



**FACILITATING THE RETENTION AND/OR RE-ENTRY OF
MATURE WORKERS IN THE WORKPLACE:
A Mature Worker Study**

**Submitted To
Alberta Employment and Immigration**

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Executive Summary

Current demographic and employment trends have highlighted the need to consider older workers as a crucial component of the workforce. In the fall of 2008, Bow Valley College partnered with Alberta Employment and Immigration to engage in a study that would address both barriers and facilitators to rehiring or retaining 50 plus workers. A Steering Committee representing different employment sectors guided the project. The findings and recommendations identify practices that will retain mature workers in meaningful employment and facilitate a more diverse workforce that would better meet the needs of employers and workers. The intent of this project was to answer seven key objectives:

- a) To identify and describe best practices in the attraction and retention of mature workers;
- b) To gain an understanding of the kinds of information or services mature workers require to successfully transition to a different work mode;
- c) To identify and describe what adaptations employers need and/or are willing to make;
- d) To identify barriers that exist on the wider system that prevent successful integration of mature workers into the system;
- e) To identify the systems and products which are already in place at Bow Valley College and with employers that can be adapted to better serve mature workers;
- f) To identify the adaptations required to existing college programs to be made to attract mature students; and
- g) To outline what new services/programs could be established by the College to assist in the attraction and retention of mature workers in the work force.

The study involved data collection from a range of sources, including an extensive literature review, input from key stakeholders representing different employment sectors, focus groups, and survey data from employers, employees and job seekers. Interviews with career counselors and college personnel were included in the study to gain a deeper understanding of the need for and availability of support and training for mature workers and employers.

The key findings and recommendations of the study validate the best practices described in the literature in terms of what both employees and employers see as key strategies and practices, including:

- **Flexible work arrangements:** This includes offering part-time hours, contract-based work assignments, job sharing, or establishing varying work schedules with individual employees. In reality, implementing this may prove to be more difficult. As discussed in focus groups and follow-up interviews, employers may or may not be able to accommodate for an individual worker's needs, depending on the size and structure of the organization.

- **Restructuring the work environment:** This could include adaptations such as different size of computer monitors, but generally this involves paying greater attention to ergonomic and wellness issues that would benefit all employees.
- **Restructuring the job:** This involves providing opportunity, encouragement and possibly training for older workers to consider staying in their workplace, but undertaking different responsibilities, such as transitioning into new roles. A prime example of this is in the health sector, where nursing staff may move away from direct patient care to less physically demanding roles such as administrative or training positions.
- **Adapting policies regarding benefits:** This is a complex area discussed in detail in the study as policies and practices regarding pensions and benefits can be either a barrier or an incentive to recruitment and retention of mature workers.
- **Training & education:** A broad range of training was seen as an integral part of strategies to recruit/retain mature workers. The topics range from skills based training related to technology to soft skills such as teamwork in a multigenerational multicultural environment. Of note was the need for training for many mature workers on how to “market” themselves to an employer.
- **Targeted training:** While the key components of most training will be similar regardless of the demographics of the learners, our study indicates that training adapted to the needs of mature or 50 plus workers is important. For example, job finding skills (resume writing, interview skills, etc.) were highlighted as an area that should undergo adaptation for mature workers.
- **Recruitment strategies:** The literature highlighted the importance of purposefully including messaging in recruitment that speaks to the older worker; focus group data supported this finding.

The findings from the study will be posted on the Bow Valley College website to ensure availability to employers, post secondary institutions, and human resource organizations across Alberta who may wish to access this information. In addition, the college will disseminate this report to employers engaged in the study as well as others who may request it. Additionally, Bow Valley College, with the support of the Steering Committee, is pursuing further funding options to develop a Toolkit for assisting mature workers to stay in the workforce, either with their current employers or pursue different employment. The proposed toolkit can be used by career coaches, employers, and mature workers to enhance their understanding and skills that will increase their chances of gaining and staying in meaningful employment.

I. INTRODUCTION

The Mature Worker Study is an exploratory study to better understand the needs of employers and mature workers, as well as strategies that would enable 50 plus workers to maintain an attachment to the workforce¹. The study has also examined the viability of colleges implementing training programs or other services to facilitate the retention and/or re-entry and integration of 50 plus workers in the workforce. The study was conducted by Bow Valley College in partnership with Alberta Employment and Immigration.

II. BACKGROUND

There is a growing awareness in Canada and the U.S. of the challenges and opportunities that have resulted from declining birth rates, longer life expectancy, and the increasing number of people who are retiring. The potential shortage of workers arising from these demographic factors means that there is a need and an opportunity to engage 50 plus workers in the workforce².

Currently almost half of Alberta's working age population is over the age of 40, and the aging of the province's population is expected to continue over the next couple of decades³, and fewer young Albertans are available to replace these workers⁴. On a national level, the Canadian government estimates that 41% of Canada's working population will be between the ages of 45 to 64 by 2011, compared to only 29% of working Canadians who were in this demographic in 1991⁵.

The current economic downturn has had a significant impact on the workforce. The current higher unemployment rates may diminish the sense of urgency to hire or retain older workers; however, over the long term there will be a need to retain 50 plus workers. According to The Calgary Herald, older workers are the demographic companies will "need to tap into the most in coming months and years"⁶.

Perceptions are changing about retirement. 50 plus workers are looking for ways to remain active and involved in both employment and their community past the traditional retirement age⁷. A study

¹ Terminology referring to this population varies in literature. Terms such as "mature workers", "older workers", "50 plus", and "plus 50", are often used interchangeably. To remain consistent, this population will herein be referred to as 50 plus workers in this study.

² Alberta Employment and Immigration (2009). *Alberta's Aging Labour Force and Skill Shortages*. Retrieved on May 4, 2009 from http://employment.alberta.ca/documents/LMI/LMI-SSA_aging-and-shortages.pdf

³ Alberta Employment and Immigration (2008). *Mature Workers in Alberta and British Columbia: Understanding the Issues and Opportunities*. Retrieved on May 4, 2009 from http://employment.alberta.ca/documents/RRM/PC_mature_workers.pdf

⁴ Alberta Employment and Immigration (2009). *Alberta's Aging Labour Force and Skill Shortages*. Retrieved on May 4, 2009 from http://employment.alberta.ca/documents/LMI/LMI-SSA_aging-and-shortages.pdf

⁵ Human Resources and Skills Development Canada (2002). *Challenges of an Aging Workforce*.

⁶ Sankey, D. (2009, July 4). Labour Market Seen Stabilizing. *The Calgary Herald*. Retrieved on October 6, 2009 from <http://www.calgaryherald.com/Labour+market+seen+stabilizing/1760455/story.html>

⁷ Alberta Employment and Immigration (2008). *Mature Workers in Alberta and British Columbia: Understanding the Issues and Opportunities*. Retrieved on May 4, 2009 from http://employment.alberta.ca/documents/RRM/PC_mature_workers.pdf

by Statistics Canada found that 60% of retired workers would have preferred to continue working if their circumstances had been different, such as having the option to work fewer hours or having improved pension arrangements⁸. Furthermore, there is “growing evidence that workers no longer view retirement as a fixed point in time, but see it as a gradual period of transition from working full time with their existing employer to exploring other employment arrangements and options”⁹.

In light of this demographic and labour force analysis, it is vital to gain a better understanding of how employers and educational institutions can address the barriers to meaningful employment faced by 50 plus workers, and the challenges that employers face in recruiting and retaining this population in their workforce.

III. KEY QUESTIONS & OBJECTIVES

The intent of this project was to answer seven key objectives:

- a) To identify and describe best practices in the attraction and retention of mature workers in various sectors.
- b) To gain an understanding of the kinds of information or services mature workers require to successfully transition to a different work mode in a different sector.
- c) To identify and describe what adaptations employers need and/or are willing to make to employ mature workers.
- d) To identify barriers that exist on the wider system that prevent successful integration of mature workers into the system.
- e) To identify the systems and products which are already in place at Bow Valley College and with employers that can be adapted to better serve mature workers.
- f) To identify the adaptations required to existing college programs to be made to attract mature students.
- g) To outline what new services/programs could be established by the College to assist in the attraction and retention of mature workers in the work force.

⁸ Statistics Canada (2005). *You Can't Always Get What You Want: Retirement Preferences and Experience*. Retrieved on May 4, 2009 from <http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?catno=11-008-X20040037731&lang=eng>

⁹ Conference Board of Canada (2008). *Harnessing the Power: Recruiting, Engaging, and Retaining Mature Workers*. Retrieved May 8, 2009 from <http://www.conferenceboard.ca/documents.aspx?did=2745>

IV. METHODS

This study used a variety of methods to gather information, including: input from key stakeholders; an extensive literature review; survey data; focus group data; and interviews. This combination of methods allowed a comprehensive analysis of both the challenges in the current employment sector as well as recommendations for workplaces and colleges.

1. Input from Key Informants (Appendix A)

In the earliest stages of the project, a Steering Committee was recruited to guide the project, provide feedback on the findings of the literature review and assist with many aspects of project implementation. The Steering Committee included three key stakeholder employers and two deans employed at Bow Valley College:

- Mr. Darrell Lang, VP, Human Resources & Organization Development at Bethany Care Society
- Mr. Bernie Sheehan, Director, Human Resources at Bow Valley College
- Ms. Rayna Weatherald, Director, Human Resources at the Marriott Hotel
- Ms. Elza Bruk, Dean, Department of Business and Industry at Bow Valley College
- Dr. Rena Shimoni, Dean, Office of Applied Research at Bow Valley College

Other key informants were identified for advice and information as needed as the project progressed.

