

2009 QNET Excellence Conference – GET FOCUSED

Workplace Wellness

What's It Going to Take?

(Hiring & Retaining Mature Workers)

By

Eileen Kirton

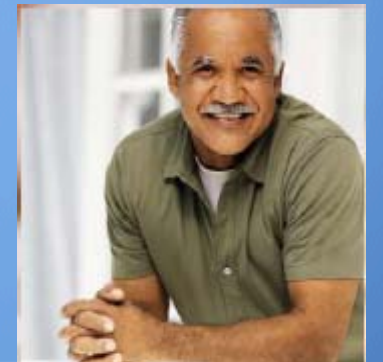
Vice-President, KWA Partners

A Division of People *First* HR Services

Rose Dziadekwich

Project Manager, “Retention of Older Workers”

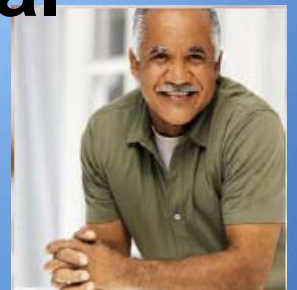
Seven Oaks General Hospital





Outline

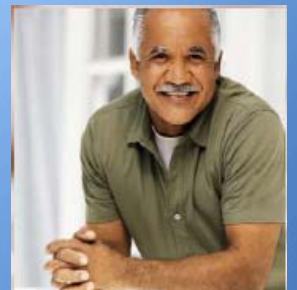
- **What's Happening and What are the Challenges**
- **Factors in Decision to Work in Retirement**
- **Benefits of Mature Workers**
- **Strategies and Best Practices**
- **Some Local Success Stories**
- **The Seven Oaks General Hospital Experience**
- **The Retention of Older Workers Project**





