRATEGIC WEIGHT
15%

DG 1 Demographic Awareness

Does the organization's leadership recognize demographic change as a structural trend that will affect its workforce, its markets, and its long-term sustainability?

WHAT IT ASSESSES

- Whether leadership understands demographic change as a structural transformation rather than a short-term or purely social phenomenon
- How far demographic shift and longevity are part of senior leadership's strategic conversations
- Whether there's a shared understanding within leadership of the demographic implications for the organization

DG 2 Strategic Integration

Does the organization build demographic change into its strategic thinking and decision-making?

WHAT IT ASSESSES

- Whether strategic planning explicitly factors demographic trends into analysis and decisions
- How far organizational policies reflect an understanding of what longer lives imply
- Whether there's a coordinated approach connecting the different dimensions of demographic change

DG 3 Internal Demographic Intelligence

Does the organization collect, analyze, and use demographic data on its workforce to identify future risks, opportunities, and needs?

WHAT IT ASSESSES

- Whether the organization collects relevant data on the makeup and evolution of its workforce
- Whether it uses demographic data to understand future trends, risks, and opportunities
- Whether the data informs talent planning, knowledge continuity, and decision-making

DG 4 Organizational Action & Mobilization

Does the organization have mechanisms to rally leaders, teams, and key stakeholders around the demographic-change agenda and turn it into concrete action?

WHAT IT ASSESSES

- Whether the organization turns its understanding of demographic change into concrete initiatives
- Whether there are owners, advocates, or champions driving the agenda internally
- Whether there are spaces to share knowledge, spark conversations, and drive action



What the *organization receives*



At the end of the process, the organization gets a set of actionable results to understand where it stands and prioritize its plan.

01 Overall Score
Overall level of readiness for demographic change.

02 Score by Dimension
Specific results for each of the six areas assessed.

03 Benchmark
Comparison with participating organizations of a similar profile.

04 Executive Report
Analysis of strengths and priority opportunities.

05 Prioritized Recommendations
Suggested actions to accelerate organizational readiness.

06 Impact Review
A tool to track progress and evolution over time.

More than an assessment

The Shift is a demographic-intelligence platform that helps organizations understand, measure, and respond to the impact of demographic change. *The Shift 360 Assessment* is the gateway to an ecosystem that brings together:

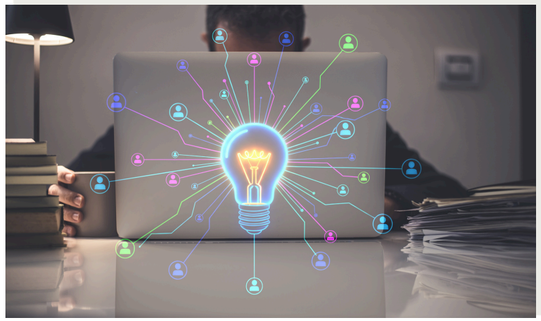
01 Intelligence
Research, trends, and data on longevity, work, consumption, and demographic change.

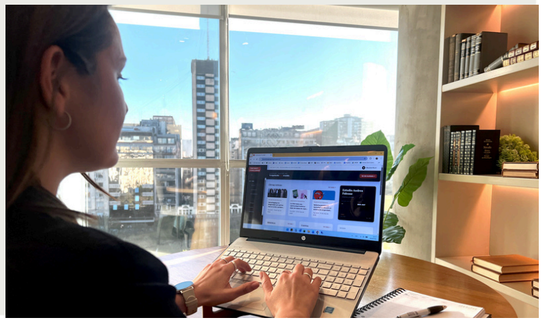
02 Benchmarking
Comparison with similar organizations to spot strengths, gaps, and opportunities.

03 Community
Leaders, organizations, and voices driving this agenda across the region.

04 Learning
Webinars, working sessions, events, and exclusive content.

05 Solutions
Cases, tools, and best practices to turn diagnosis into action.





YOUR PARTICIPATION INCLUDES

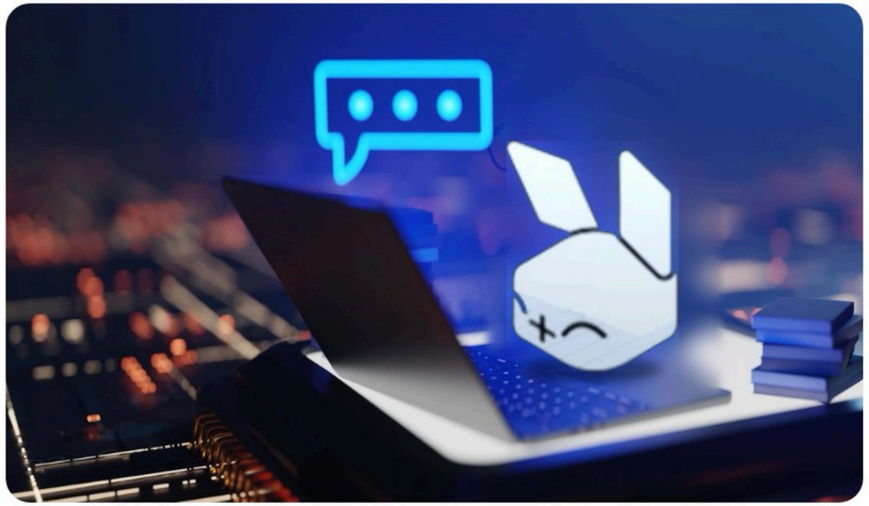
The Shift *Membership*

- ✓ The Shift Briefing · monthly strategic intelligence
- ✓ Exclusive research and reports
- ✓ Webinars, working sessions, and community events
- ✓ Priority access to training programs
- ✓ Networking with leading organizations across the region

INCLUDED · SILVER 50+ SEAL

An assessment to support **marketing** teams in the silver economy—to better understand, connect with, and serve the 50+ segment and its opportunities.

The assessment is the beginning. *The transformation* comes next.



MEET SHIFTY

Shifty, your copilot for navigating demographic change.

Throughout the process, you'll have **Shifty** by your side—The Shift's AI assistant. Trained on The Shift 360's framework, standards and best practices, organizational cases, global research, and the assessment content.

FROM MEASURING TO ACTING

Assessment → Benchmark → Intelligence → Community → **Action**

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