2. Review of the Literature for Best Practices

Best practices for the retention and recruitment of 50 plus workers, for the purpose of this project, refer to the practices implemented by organizations that “expand employment opportunities for 50 plus workers, address their particular needs and interests, and generally make work more rewarding”¹⁰. In this study best practices were identified from a review of documents from studies conducted primarily in Canada and the U.S. (see attached list of references). Common themes of best or promising practices were identified and described and used as a framework for data analysis.

3. Data Collection

Surveys were developed and distributed to employers, employees and job seekers. Interviews were conducted with representatives from the Steering Committee. These interviews informed the development of the employer questionnaire, which was distributed to employers in different sectors to ensure broad representation. Focus groups were conducted with representatives from organizations in Calgary often the HR or senior representatives. The purpose of these interviews and focus groups was to gain an understanding of the challenges faced by both employers and

¹⁰ American Association of Retired Persons (2004). *Staying Ahead of the Curve 2004: Employer Best Practices for Mature Workers*. Retrieved April 4, 2009, from http://assets.aarp.org/rgcenter/econ/multiwork_2004.pdf.

employees regarding 50 plus workers, best or positive practices that are currently being implemented, and recommendations for training. Selected representatives from post-secondary institutions that currently include a focus on plus 50 learners were also interviewed. This served as an indication of the kinds of programs already in practice, and how these programs can be adapted or improved upon to meet the needs of 50 plus workers. Finally, career coaches at job resource centres were interviewed to gain insight into their programs and their views on the challenges 50 plus workers face in obtaining meaningful employment.

The table below summarizes the research methods, their purpose, the sample selection method and the strategies used for implementation and collection of data.

Table 1: Summary of Research Tools, Selection Methods and Data Collection Strategies

Research Tools	Purpose	Selection Method	Data Collection
I. Surveys			
Employers N= 18 Response Rate: 23%	<ul style="list-style-type: none"> Demographic distribution of 50 plus workers Level of concern over retirement Policies and procedures for retention and recruitment 	<ul style="list-style-type: none"> Purposeful selection of employers to ensure representation of sectors 	<ul style="list-style-type: none"> Hard copies and online questionnaires were distributed to 74 employers (www.surveymonkey.com) Interviews were conducted with the three employer stakeholders
Employees N=383 Response Rate: 45% (Appendix C)	<ul style="list-style-type: none"> Future work/ retirement plans Training needs 	<ul style="list-style-type: none"> All above employers invited to distribute anonymous questionnaires 7 of above employers distributed questionnaires 	<ul style="list-style-type: none"> Choice of hard copy questionnaires or Survey Monkey questionnaires were distributed by 7 employers to approximately 850 employees in the 50 plus age group
Job Seekers N=57¹¹ (Appendix D)	<ul style="list-style-type: none"> Employment plans/expectations Attitude employers have towards 50 plus workers Personal perceived training needs 	<ul style="list-style-type: none"> Distributed to three employment centres 	<ul style="list-style-type: none"> Hard-copies of the Questionnaire for Job Seekers were provided to three Career and Employment Centres Career coaches were asked to identify 50 plus clients and ask them if they would voluntarily complete the confidential questionnaire

¹¹ **NOTE:** The Response Rate for this data was not calculated. The distribution of questionnaires was implemented by career coaches at select locations based on their discretion and judgement as to which clients would be willing to participate.

Table 1 Continued

Research Tools	Purpose	Selection Method	Data Collection
II. Focus Groups			
Employer Focus Groups (Appendix E)	<ul style="list-style-type: none"> • Gather information about employer views on 50 plus workers • Gain a deeper understanding of training and support needs as well as perceived barriers 	<ul style="list-style-type: none"> • Respondents of employer survey who indicated they would participate in focus group • Email invitation to 1150 employers registered with Bow Valley College's employment services 	<ul style="list-style-type: none"> • In total 32 participants from 28 Calgary employers participated in one of three focus group sessions facilitated by a moderator and recorded by a recorder
III. Interviews			
External Stakeholders (Appendix F)	<ul style="list-style-type: none"> • Discuss external barriers to employing 50 plus workers 	<ul style="list-style-type: none"> • Employers who agreed to be key stakeholders were interviewed 	<ul style="list-style-type: none"> • 3 Key Stakeholders were interviewed
Post-Secondary Institutions (Appendix G)	<ul style="list-style-type: none"> • Indication of kinds of programs in practice as well as how these programs can be adapted/improved to meet the needs of 50 plus workers 	<ul style="list-style-type: none"> • Based on a document and website review of institutions offering 50 plus programming, institutions were selected to gain the most geographically representative and diverse set of practices 	<ul style="list-style-type: none"> • Ten continuing education departments in post-secondary institutions in Canada and the United States offering 50 plus programming were interviewed
Career Coaches (Appendix H)	<ul style="list-style-type: none"> • Gain insight into programs in place for 50 plus workers • Discuss views on challenges 50 plus workers face in obtaining meaningful employment 	<ul style="list-style-type: none"> • Interviews conducted with local career counsellors (Calgary) through purposeful sampling methods 	<ul style="list-style-type: none"> • Supervisors at two career/employment services, one offered through BVC and one operating through a community agency

4. Ethics Review

An application for ethics review was submitted to the Ethics Review Board at Bow Valley College in February as per Bow Valley College's policy on Research Involving Human Subjects. Approval was granted on February 26, 2009.

5. Data Analysis

The data was analyzed using a framework of key themes. These were validated through discussions with key informants. Surveys and focus group questions were derived from the key themes.

The key findings from the focus groups were analyzed and coded using "NVivo 8", a qualitative software program. In addition, the qualitative data was triangulated through the key researcher and two research assistants and was presented to the Steering Committee members for validation.

A comparative analysis was used, comparing the key findings that emerged from the data collected with the key themes from the literature and interviews with the key stakeholders.

V. KEY FINDINGS

The key findings section outlines the respondent profiles from each of the populations in this study, the barriers to retaining and rehiring 50 plus workers, an analysis of best practices organized according to categories established in the literature review, and an analysis of training and education programs.

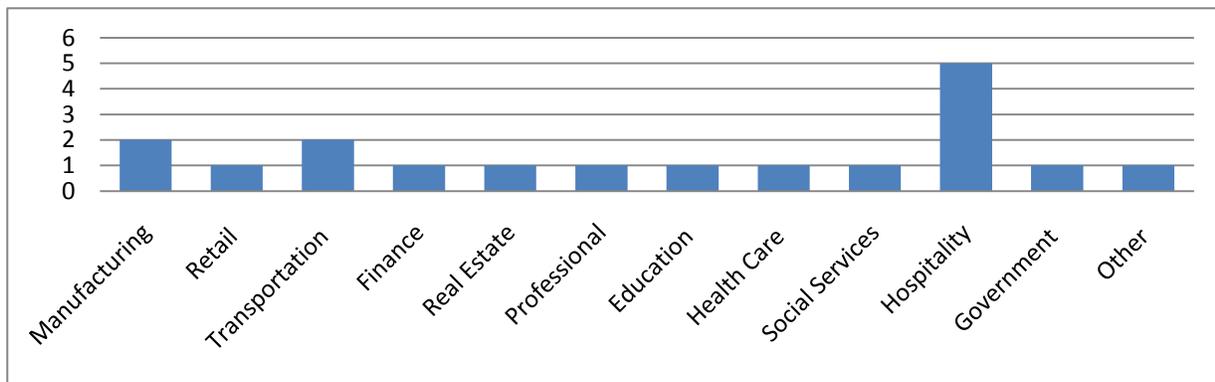
A. Respondent Profiles

The section below describes the different groups represented in the study.

1. Employers

The 18 employers who participated in the employer survey and interviews represented a number of industries/sectors, with the highest proportion coming from the hospitality industry. Graphs below indicate the breakdown in terms of sectors, number of employees in each organization, and the proportion of 50 plus employees within each organization.

Graph 1: Sectors Represented by Employer Survey Participants (N=18)

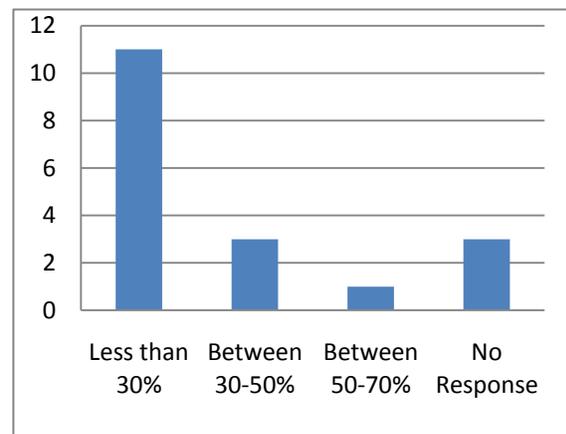


Of the participating employers, four indicated that the 50 plus age group represented more than 30% of their workforce. Eleven indicated less than 30% of their employees were within the 50 plus age group.