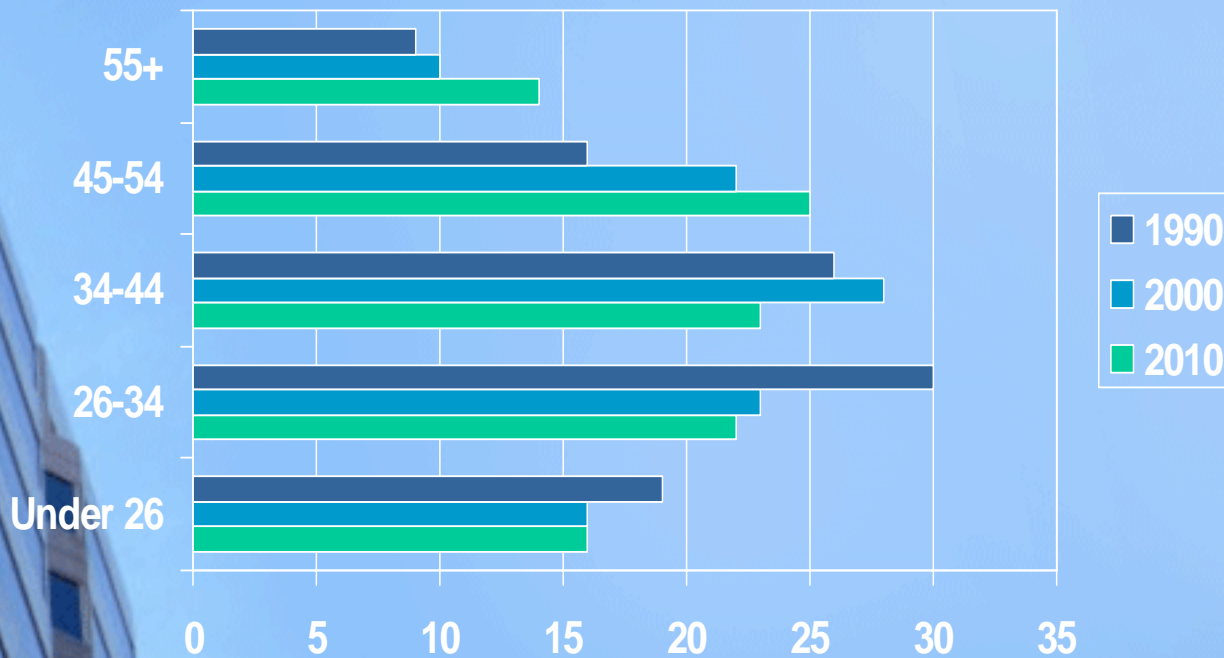
Three Factors

- **The Environment**
- **The Company**
- **The Mature Worker**



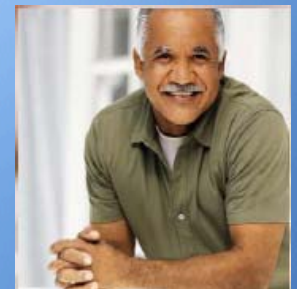


Canadian Workforce Demographics



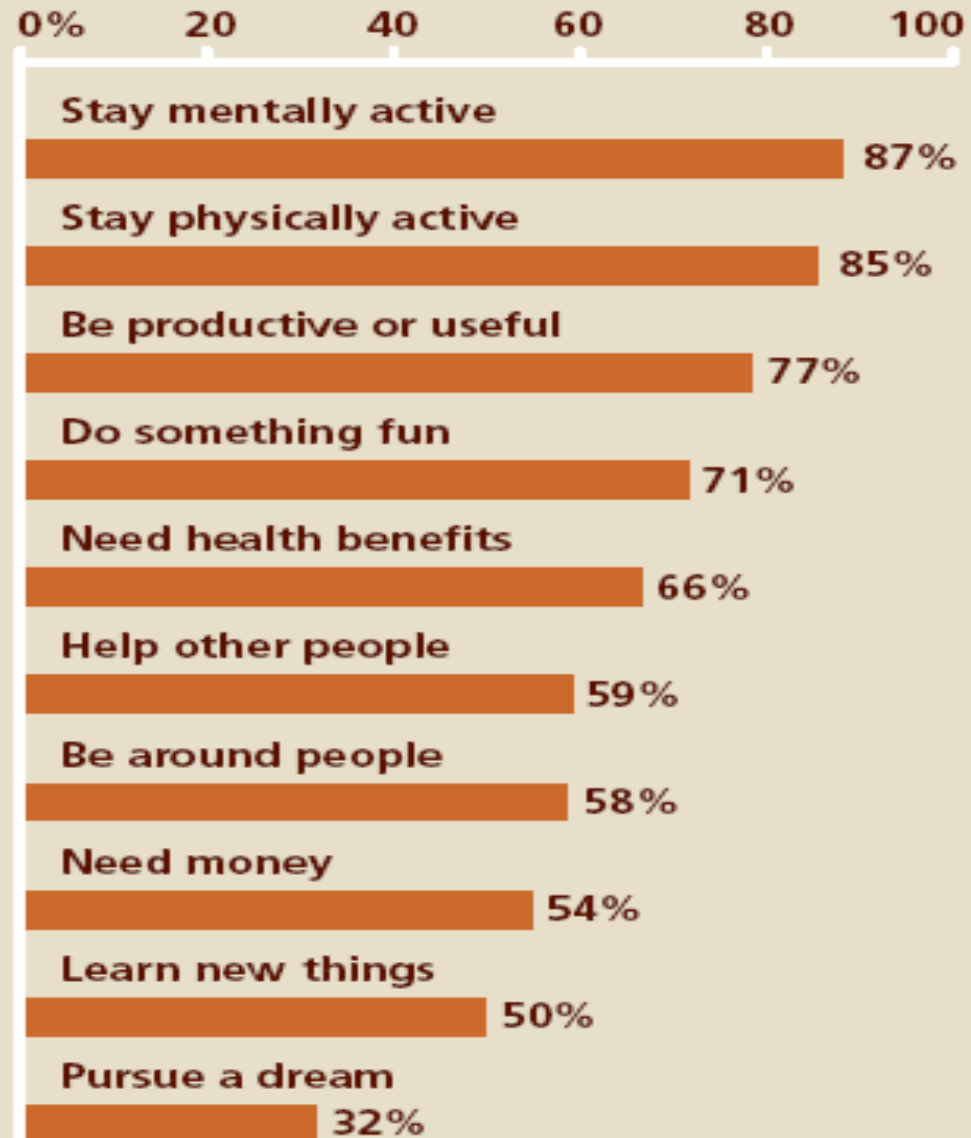
| % Change by age 2000 – 2010 | |
|-----------------------------|-------|
| - Over 55 | + 35% |
| - 45 – 54 | + 14% |
| - 34 – 44 | - 18% |
| - 25 – 34 | - 6% |
| - Under 25 | - 1% |

Source: OECD Labour Force Stats: United Nations (2000)





Major Factors in Decision to Work in Retirement



AARP Working in Retirement Study



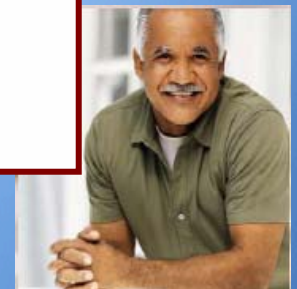


Benefits of Mature Workers

Positive traits older workers bring to the workplace



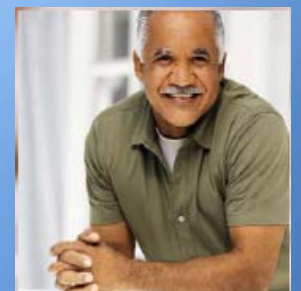
Source: CFIB Older Workers Survey, Feb 2007