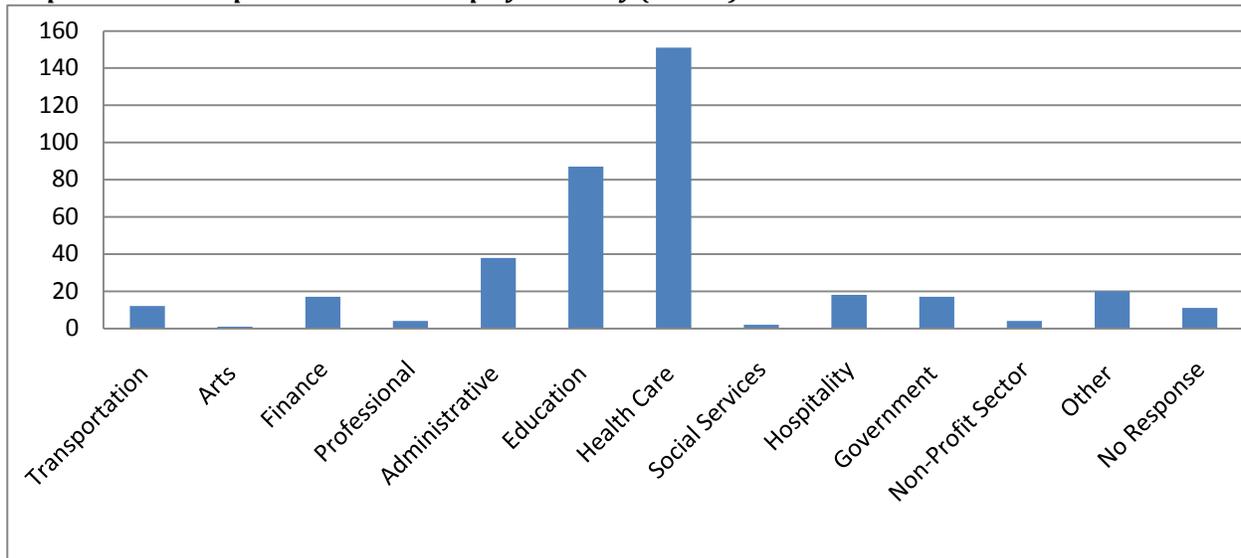
The size of employers surveyed varied:

- Two organizations employed less than 50 employees;
- Two employed 50-99 employees;
- Two employed 100-199 employees;
- Three employed 200-299 employees; and
- Nine employed 300 or more employees.

Graph 2: Proportion of 50 Plus Workers Employed by Participating Employers (N=18)



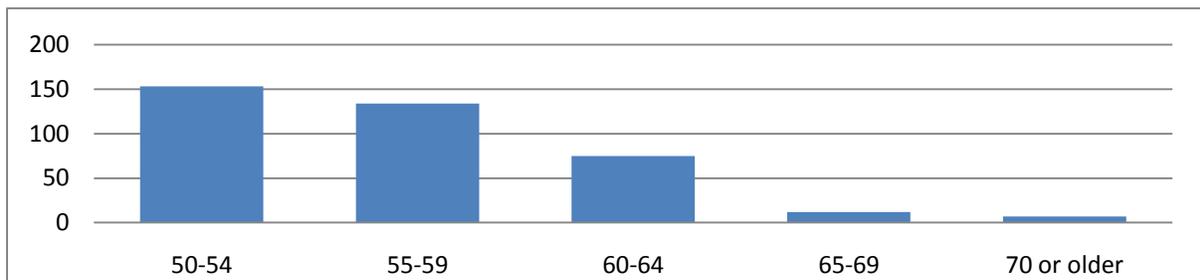
Graph 3: Sectors Represented in the Employee Survey (N=384)



There were significantly more females represented than males, with females representing 81% of survey responses (N=310) and males representing the remaining 19% (N=74). This is likely due to the high representation from the health and education sectors.

The age breakdown of 50 plus employees is listed in a graph below, which indicates the greatest number of 50 plus workers being between the ages of 50 to 59. It is interesting to note that there were still twelve employees over the age of sixty-five, and seven over the age of seventy.

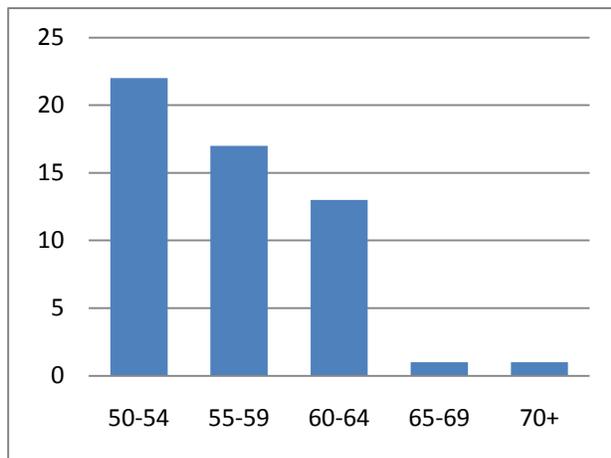
Graph 4: Age Breakdown of Employee Survey Participants (N=384)



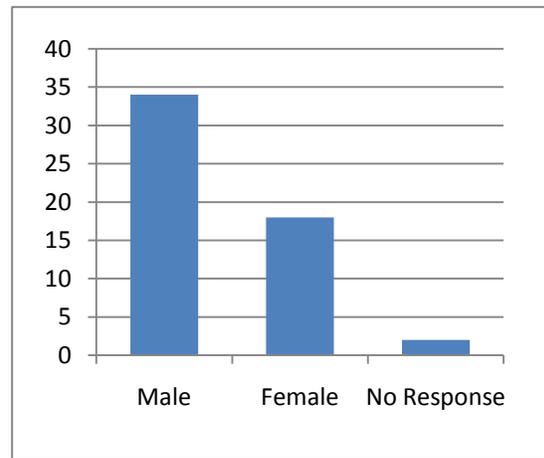
2. Job Seekers

Fifty-four job seekers participated in this study. There were almost double the males than females. The most represented age group, as listed in a graph below, was the 50-59 range. Other demographic information is listed below.

Graph 5: Age of 50 Plus Job Seekers Who Participated in Job Seeker Survey (N=54)

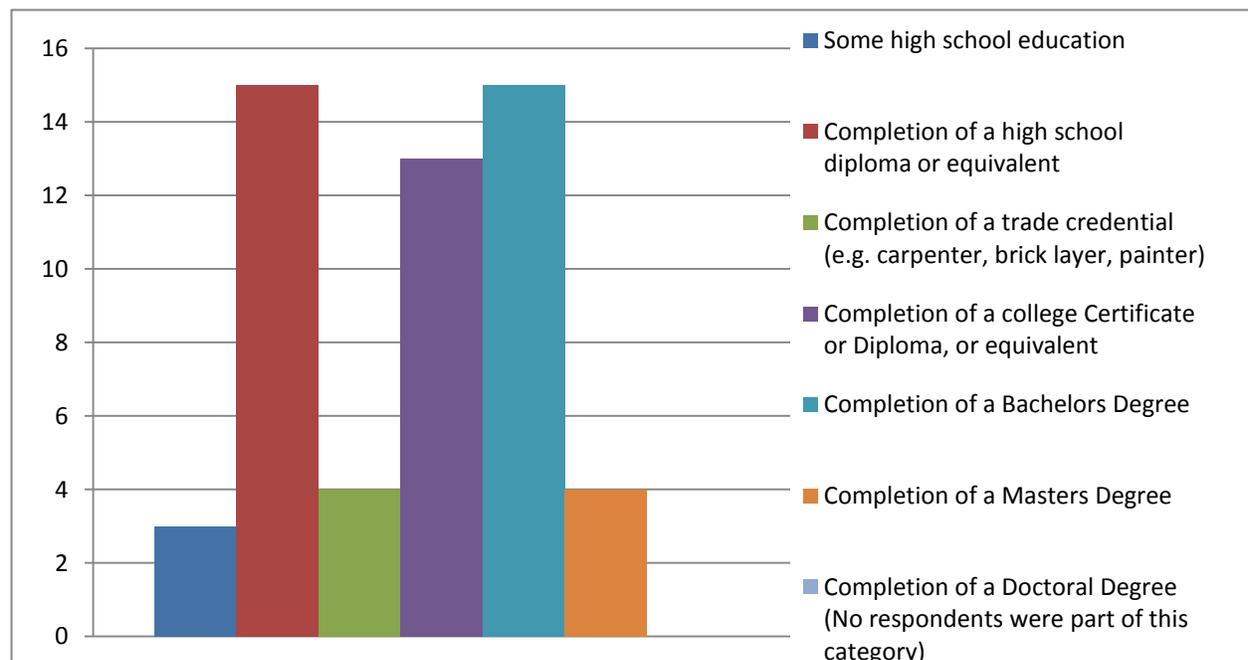


Graph 6: Gender of 50 Plus Job Seekers Who Participated in Survey (N=54)



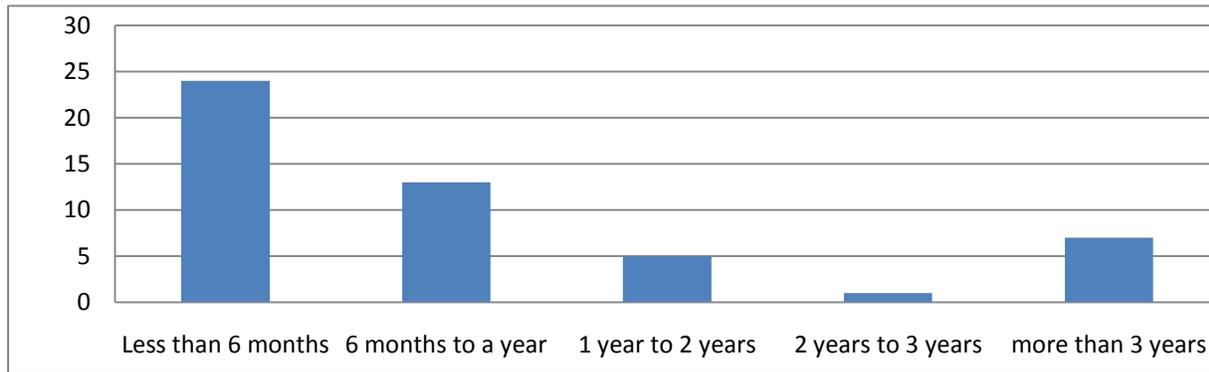
The job seekers surveyed generally had completed some post-secondary education (67%) as indicated in the chart below. Only 3 respondents (5%) indicated that they had less than a high school diploma.