Barriers – Perceived and Real

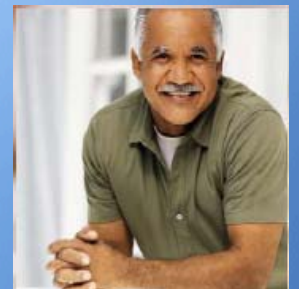
- **Stereotypes**
- **Productivity concerns**
- **Government Regulations – Pension, Income Tax**
- **Some Collective Agreements**





Barriers – Perceived and Real (Cont'd)

- **Physical demands**
- **Perceptions of 50+ about availability**
- **Myth of increased benefit cost**
- **Overwork / fatigue / stress**





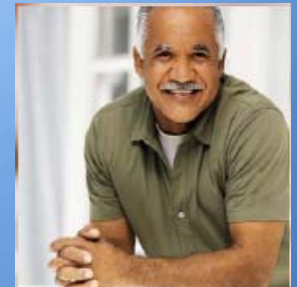
**Company and 50+
Workers Needs Met**

**Programs and
Practices to
Accommodate**

Communication

**Company need
for knowledge
workers**

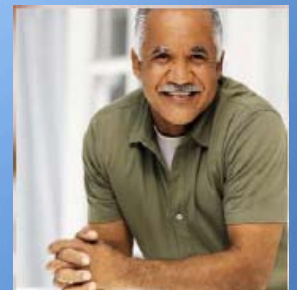
**50+ desire to
contribute**





Alternate Working Arrangements

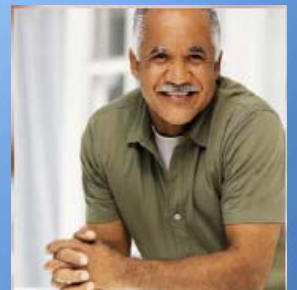
- **Phased Retirement**
- **Sabbaticals / Trial Retirement**
- **Rehire as part time / seasonal**
- **Job share**
- **Flexible hours / compressed work week**
- **Contract work / telecommuting**
- **Working Caregiver Leave**





Role Changes

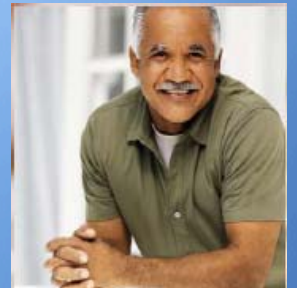
- Retain as trainers or internal consultants
- Retain as mentors
- Reduce physical requirements
- Transfer to less demanding roles
- Modify job
- Individual accommodation





Training and Development

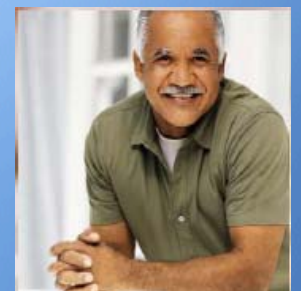
- Foster career development – at all ages
- Accommodate physical training needs
- All documentation (soft and hard) in larger print
- Innovative ways to avoid career stagnation





Training and Development (Cont'd)

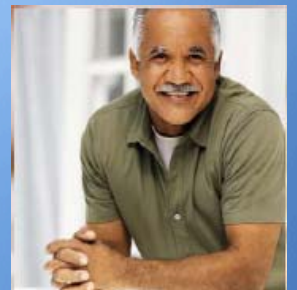
- **Formal knowledge transfer programs**
- **Expand diversity awareness**
- **Train leaders how to manage intergenerational workforce**
- **Discuss age bias in leadership development programs**





Rewards and Benefits

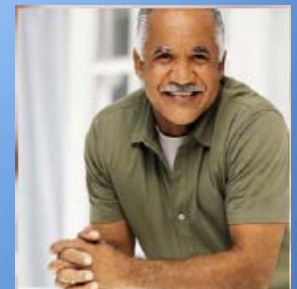
- Consider retention bonuses
- Salary deferment program
- Reduce to PT & keep benefits
- Flex benefits
- Fitness and Wellness
- Eldercare





Rewards and Benefits (Cont'd)

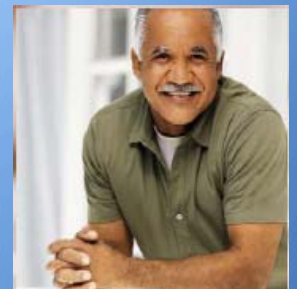
- **Retiree benefits**
- **Vacation buying/selling**
- **Consider unique vacation program**
- **Financial planning assistance**
- **Career transition support**





Recruitment and Selection

- Re-hire retired staff
- Create a “retirees on call” program / retiree pool
- Ensure shortlisters and internal interviewers don’t discriminate

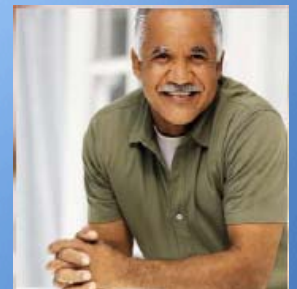




Recruitment and Selection

(Cont'd)

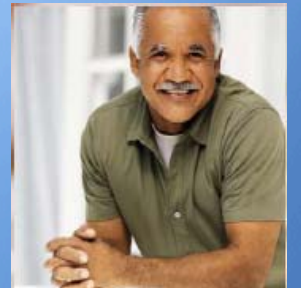
- **Ensure external search firms know your emphasis**
- **“Interim management” search**
- **Challenge hiring managers /your paradigms**
- **Target mature workers by advertising**





Work Environment & Culture

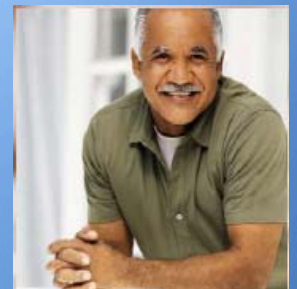
- **Keep connected to your retirees**
- **Appoint internal persons as “go to”**
- **Ensure “employer of choice” initiatives include mature workers**
- **Survey 50+ workers**
- **Analyze Opinion Survey by age**
- **Consider “mature employee retention program”**





Some Local Success Stories

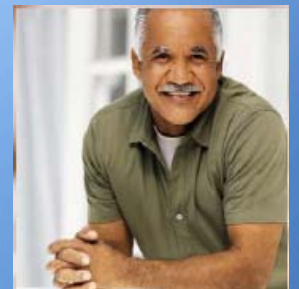
- **The Canadian Wheat Board**
- **Statistics Canada**
- **Red River College**
- **Lifetouch**
- **Canadian Footwear**
- **Seven Oaks General Hospital**





Seven Oaks General Hospital

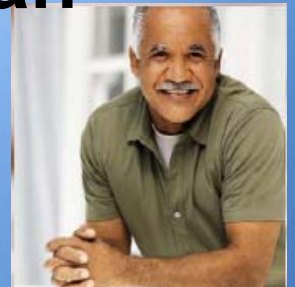
- **Opened 1981**
- **293 bed community hospital**
- **Over 1500 employees**
- **Family Medicine, Surgery, Emergency, Rehab/Geriatrics, Mental Health, Oncology, Dialysis**
- **The Wellness Institute**





Challenges

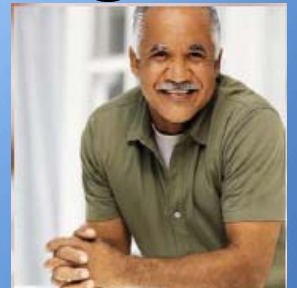
- One value culture – *“bottom line at any expense”*
- Aging Workforce
- High Vacancy Rate
- High Sick Time
- High WCB – Time Loss Claims
- High Agency costs to replace staff





Impact on Staff

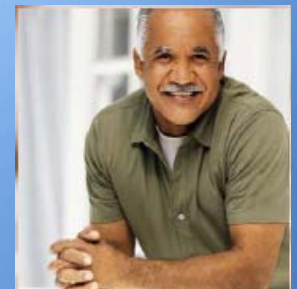
- **Caring for sicker patients with less help**
- **Working double shifts; often returning to work 8 hours after last shift ended**
- **Inadequate rest**
- **Aches and pains from lifting/pulling**
- **Increased back injuries**
- **Negative job satisfaction**





Getting Ready For Change

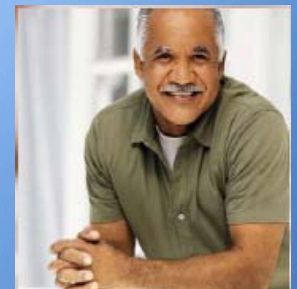
- **Integrate philosophy of a healthy organization into business strategy**
 - Part of budget
 - Set targets and then measure
 - Employer of choice strategy
- **Integrate healthy organization into corporate values and mission**
- **Executive Leadership Support**





Tools

1. **Health Risk Appraisal**
2. **Employee Satisfaction**
3. **Absenteeism Rates**
4. **WCB Rates**
5. **Long Term Disability Rates**
6. **Staff Turnover Rates**
7. **Focus Groups/ Surveys**
8. **Participation Statistics**

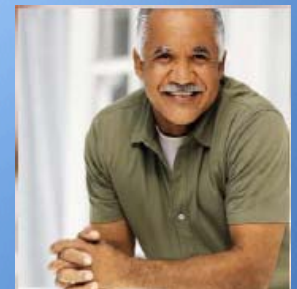




Health Risk Appraisal

- **Individual Health**
 - Health status and history
 - Lifestyle and personal health practices
 - Readiness to change
 - Immediate health report with access to resource pages