Graph 7: Level of Education of 50 Plus Job Seekers Survey Participants (N=54)



The majority of the 50 job seekers who responded to the question, “How long have you been out of the workplace?” indicated they had been out of the work place for less than one year. A possible reason for this could be related to the economic climate of the time of the survey, which was conducted between April and June 2009.

Graph 8: Length of Time 50 Plus Job Seeker Survey Participants Have Been Out of Work (N=50)



B. Potential Barriers for 50 Plus Workers

Barriers to rehiring and retaining 50 plus workers exist both internally, within organizations and the workers themselves, and as a result of wider systemic barriers. Some barriers to full participation in the workforce for older workers have been identified in a report produced by the U.S. Department of Labour (USDL) Taskforce on the Aging of the American Workforce. Some examples of these include technological and organizational changes, limited access to training, age discrimination, physical limitations, and limited opportunities for customized employment¹². Barriers were most readily identified in this study in the focus groups. Following the focus groups, interviews were conducted with key stakeholders and career counselors to gain a deeper understanding of the barriers. These barriers are described below.

1. Health-Related Issues

While more and more older people are living healthy lifestyles, and are in good physical and mental shape, aging does take its toll. As people age there is often a decline in vision and hearing, and an increase in conditions such as arthritis, that can affect one’s ability to continue working in certain roles or that could affect productivity occur.

“The work... can be physically and emotionally challenging... a lot of our mature workers simply do not want to do that type of work anymore.”

- Comment from Employer Focus Group

¹² U.S. Department of Labor (2008). *Report of the Taskforce on the Aging of the American Workforce*. Retrieved December 17, 2008, from <http://www.aging.senate.gov/letters/agingworkforcetaskforcereport.pdf>

2. Computing and Communication Technology

“Technology is a barrier as it is constantly changing and at a quicker pace”.

- Comment from Employer Focus Group

Technology and organizational change were recognized as barriers in all three employer focus groups. Many of today’s 50 plus workers use computer technology in a much more limited way than their younger peers. The biggest concern was not that 50 plus workers are not capable of learning new technologies required for today’s workforce. Rather, it is that either the employers or the employees may not see new training as a worthwhile “investment”. An employer mentioned in a focus group that “mature workers may not want to learn new technology if [he or she] is retiring in five years”.

3. Financial Implications:

From an employer’s perspective, retaining 50 plus workers can be more expensive than hiring younger, less experienced employees, depending on the organization. Although it came up in employer focus groups, this theme was not evident in survey data nor was it prevalent in a review of the literature.

“Due to experience, mature workers can be costly... they are a higher income category. Even if it is possible that the employee would take a lower salary, we are unable to offer it because of... company regulations”.

- Comment from Employer Focus Group

4. Intergenerational Differences

Older generations often have a significantly different way of looking at work and communication, both in terms of value and in terms of practice. For example, as mentioned in a focus group, 50 plus workers “have a different way of looking at work [and] may not understand that it is acceptable to wear certain clothing to work now, or that being five minutes late is not a big deal”. (The reverse of this statement is that younger workers may not understand that professional conduct relating to dress code and punctuality are still important in a workplace).

In addition to organizational changes, different generations communicate differently. For example, a focus group participant mentioned that younger workers tend to use technological means such as Google to answer questions or get information, but 50 plus workers tend to often check with other staff. New ways of communicating, such as text messaging, Skype, email, and online social networking, are often underutilized by older workers, and can contribute to a generational breakdown in communication.

“There are very different communication styles between the generations, which lead to tension”.

- Comment from Employer Focus Group

5. Attitude of Employers and Staff

“Despite employers saying that they value knowledge...the perception that “Experience Counts” does not always connect with reality”.

- Comment from Employer Focus Group

A common barrier cited in the literature is “ageism”, such as using ageist language¹³. Ageism is defined as the “process of systematic stereotyping of and discrimination against people because they are old”¹⁴. Data from this study did not support the assumption that negative stereotypes about older people is a barrier; however, attitudes held by employers, staff, and the 50 plus worker were referred to frequently in study findings as barriers to retaining or rehiring 50 plus workers.

Attitudes can be one of the most significant barriers to recruiting and retaining 50 plus workers in meaningful employment. The crux of the attitudinal barrier may lie within the employer, who may have stereotypical and/or incorrect assumptions about older workers, or it may lie within the 50 plus workers, who may be judgmental or inflexible about accepting the norms of younger peers and supervisors, or who may have trouble envisioning themselves in different roles.

Even if an organization has progressive policies in place to support 50 plus workers, such as access to training or rehiring policies, the people actually responsible for enacting these policies may hold certain biases or misconceptions against the 50 plus worker. An example discussed in an employer interview was the attitude of supervisors, who may either have a “fear of change” or a fear of disruption to normal working practices due to needing to accommodate 50 plus workers (such as providing a flexible schedule or modifying job descriptions).

The next section discusses that many best practices do relate to adaptations of the work site to accommodate older workers. An attitudinal barrier that arises with adapting the workplace is that any “special arrangements” could be deemed unfair by other employees.

“Younger workers see the changes to mature workers’ jobs due to physical limitations as unfair. They wonder why they have to work harder because they are more physically capable”.

- Comment from Employer Focus Group

6. External/System-Wide Barriers: Pension & Benefits Plans

A barrier that was mentioned frequently in focus groups, employer and career counsellor interviews was that workers are cut off from pensions and health benefits after a certain age, commonly 60 or 65. An employer indicated that benefits providers often cite diminishing health as a reason for not providing benefits, claiming that it would be too costly to provide benefits for older workers. Additionally, most employers mentioned that they only provide benefits to full-time staff, whereas many plus 50 workers are more interested in working part-time.

¹³McCann, B. (2008, April 14). *When Words Get Old: Ageist Language Undercuts Workers, Companies*. University of Southern California Marshall School of Business. Retrieved October 29, 2009 from <http://www.marshall.usc.edu/news/all-articles/when-words-get.html>.

¹⁴ Cohen, E. (2001). The complex nature of ageism: What is it? Who does it? Who perceives it? *Gerontologist*, 41(5), 576-7.

“Some life insurance and other benefit stop at age 65 or are reduced. This is not fair”.

- Comment from Employer Focus Group

“There are no similar benefits for mature workers in regards to paid leave, as there are for younger workers. Mature workers face different problems, such as caring for aging parents however, do not receive the same type of support, such as the support younger workers receive for maternity leave”.

- Comment from Employer Focus Group

A barrier discussed in focus groups and employer interviews was the current Canada Pension Plan (CPP) legislation that requires employees to interrupt employment or work significantly reduced hours in order to claim CPP between the ages 60-65. Once employees turn 65 they become eligible to collect CPP without this restriction.

“We just had a secretary go on leave for six weeks with no income so she could claim CPP”.

- Comment from Employer Focus Group

Although currently problematic for many 50 plus workers, the Government of Canada is working on changes to address some of the institutional barriers to retaining 50 plus workers, specifically in regards to the Canada Pension Plan. A recent government news release highlighted a number of proposed changes to the CPP, including: increased flexibility to combine pension and work; voluntary participation past age 65; and phased retirement. One finance minister was quoted saying, “A modern pension plan should treat workers fairly regardless of the age they take their retirement pension... [It] should recognize the need for some flexibility”¹⁵. Current proposed changes to the CPP are outlined in more detail in the appendix.

While the barriers mentioned were supported by the findings in literature, the findings in the study of best practices addressed many of these barriers. Employers are beginning to strategize and implement ways in which these can be dealt with to facilitate the re-entry or retainment of 50 plus workers in their organization. The following section outlines examples from literature and data collected in this study that support best practices for retaining or rehiring 50 plus workers.

C. Best Practices

The key findings of this report were categorized based on 6 key recommendations that emerged from the literature¹⁶. These are:

1. Providing Flexible Work Arrangements and Schedules
2. Adapting the Work Site & Re-structuring the Job Assignment
3. Creating a Culture of Generational Inclusion

¹⁵ Department of Finance Canada (2009, May 25). *Finance Ministers Indicate Canada Pension Plan Is Financially Sound*. Retrieved on September 1, 2009 from www.fin.gc.ca/n08/09-051-eng.asp

¹⁶ American Association of Retired Persons (2008). *Staying Ahead of the Curve 2007: The AARP Work and Career Study*. Retrieved February 4, 2009 from http://assets.aarp.org/rgcenter/econ/work_career_08.pdf

4. Changing Employment/Pension Policies and Health Care Benefits
5. Targeting 50 Plus Workers in Recruitment
6. Addressing Training Needs and Opportunities

1. Providing Flexible Work Arrangements and Schedules

“Providing mature workers with alternative work arrangements such as flexible hours, working from home, and condensed work week [is very important]... giving them more options depending on the lifestyle workers want to have. Employers should try to accommodate all workers, but these types of flexible arrangements especially help the mature workers”.

- Comment from Employer Focus Group

Flex time scheduling is perceived as being important to 50 plus workers who may need to adjust or reduce their time in the workplace to provide care for a family member, have more time to travel, and yet remain active in the workplace. Flexible work arrangements might include:

- Informal flex time where an employee can adjust his/her work schedule as the need arises;
- Formally establishing a work schedule with reduced hours through job sharing;
- Formally moving to part time status with a work schedule or working reduced hours;
- Working casually as work is available or doing short term assignments; and/or
- Telecommuting¹⁷.