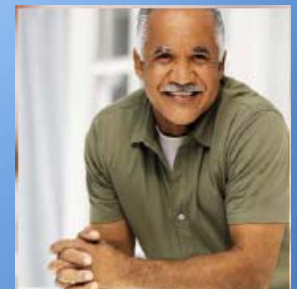
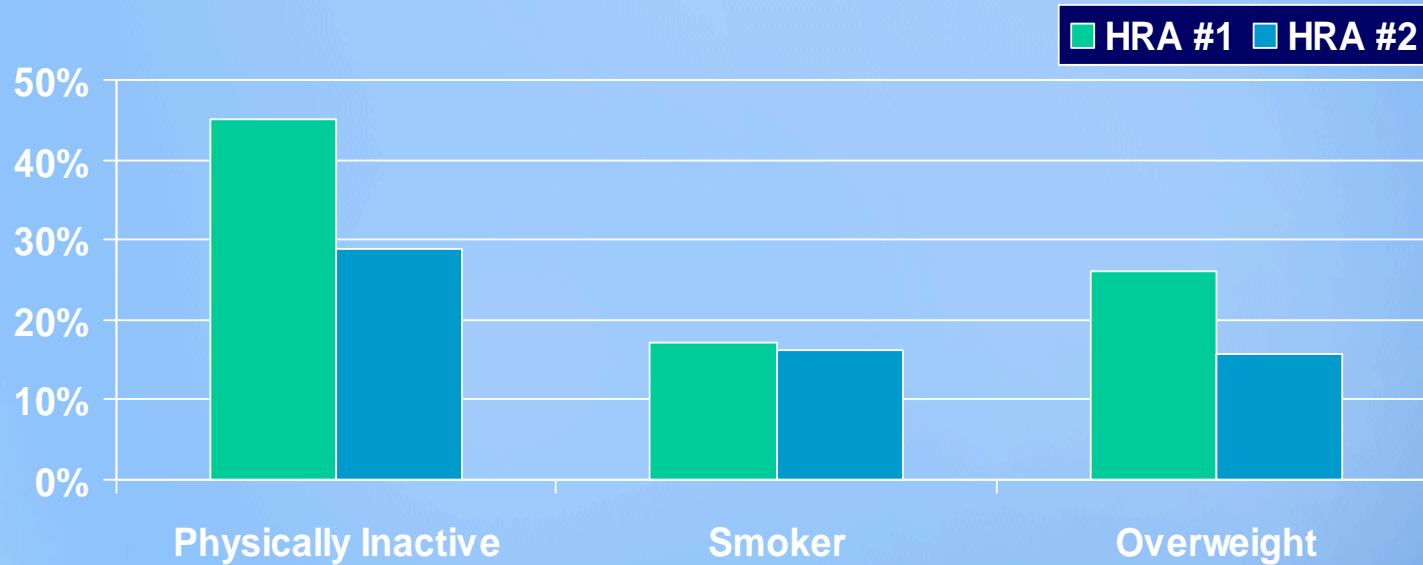
- **Organizational Health**
 - Organizational climate
 - Work-life balance
 - Perception of workload and stress





Outcomes to Date....

Employee Health Risks



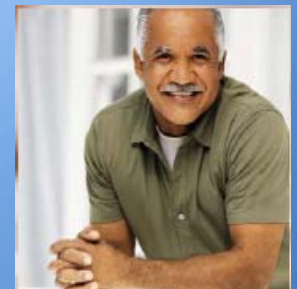
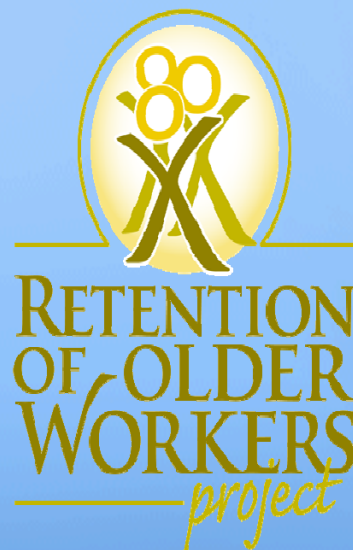


Human Resources and
Skills Development Canada

Ressources humaines et
Développement des compétences Canada

Retention of Older Workers Project

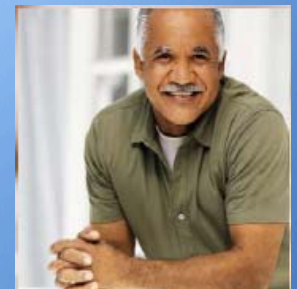
- **Funded by HRSDC: Workplace Skills Initiative Program (WSI).**
- **Two year Project to March 31, 2010**