Many employers have implemented policies and practices to facilitate flexibility. Below are some examples of flexibility as a best practice in the workplace include Enbridge’s Phased Retirement Policy, the City of Calgary’s Retiree Exempt Employment Pool, Bow Valley College’s Retiring and Rehiring Policy, and Bethany Care Society’s Phased Retirement and Flexibility in Scheduling Policy.

Enbridge provides phased retirement options whereby work arrangements can fall between full time retirement and full time work. They offer flexible work arrangements such as “variable work hours, compressed work week, and regular part time”¹⁸.

The City of Calgary maintains contact with retired employees who can be hired on a short term or contractual basis to cover for employees or complete projects. It has also implemented what it refers to as a Retiree Exempt Employment Pool (REEP) for employees interested in filling limited term assignments such as “vacation coverage, relief, backfilling, etc. without a... competitive process. The compensation for a REEP hire is based on the normal salary for the position”¹⁹. The City of Calgary has also implemented a rehirement policy that “allows managers to offer to

¹⁸ Campbell, L. (2007). *Attracting and Retaining Experienced Workers* [Enbridge Presentation Slides]. Retrieved May 4, 2009 from http://www.business.ede.org/categorydocuments/Business_4/Lori%20Campbell.pdf

¹⁹ City of Calgary (2008). *Rehirement Policy Guidelines*. Retrieved December 17, 2008 from http://www.calgaryeconomicdevelopment.com/files/CalgaryWorks/June%20presentations/Britt_Wilson_City_of_Calgary.pdf

immediately rehire a retiring employee, on a limited-term basis, to fulfill a specific set of duties”, such as completing a project or facilitating knowledge transfer²⁰. Such employment contracts are for a limited time and can provide the employee with a salary up to the value of their salary at retirement.

Bow Valley College has a policy in place that addresses hiring procedures for retiring and rehiring of employees. The Retiring and Rehiring policy accommodates the re-employment of College retirees when it is determined that re-employing such retirees can help the College achieve quality and value objectives in serving learners. When the decision to rehire a retiree is made, there is a maximum of two years length of employment at a compensation that is in accordance with the employee’s current placement²¹.

Bethany Care Society was the recipient of the 2009 Best Employers for 50 Plus Canadians Awards for “recruitment, retention and flexible workplace practices”²². Bethany has systematically overhauled programs to focus more on the needs of current and potential 50-plus workers, now more than a third of its workforce. One innovative example is flexible matching benefits programs that allow employees to invest employer contributions in retirement savings plans or cash them in. Full benefits are offered to part-time employees, and most benefits are extended beyond age 65. Bethany Care Society was also again selected for the Alberta’s Top 40 Employers for 2009 based on many aspects of the organization’s benefits programs including: promotion of work/life balance, three weeks vacation for new employees, phased retirement options, flexible RRSP programs and work environment²³.

Surveys, interviews, and focus group findings from this study all indicated the importance of flexibility. Over 70% of employees and job seekers surveyed indicated that having a flexible work schedule or the option of working part time is one of the most important attributes of working for an organization. The following table describes some of the findings surrounding flexibility in the workforce.

²⁰ City of Calgary (2008). *Rehirement Policy Guidelines*. Retrieved December 17, 2008 from http://www.calgaryeconomicdevelopment.com/files/CalgaryWorks/June%20presentations/Britt_Wilson_City_of_Calgary.pdf

²¹ Bow Valley College Human Resources (2008 January). Policy HR-12: Retiring and Rehiring Policy. Retrieved on December 17, 2008 from *BVC Policies, Guidelines, and Procedures Manual*, BVC Public Folders.

²² Bethany Care Society (2008 November 12). *Bethany Care Society Wins Two Employer of Choice Awards*. Retrieved October 30, 2009 from http://bethanycare.com/news-events/documents/NR_BCSWinsTwoEmployerofChoiceAwardsfor2009.pdf

²³ Bethany Care Society (2008 November 12). *Bethany Care Society Wins Two Employer of Choice Awards*. Retrieved October 30, 2009 from http://bethanycare.com/news-events/documents/NR_BCSWinsTwoEmployerofChoiceAwardsfor2009.pdf

Table 2: Employee, Job Seeker, and Employer Responses to Flexibility

Employee Responses to Flexibility (N=384)	Opportunity to work part-time would encourage them to keep a job into retirement	180 (60%)
Job Seekers Responses to Flexibility (N=54)	Would have difficulty getting another job because the work hours are not flexible enough	18 (33%)
Employers Response to Flexibility (N=18)	Currently provide opportunity for flexible work schedules	16 (89%)

A significant number of employers echoed the necessity of flexibility in focus groups. It is clear that employers are recognizing the need for flexibility, but there are challenges in actually implementing flexibility fairly.

“In terms of flexibility we can’t always accommodate this. Giving people different shifts is easy enough, but when people want to cut back hours, it becomes difficult when they are only interested in working 2 days a week.”

- Comment from Employer Focus Group

“There is an issue of attitude from employees over how they view their colleagues who receive flex time. There is an attitude of “Oh, must be nice to only work two days a week” which needs to be dealt with if an organization is going to adopt flexible options.”

- Comment from Employer Focus Group

2. Adapting the Work Site & Re-structuring the Job Assignment

“The work in our field can be physically and emotionally challenging, and we find that a lot of our mature workers simply do not want to do that type of work anymore”.

- Comment from Employer Focus Group

Physical Adaptations

Re-structuring the job/job site might be required where the physical demands of the job affect the ability of a 50 plus worker to continue in a current job. Some organizations change the work environment to make work less physically demanding. Employers can support and retain older workers, as well as workers who may have a physical disability, by providing resources for workplace accommodations, such as:

- Conducting ergonomic evaluations of employees as requested;
- Providing sit-stand work stations;
- Providing large screen/print computer monitors; and/or

- Providing telephones with amplified audio systems²⁴.

Some participants in the study simply viewed accommodation for the physical needs of 50 plus workers an expectation, which will be discussed further in the recommendations section.

“Employers have a duty to accommodate. They need to be willing to help the employee.”

- Comment from Employer Focus Group

Restructuring the Job Assignment

The second part of restructuring the job site is to go beyond minor physical adaptations and transition employees into new roles. Adapting currently existing roles or creating new roles for 50 plus workers that use their knowledge and expertise such as mentoring or supervisory roles is another way to accommodate employees and provide less physically demanding work.

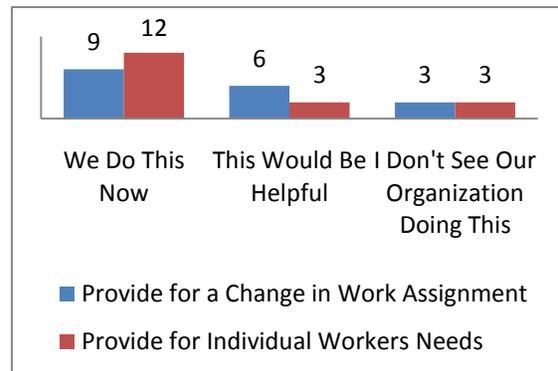
Transitioning employees to a different role in an organization could not only accommodate their physical needs but also provide a new and challenging role. “Just imagine you had done the same job for 15 years and your boss offered you the chance to do something new and interesting. It may not be for everyone, but some employees would jump at the chance. Just remember, this also helps you by creating a more multi-skilled workforce”²⁵.

²⁴ American Association of Retired Persons (AARP) (2008). *Staying Ahead of the Curve 2007: The AARP Work and Career Study*. Retrieved February 4, 2009 from http://assets.aarp.org/rgcenter/econ/work_career_08.pdf

²⁵ Victorian Employers' Chamber of Commerce and Industry (VECCI) (2003). *Recruiting, Retraining, and Retaining Older Workers: A Quick Guide for Small Business*. Retrieved December 17, 2008 from http://www.vecci.org.au/resources/vec011_quickguide_040106.pdf

Employer survey results indicate that this need to adapt the workplace for 50 plus employees is recognized. Nine of the employers in the Employer Questionnaire indicated they provide their 50 plus workers with the opportunity to have a change in work assignment, such as transitioning from a physically demanding job to a less physical job. Additionally, twelve employers indicated they provide for their 50 plus employees needs through adapting jobs, such as providing larger screens for computers or allowing employees to sit rather than stand. For example, an employer mentioned that an employee who had previously been employed as a housekeeper could complete training that would help him or her move to a supervisory role that was less physically challenging.

Graph 9: Employers in the Employer Survey Who Make Adaptations for Employees



3. Creating a Culture of Generational Inclusion

“One of the challenges, is not only having mature workers work and cooperate with the younger generation, but challenging the younger generation to work with their older colleagues and understand how the older generation might think and operate in ways that are very different.”

- Comment from Employer Focus Group

As discussed in the previous section regarding barriers, having upwards of three generations in the workplace presents new challenges, but also opportunities, for today’s employers. The literature recommends that employers “promote the value of experience and age” and “create a workplace culture that is positive for all employees”²⁶. Further, the literature encourages organizations to focus on creating/maintaining a discrimination-free work environment that encourages enhanced employee relations and effective communication/information-sharing among employees²⁷.