SOGH Demographics

- **48 % of 1547 SOGH staff over age 45**
- **32 % of the above are over age 50**
- **5% are at or past Magic 80 & eligible to retire**

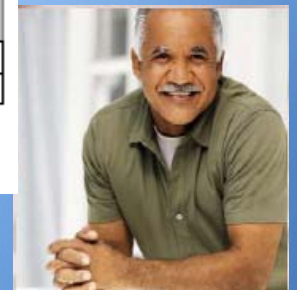
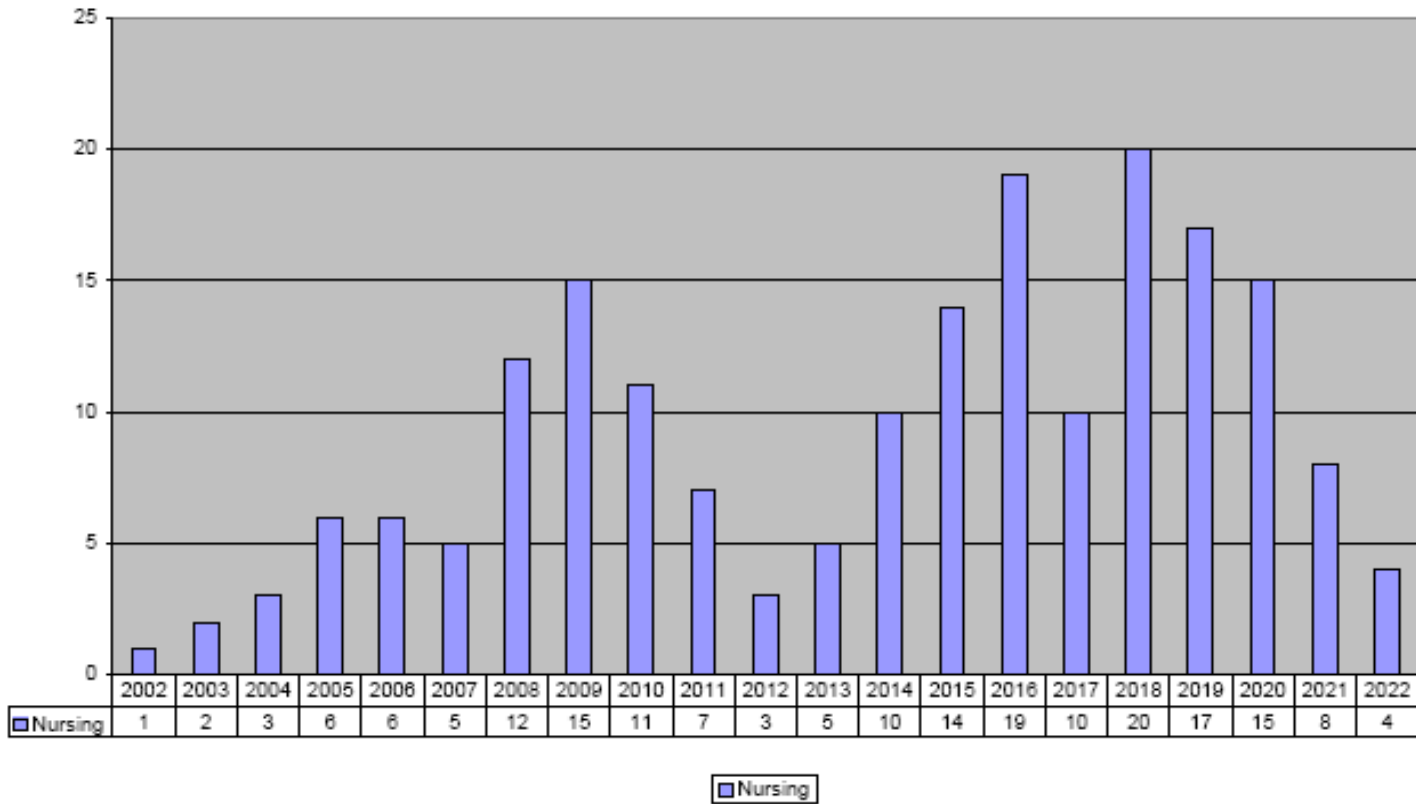




Nursing

Seven Oaks General Hospital
Employees Over Age 50 at Magic 80 by Year
As At July 12, 2008

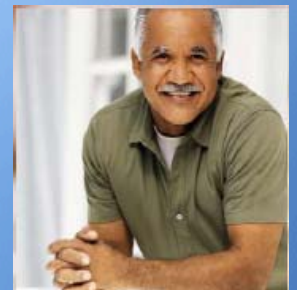
Nursing





Project Initiatives

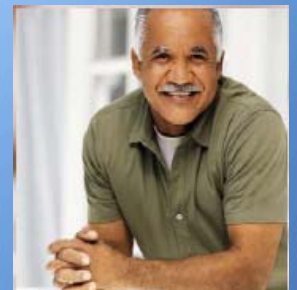
1. **Research**
2. **Retirement Planning**
3. **Work Life Issues**
4. **Older Worker Leave (OWL) 😊**
5. **Knowledge Transfer**
6. **Flexible Scheduling**





45+ Survey

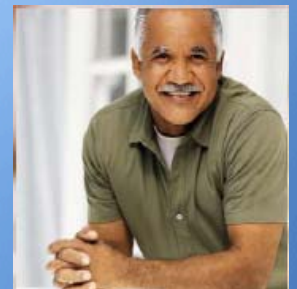
- 126 respondents; 36% return rate.
- Stratification by profession:
 - 60% of respondents: Nurses
 - 20% of respondents: Physiotherapy / Occupational Therapy
 - Remaining 20%: Other





45 + Survey

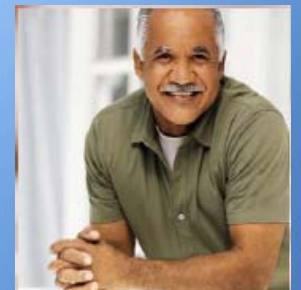
1. **Flexible hours of work leading to retirement**
2. **Retire and return to work options**
3. **Improved physical working conditions**
4. **Creation of a healthier work environment**
5. **Decreased responsibilities and workload**
6. **Recognition of prior learning and experience**
7. **Pass on the Profession**
8. **Provide effective care**





SOGH Retirees Focus Group Priorities

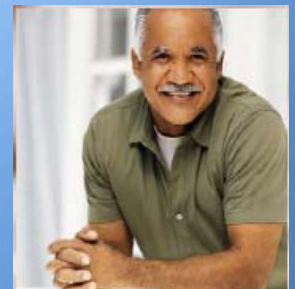
- **Imparting knowledge i.e. mentor to younger staff**
- **Less physically demanding work**
- **Less paper work**
- **Social connectedness**
- **Exit Interviews**





Retirement Planning Education

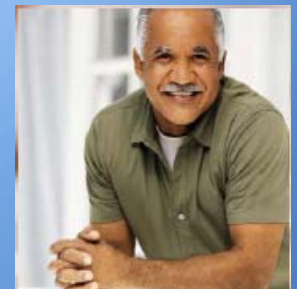
- **3 Sessions: Health Employees Pension Plan, CPP & Financial Planning held every six months**
- **Pre / post survey results: Average score of 4.94 / 7 when asked if they felt more capable of making informed decisions regarding retirement**





Work life Issues

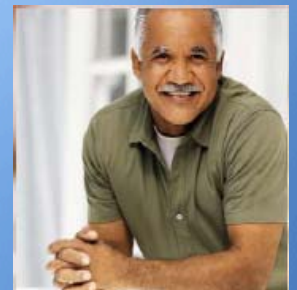
- **Link with hospital Orientation allowing older workers to upgrade skills**
- **Link with Wellness Institute programs**
 - ✓ **Assessment fee & first 3 months membership paid**
 - ✓ **Physical activities: Yoga, Medical Screening, Fitness Training**
- **Educational Sessions:**
 - ✓ **Intergenerational Issues: Lit review & Session**
 - ✓ **The Sandwich Generation**
 - ✓ **Raising Teenagers & Surviving Adolescence**





Older Worker Leaves (OWL)

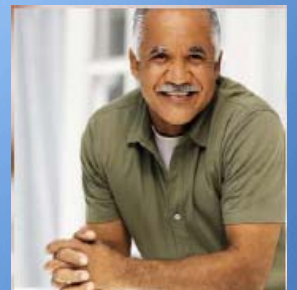
- Leave of Absence from current position for 12 or 24 weeks
- REST and REJUVENATION
- Trial retirement period
- Paid 55% of current salary by the HRSDC Project
- Pilot Study June 09 – Jan 10; 15 staff participating
- Return of Service Agreement of 1 – 2 years





Retirees Forum

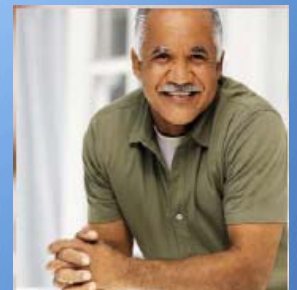
- **Stay connected to SOGH**
- **Electronic copy of hospital newsletter**
- **Notification regarding older worker programs**
- **SOGH & Wellness Institute website**