Studies have shown that creating a culture of generational inclusion is beneficial for an organization’s productivity²⁸. Researchers noted that “workers have a stronger commitment to quality, experience lower turnover, take fewer days off, are not as tardy and have excellent judgment based on years of experience”²⁹. Successful organizations capitalize on 50 plus workers as a source of experienced, reliable human capital by leveraging “the loyalty, productivity, experience and maturity of older workers by using them as mentors. [They implement] cross-generational

²⁶ Victorian Employers’ Chamber of Commerce and Industry (VECCI) (2003). *Recruiting, Retraining, and Retaining Older Workers: A Quick Guide for Small Business*. Retrieved December 17, 2008 from http://www.vecci.org.au/resources/vec011_quickguide_040106.pdf

²⁷ Towers Perrin Network (2008, March 19). *Benefits Strategies to Retain and Engage a Mature Workforce*. Retrieved May 4, 2009 from [http://www.cpbi-icra.ca/rtecontent/document/Workshop5\(new\).pdf](http://www.cpbi-icra.ca/rtecontent/document/Workshop5(new).pdf)

²⁸ Perry, P. (2005, April). Employers Find New Value in Mature Workers. *World Fence News*. Retrieved December 17, 2008 from <http://www.worldfence.com/articles/0405-Perry.pdf>

²⁹ Perry, P. (2005). Employers Find New Value in Mature Workers. *World Fence News*. Retrieved December 17, 2008 from <http://www.worldfence.com/articles/0405-Perry.pdf>

training and teams can be implemented so that workers of all ages can learn from each other [while utilizing retirees] on a full or part time basis to use and transfer their experience and know-how to younger managers”³⁰.

This study suggests that negative stereotypes can be changed by offering “management-level training and employee workshops to eliminate age-related bias in the workplace and educate managers about the value of older workers. Ensure that age bias [as discussed in the previous section on barriers] plays no part in hiring, training, or retention decisions”³¹.

When asked if they create a culture of generational inclusion, 16 of the 18 employers surveyed indicated that they had. However, more in-depth discussions in focus groups yielded a different view. Participants noted that there is a need for 50 plus workers to engage in training related to working in a multicultural and multigenerational workforce. Employers commented that the training needs are in both directions: both older and younger employees would benefit from generational and diversity training.

The focus groups confirmed the largely accepted assumption that there are significant differences between the age groups. For example, a distinct difference between the generations that was mentioned in focus groups and interviews is the difference in how generations prefer to be recognized. It was noted by employers that younger generations prefer to be recognized monetarily and older generations prefer to be recognized publically. Some organizations in Calgary have already begun instituting such programs. For example, the Marriott Hotel has implemented a rewards-based program that also includes employee recognition, reasoning, “It gives people a sense that their contributing to something bigger than their jobs...its helping our associates recognize its more than just a paycheck”³².

“There is definitely a difference between recognizing accomplishments and service for the different generations. We find that mature workers like to get their recognition in writing and they like to receive it publically... the younger workers don’t think that staying at a company for a long time is a good thing.”

- Comment from Employer Focus Group

Part of creating an inclusionary workforce is dealing with the attitudes within the organization. This includes the employer and their employment policies and procedures, staff that may hold pre-existing biases about 50 plus workers, managers that may be unwilling to accommodate to 50 plus workers’ needs for training and adaptations, and the 50 plus workers who may have difficulty envisioning themselves in new positions or roles.

³⁰ Business Council of Fairfield County (2007, December). *JobsNet Next Steps Council Study for Mature Workers*. Retrieved November, 2008, from <http://www.businessfairfield.com/webpdf/NextSteps.pdf>

³¹ Business Council of Fairfield County (2007, December). *JobsNet Next Steps Council Study for Mature Workers*. Retrieved November, 2008, from <http://www.businessfairfield.com/webpdf/NextSteps.pdf>

³² Sankey, D. (2009 August 24). *Workers Plan Moves Post-Recession*. *The Calgary Herald*. Retrieved October 6, 2009 from <http://www.working.com/calgary/sectors/Workers+plan+moves+post+recession/1924093/story.html>

4. Changing Employment/Pension Policies and Health Care Benefits

Although studies indicate that 50 plus workers are less likely to take sick leave and experience work related injuries³³, a number of best practices have been cited in regard to health care and related benefits, including:

- Extending health care benefits to older workers;
- Offering competitive health and other benefits to recruit and retain age 45 plus workers (even part timers receive full medical benefits); and
- Providing additional days off to enable an older worker to provide care to a family member³⁴.

A separate study suggested that employers should consider tailoring “programs to employees’ needs and desires within a reasonable cost structure that will build loyalty and increased productivity. Reconsider changing private pension plans that penalize work by older employees and revise them to be more age-neutral”³⁵. The best practices regarding health benefits this study suggested include:

- Allowing retirees to enter into the defined contribution plan;
- Suspending pension payouts and allowing employees to continue to increase pensions; and
- Rehiring retirees on a contract basis, with pay in lieu of benefits³⁶.

Out of the 303 employees who indicated they would continue to work into retirement in the Employee Survey, 61% indicated that having the ability to collect a pension without penalty would encourage them to keep a job into retirement. Respondents to the Job Seeker Survey echoed the importance of providing health benefits and access to a pension. Twenty-six (N=54) indicated that access to benefits was one of the most important parts of accepting a job and thirty indicated pension benefits was one of the most important elements of accepting a position.

Bethany Care Society has successfully responded to the challenges in providing flexible benefits to older workers. Bethany Care Society was awarded the 2009 Best Employers Award for 50-Plus Canadians, partially attributed to the “innovative example [of] flexible matching benefits programs...offered to part-time employees...extended beyond the age 65”³⁷.

“I think offering a good benefits package is attractive. Having a good RRSP plan, offering stock.”

- Comment from Employer Focus Group

³³ Australian Human Rights Commission (n.d.). *Mature Workers: Myths and Facts About Older Workers*. Retrieved November 9, 2008 from http://www.hreoc.gov.au/matureworkers/2_myths.html#2

³⁴ American Association of Retired Persons (AARP) (2008). *Staying Ahead of the Curve 2007: The AARP Work and Career Study*. Retrieved February 4, 2009 from http://assets.aarp.org/rgcenter/econ/work_career_08.pdf

³⁵ Business Council of Fairfield County (2007 December). *JobsNet Next Steps Council Study for Mature Workers*. Retrieved November 17, 2008 from <http://www.businessfairfield.com/webpdf/NextSteps.pdf>

³⁶ Business Council of Fairfield County (2007 December). *JobsNet Next Steps Council Study for Mature Workers*. Retrieved November 17, 2008 from <http://www.businessfairfield.com/webpdf/NextSteps.pdf>

³⁷ Workplace Institute of Canada. *Creating an Age-Free Workplace: Five companies awarded 2009 Best Employers Awards for 50-Plus Canadians*. Retrieved October 30, 2009 from www.workplaceinstitute.org/bea-winners-2009

5. Recruitment: Marketing to 50 Plus Workers

“It is about finding reasons [other than monetary] as to why a mature worker would want to work for you .. [what it is] about your jobs/culture that would attract people.”

- Comment from Employer Focus Group

Organizations are increasingly recognizing older workers as recruitable, retrainable, and retainable³⁸.

The Victorian Employers’ Chamber of Commerce and Industry has written about the recruitment of employees and suggests that “rather than using age-directed language in advertisements, best practices suggest that recruiters advertise for ‘demonstrated capacity to’ or ‘proven track record in ...’ as these phrases reflect the skills and abilities required, rather than the age of applicants”³⁹.

According to the American Association for Retired Persons, the 2008 Best Employers seek out the expertise and value inherent in 50 plus workers and implement targeted recruiting efforts, including:

- Ensuring that recruiting materials are designed to reflect broad diversity;
- Developing specific alumni programs designed to attract 50 plus and retired workers;
- Highlighting phrases, such as Retirees welcome;
- Tapping into community resources such as senior groups to recruit for part-time or temporary employment opportunities; and maintaining a database of retirees who are interested in returning to work on a part-time basis⁴⁰.

Fifteen of the respondents in the employer survey stated that they would consider hiring 50 plus workers as part of their human resources strategy. However, there is a considerable gap between the expressed goal or desire to hire 50 plus workers, and the implementation of targeted recruitment efforts.

Graph 10: Employer Response to Recruiting 50 Plus Workers (N=18)



³⁸ Smith, J. (n.d.). Project Mature Worker, Understanding the Older Worker. Retrieved January 5, 2009 from www.grcc.edu/mature

³⁹ Victorian Employers’ Chamber of Commerce and Industry (2003). *Recruiting, Retraining and Retaining Older Workers: A Quick Guide for Small Business*. Retrieved December 17, 2008, from http://www.vecci.org.au/resources/vec011_quickguide_040106.pdf

⁴⁰ American Association of Retired Persons (AARP) (2008). *Staying Ahead of the Curve 2007: The AARP Work and Career Study*. Retrieved February 4, 2009 from http://assets.aarp.org/rgcenter/econ/work_career_08.pdf

Comments from focus groups described a variety of ways employers could recruit 50 plus workers, including:

- Use employment websites/Career Builder;
- Advertise the company values/culture and how this could appeal to 50 plus workers;
- Obtain referrals from other workers;
- Focus on soft skills and work experience, as opposed to education in job descriptions; and/or
- Look to branding techniques, job fairs, or other methods that apply specifically to 50 plus workers.

"I think the whole combination of things we did, newspapers, television, print ad[vertisements], in person contact and word of mouth all helped our recruitment campaign, which was very successful... I think when looking at recruitment it is important for companies not to focus too much on only one method....you want to use a variety of different recruitment tools".

- Comment from Employer Focus Group

"Mature workers are one of the fastest growing groups to be joining Facebook: we could look to these technologies to recruit mature workers as well."

- Comment from Employer Focus Group

6. Addressing Training Needs and Opportunities

The need for training emerged as a theme in the literature and was reinforced in the surveys and focus groups. Retraining and continuing education are seen as positive ways to increase job security and achieve promotions, maintain market value, and prepare for career changes⁴¹. The study findings reflect both the kinds of training programs that are important for the 50 plus population as well as the delivery formats that would be preferred. However, training programs on their own are not seen as sufficient in many cases. Services to accompany training were seen by many as essential.

Delivery of Training Programs

"Flexible" and "short" programs were the two main themes that arose in this study. 50 plus workers want courses and programs to be offered at times that accommodate their schedules and in convenient locations. This may mean offering courses and programs through e-learning or blending e-learning with face to face delivery, and/or at community sites. The majority of feedback from surveys and focus groups indicated that programming should include career specific training and related career services.

⁴¹ Banks, A. Ezine Articles: the Baby Boomer and Continuing Education. Retrieved January 5, 2009 from <http://ezinearticles.com/?The-Baby-Boomer-And-Continuing-Education&id=1193592>

Job Seekers were much more willing to attend training courses full-time; however, their answers regarding the length of the program were similar to those of employees. Approximately 38% of job seekers in the Job Seeker survey and 74% of employees in the Employee survey indicated they would only be willing to spend less than 6 hours in training per week. In addition, 76% of job seekers and 68% of employees said they would only be willing to attend a training or education session that was less than 6 months in length.

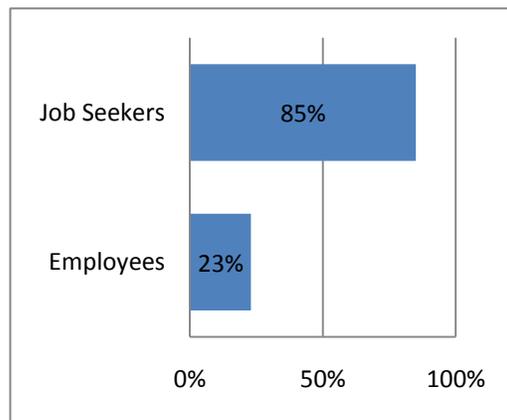
“It is important to remember that any training program that is put into place must be flexible. Mature workers do not have the time to devote to a full-time, intensive program. For example, offer courses that are only 3 days a week, or online etc.”

- Comment from Employer Focus Group

Affordability

Only 21% of employees and 12% of job seekers surveyed stated they had the means to pay for their own education. 20% of employees and 35% of job seekers would require a loan that he or she could pay back after training was finished. 20% of employees and 72% of job seekers would require a grant that would not have to pay back. Some programs and colleges currently being offered provide tuition reimbursement, reduced tuition fees, or subsidies for 50 plus students. An additional source of financial support for training could be from employers.

Graph 11: Job Seekers vs. Employees Surveyed Who Need Financial Aid to Pay for Training and/or Education



“Money is also an issue for many older workers. Any training offered should be affordable.”

- Comment from Employer Focus Group

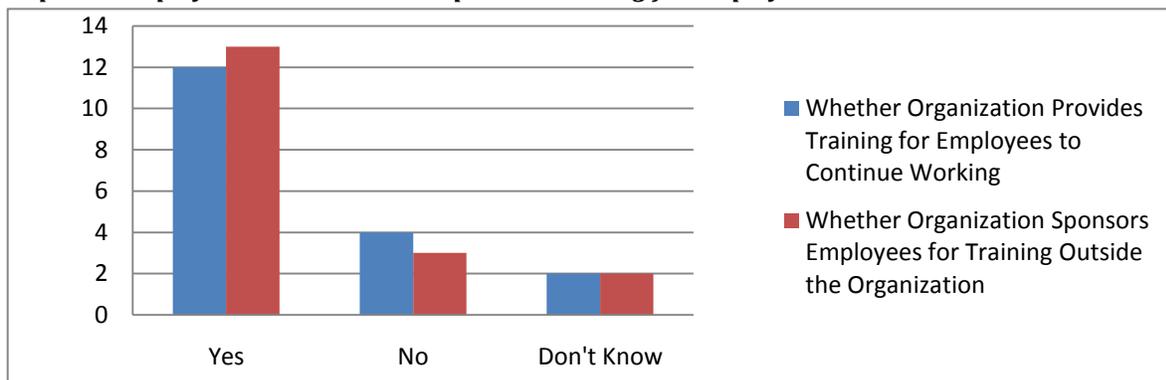
Providing Professional Development and Training in the Workforce

As mentioned above, 72% of respondents in the employer survey indicated they sponsor employees for further training. Studies such as those conducted by the AARP encourage organizations to “promote opportunities for older workers to upgrade skills” and “ensure that older workers receive the same access to employer-provided training as younger colleagues”⁴². Towers Perrin suggests that it is important to “provide training programs for older employees, incentives for lifelong learning and professional training and certifications for unskilled workers”⁴³.

Twelve of the eighteen employers surveyed in the Employer Survey stated that they provide specific training for 50 plus employees to enable them to continue working within the organization. Additionally, thirteen of the employers indicated that they currently sponsor employees for training outside of their organization. However, what is missing that was mentioned in focus groups is that this training is not necessarily targeted to 50 plus workers. Many of the employers mentioned a lack of tailored training programs for this group of employees.

There is a difference in the type of training that employers feel 50 plus workers and job seekers require to successfully remain in or transition back to the workplace, and the type of training that 50 plus employees and job seekers believe would benefit them. Employer responses in both the Employer Survey, and through the Employer Focus Groups, underscored the importance of soft skill training such as diversity training, dealing with change, working in a multi-generational workforce, mentorship and life skills training. In contrast, the majority of employees and job seeker survey responses indicated that these groups believe that technical training, such as learning/updating computer skills, or receiving occupation specific training would be of most value to them.

Graph 12: Employers Who Provide or Sponsor Training for Employees



⁴² Business Council of Fairfield County (2007 December). *JobsNet Next Steps Council Study for Mature Workers*. Retrieved November 17, 2008 from <http://www.businessfairfield.com/webpdf/NextSteps.pdf>

⁴³ Towers Perrin Network. (2008, March 19). *Benefits Strategies to Retain and Engage a Mature Workforce*. Retrieved May 4, 2009 from [http://www.cpbi-icra.ca/rtecontent/document/Workshop5\(new\).pdf](http://www.cpbi-icra.ca/rtecontent/document/Workshop5(new).pdf)

Areas of Training & Education

The following list of training ideas is based on findings from focus group respondents, interviews with key informants, survey data, and literature review:

a. Personal Development & Skills Assessment: “Creating a Business Plan for Your Life”

Focus group participants felt that 50 plus workers need a unique assessment program that accounts for their needs. Employers mentioned that 50 plus workers sometimes had problems envisioning themselves in new positions, especially if they had worked in the same position or department for a number of years, and that many 50 plus workers are unaware that they have skills which are transferable to other jobs. An example mentioned was a healthcare worker who did not think she could transition into a secretarial role.

“Training should be offered which can help people determine what their needs are. For example, creating a business plan for yourself so that if you want to start consulting, or move to part-time.... If employees can market their business plans to their managers, the manager might think ‘hey that is an option I never thought of.’”

- Comment from Employer Focus Group

b. Mentorship Training

There was support for developing a training program which could help develop the types of skills needed in mentors, such as communication skills. This program would focus on different training techniques that might be more successful on 50 plus workers and informing other generations about the value of these 50 plus workers. In addition, the idea of a ‘reverse’ mentorship program was mentioned, whereby younger employees mentor 50 plus employees in technology skills such as using blackberries, social networking sites or different computer programs. As an example, Bow Valley College is piloting a mentoring program whereby younger employees (millennials) will be working with older employees (baby boomers) to share their knowledge of computer technology, particularly in the area of communications and application of new technology.

“If a company is able to show right from the start that they value their mature employees’ knowledge, mentoring and training can be advantageous to the company as well as the mature worker. This mind set needs to be developed in the company culture.”

- Comment from Employer Focus Group

c. Computer & Technology Training

In both the employee and the job seekers surveys, technical and computer skills training were often mentioned by respondents as training that they felt was relevant for either their retention or re-entry into the workplace. 27% of respondents to the employee survey indicated they were interested in computer and technology training, 28% of employers in the employer survey indicated technology upgrading would be useful for 50 plus workers, and over 67% of job seekers indicated they were interested in computer training. The large discrepancy between job seekers and the other two survey groups could potentially stem from the fact that the job

seekers have been out of the job market for a period of time, and therefore may feel that their technology skills are more obsolete than workers who are currently employed⁴⁴.

In the employer focus groups, computer and technology training were not mentioned often and comments were mixed. Some employers felt that 50 plus workers needed to upgrade or learn basic computer technology skills, while others felt that most 50 plus workers had basic computer knowledge but were falling behind when it came to understanding the different methods of social networking such as blogging, text messaging, and using Facebook.

“I think computer skills training is something that a lot of the mature applicants who come in need. In terms of computer skills, I mean just basic word and excel skills, how to use outlook, send e-mails, and draft letters.”

- Comment from Employer Focus Group

d. Multi-Generational Training & Education: Teaching Communication and Diversity

Issues about the ability of 50 plus workers to communicate with other generations as well as to work in diverse workplaces were common topics among employers in both the employer survey and the focus groups. One employer noted that employers should educate their workers not only about different cultures and customs, but also about the different sub-cultures that exist such as the gay and lesbian community. There were a few participants who noted that sometimes 50 plus workers become set in certain routines and are resistant when people work on tasks in a way that is different, which can cause tension in multi-cultural workplaces where different work practices may flow from different cultural upbringing. The need for communication skills training was also reflected in the Job Seekers Survey where 35% of job seekers who indicated they would take training or education would be interested in a communication skills course. An intergenerational communication course should not only focus on verbal communication skills, but also the variety of different communication methods that are used by different generations in the workplace. One employer pointed out that 50 plus workers may be annoyed or frustrated at receiving digital communications such as e-mails or instant messages when they believe it would be more appropriate to discuss the topic face-to-face or over the phone.

“One thing that we struggle with for the boomers is adapting them to working in a much more diverse workplace. The workplace in Calgary has changed dramatically over the past 10 years, and many employers were not prepared for this.”

- Comment from Employer Focus Group

“Mature workers need to become more comfortable with different communication models such as email and texting.”

- Interview with Career Counselor

⁴⁴ One other factor could be that a large number of employee survey respondents were from the healthcare sector, and therefore may not have a high need for computer training, whereas the job seekers were more representative of a wide variety of sectors.

e. Job & Interview Skills

A topic that emerged in both the employer focus groups and the Job Seekers Survey was that 50 plus workers need retraining in marketing themselves to employers through basic job application skills such as preparing a resume, interviewing and networking. In the Job Seeker Survey, 33% of the respondents indicated that they were interested in taking resume and job skills training courses. There are many 50 plus workers who may have not applied for jobs in upwards of 20 years, and therefore may not be aware of current resume formats, job search techniques and interview skills. An employer pointed out that older and younger workers may have the same skill sets, but 50 plus workers usually have more experience. 50 plus job seekers should therefore highlight their accomplishments, as opposed to listing tasks they completed in past employment. Further, some workers need to learn how to sell themselves in a way so that they do not come across as overqualified. Appearing overqualified is common amongst 50 plus workers who are looking to transition into roles that have less responsibility.

Fifty plus workers also have particular needs when it comes to interview skills. Employers mentioned in focus groups that 50 plus workers often come across as insecure in interviews. Some employers indicated that it might be a generational issue, whereby many baby boomers are not as comfortable marketing themselves and “boasting” about their skills and talents as the younger generations. A final issue related to job-skills which arose was the process of job-finding. Focus group participants stated that many 50 plus workers may not be aware of the online tools that can be used to search for new positions.

“I think the number one skills that need to be addressed are how do I do a resume and how do I do an interview? How do I sell myself? This has to be a major part of any training program.”

- Comment from Employer Focus Group

Summary of Key Findings

Findings of this Calgary Based study are generally very consistent with findings from larger studies in North America. We found that:

1. Although the current economic climate has decreased the sense of urgency for retaining and recruiting 50 plus workers, employers still see the recruitment and retention as a vital human resource strategy. Fifty plus workers are largely seen as extremely valuable to their organizations.
2. To benefit most from the recruitment and retention of 50 plus workers, thoughtful and purposeful strategies need to be implemented. These include: using age-directed language/recruitment strategies, looking to community resources and events that focus on the plus 50 demographic, and showing that the organization values 50 plus workers.
3. Training is a key component of successful practices in the recruitment and retention of 50 plus workers in meaningful employment. Best practices in training include short-term, focused training programs that meet specific employment-related needs or focus on soft skills, such as intergenerational communication.
4. Services that accompany training are equally important. For example, career counseling specifically targeted to 50 plus workers that teach job finding, resume writing, and interview skills would benefit plus 50 job seekers more than a generalized training program.

Some of the above conclusions are presented in more detail in the recommendations section which follows.

VI. RECOMMENDATIONS

A. Recommendations for Employers: Instituting Best Practices

1. Providing Flexible Work Arrangements and Schedules

One of the most frequently mentioned best practices was that employers provide flexible work arrangements. Recommendations for instituting this include offering part-time hours, contract-based work assignments, transitioning into a new role or position, or offering varying working days. Some ways flexibility could be instituted, as suggested from the study, include:

- Training or courses to help workers transition into a new position/envision themselves in a different role, such as a mentor or a position with less responsibility or that are less physically challenging
- Developing rehirement policies to bring back employees to fill contract positions
- Transitioning from a full-time employee to a part-time employee

2. Adapting the Work Site & Re-structuring the Job Assignment

Study findings indicated that it would be a positive practice for employers to adapt or restructure the job site for 50 plus workers. This can include minor adaptations such as changing the size of the computer monitors to modifying the job position so an employee can move from a more physical job to a less physical job, such as moving from a labor-intensive position to becoming a mentor or supervisor. Consultation from key informants indicated that while this is a positive practice, the larger focus should be about making the changes for all employees to function most effectively in their positions.

Questions management and HR personnel may consider asking to determine if this is feasible is if the problem is medical related, and/or if someone is getting close to what is a normal retirement age and could be looking to transition or remain in his or her current position. If it is medical related or based on a “personal development plan”, other employees are less likely to see it as “favoring” a specific population within an organization. Research findings indicate that employers could focus on providing accommodations that would help the employee perform better and what roles or positions benefit the organization. Practicing this could lead to a more inclusive workplace not only for 50 plus employees but all employees.

3. Creating a Culture of Generational Inclusion

Providing training on creating an inclusive, multigenerational workplace may help generations communicate more effectively as well as facilitate positive employee relations. The study indicated that an effective way to do this could be to provide in-house or short-term training.

4. Changing Employment/Pension Policies and Health Care Benefits

An idea that arose from focus groups and the employer survey was that employers could institute health spending accounts to provide a more flexible benefits plan, and include part-time and contract employees in the benefits plan.

5. Targeting 50 Plus Workers in Recruitment

Consistent with the best practices was the development of strategies and tools for assisting HR professionals. Employers could do so by utilizing specific, concrete strategies, such as attending or creating career fairs for older adults/second careers, communicating that plus 50 workers are valuable to the organization, or using language and visuals that appeal to plus 50 workers.

Discussions with employers reaffirmed that these recommendations are most successful if viewed holistically, as a series of steps employers can make to make the workplace more accessible for 50 plus workers. The more recommendations an employer is able to implement, it was indicated, the greater likelihood of having a generationally inclusive, productive, and successful workplace.

B. Addressing Training Needs and Opportunities: Recommendations for Community Colleges

The study indicated the need for the implementation of the need for 50 plus workers and learners. Designing affordable, flexible, specific programming would be consistent with the study's findings. Additionally, smaller initiatives, such as making course registration simple and accessible, could help to encourage more working adults to register for classes. Other potential ideas for community colleges include: develop condensed learning in the forms of shortened courses or programs; provide services and job-related training programs; facilitate industry-specific training; develop computer/technology training specifically geared towards 50 plus workers/learners; and/or facilitate workshops or seminars regarding managing life and career transitions.

C. Recommendations for Bow Valley College

The findings of this study will assist Bow Valley College in ensuring that the needs of 50 plus workers and employers will be met. Below are some of the avenues that are currently being explored:

1. Seek partnerships with employers to develop work sites or on-sight training relating to the topics discussed in this paper.
2. Examine the possibility of expanding BVC career counseling services to the plus 50 population
3. Pursue the development of tools that will assist employers and plus 50 workers in assessing employment opportunities and their skills
4. Pursue funding opportunities for programs specific for plus 50 workers such as technology training
5. Ensure that marketing for current programs and courses targets 50 plus workers and allows mature workers to register for part-time or continuing education courses in specific courses in certificate and diploma programs
6. Examine the possibility of bundling already existing courses to provide continuing education certificates for 50 plus workers

D. Next Steps: Developing Resources for Employers, Colleges, and Career Counselors

One of the findings that came out of this study was the need to support 50 plus job seekers and employees in their transition to a new/different job. Such support might be the development of related resources, geared to the needs of 50 plus workers, for employers, career coaches and job seekers. Conversations with career coaches interviewed for the 50 Plus Worker Study revealed that 50 plus workers/job seekers have specific career transition or career search needs that are currently not being met. Developing resources specifically designed for 50 plus individuals would enhance their knowledge of the career development process would be a resource for career coaches to assist 50 plus workers in retraining or finding employment. Bow Valley College, with the support of the Steering Committee, is investigating opportunities to develop such resources.

As mentioned earlier under Mentorship Training, Bow Valley College personnel in Human Resources are completing an applied research project to pilot a mentoring program in the area of computer technology and communication whereby younger employees (millennials) with a good knowledge of computer technology will be mentoring older workers (baby boomers) on various computer based communications such as Facebook and Twitter, and instructional technologies such as Adobe Connect, Blackboard, Wikis and Clickers. In addition, this project will provide an opportunity for cross-generational relationship building.

Knowledge dissemination activities have been implemented throughout the project, including a presentation to the Association of Canadian Community Colleges, Continuing Education and Workplace Training Affinity Group, and an application to present to the Alberta Association of Human Resource Professionals, which will take place in May.

The Office of Applied Research & Innovation at Bow Valley College will be pursuing further opportunities to disseminate the findings of the study in the following year, as feedback has indicated that this is a topic that is of interest and concern to employers throughout Alberta.

VII. CONCLUDING THOUGHTS

“We need to look at individuals, and sit down with them and see what they want. We need to be creative in the solutions we come up with for these individuals in terms of retaining them in the workforce.”

- Comment from Employer Focus Group

This study has demonstrated there is a strong need to start developing programs targeted to 50 plus workers in Canada. This is not an issue that can be targeted by one specific institution, but instead requires collaboration between colleges, employers, and government to support the reentry and retention of 50 plus workers in the workforce.

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