Casual Employment

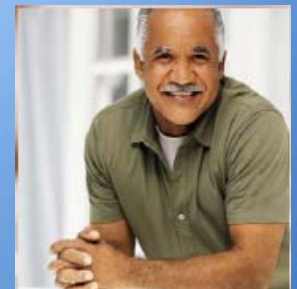
- **Retire at Magic 80 and return to work**
- **Over 35% of casual staff at SOGH are retired employees**
- **Retire and return to part time postions**





Knowledge Transfer

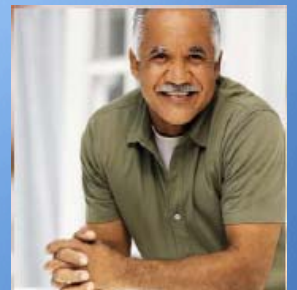
- **Job Shadowing linked with OWL Leaves**
 - ✓ **Two weeks for Front line positions**
 - ✓ **Four weeks for Manger position**
- **Tool kits and guides developed to facilitate knowledge transfer**





Flexible Scheduling

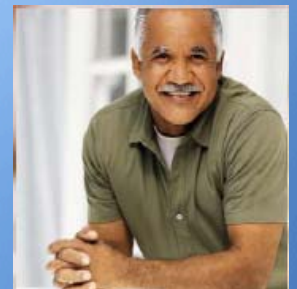
- **Pilot Study to trial compressed work week for designated admin support & front line managers**





Accomplishments

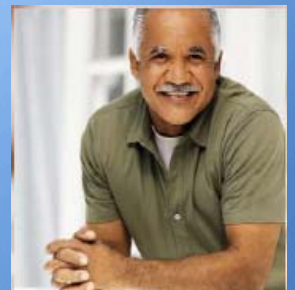
- **Solid foundation – support employees to be healthy & well**
- **Local and national recognition:**
 - Top 100 Employers – 2005, 2006 & 2007
 - Top 10 in Manitoba – 2007, 2008
 - Best Employer for 50+ Canadians – 2005, 2006, 2007, 2008
 - MFA Distinguished Achievement Award – 2005
 - Gold Human Resource Leadership Award – 2004





Retention of Older Workers Project – Next Steps

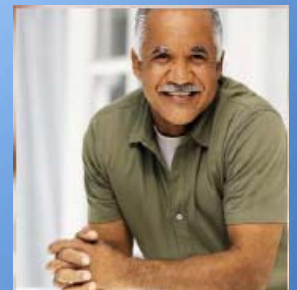
- **Pilot studies in progress**
- **On-going evaluation**
- **Dissemination of project results**





Key Actions

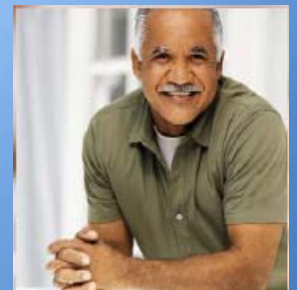
- **Challenge Discrimination and Prejudice**
- **Ensure Respectful Environment**
- **Foster Inclusive Culture**
- **Analyze Workforce and Create Workforce Plan**





Key Actions (Cont'd)

- **Work to Understand 50+ Needs and Interests**
- **Conduct Pilots and Assess**
- **Open Communication Between Company and Employee**
- **Have Topic on the Leadership Agenda**

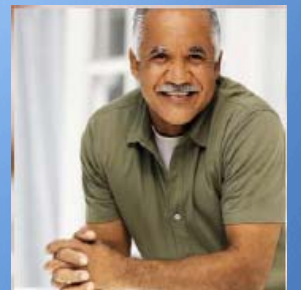




Thoughts to Leave You With

Hiring & retaining the mature worker will be a competitive advantage to keep your talent pipeline full.

Hire and keep the “best and the brightest” – at all ages!





Tools

- Summary notes available at www.qnet.mb.ca
- Contact Eileen Kirton, Vice President, KWA Partners Manitoba, A Division of People *First* HR Services Ltd. at ekirton@peoplefirstkwa.com and/or (204) 940-3906
- Contact Rose Dziadekwich, Project Manager, “Retention of Older Workers”, Seven Oaks General Hospital at RDziadekwich@wrha.mb.ca and/or (204) 632-3371



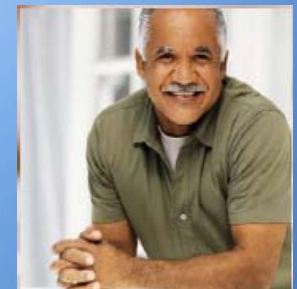


“SHADES OF GREY” THE MATURE WORKFORCE USEFUL RESOURCES

- American Association of Retired Persons. “Perspectives of Employers, Workers and Policymakers in G7 Countries on the New Demographic Realities.” [assets.aarp.org](http://assets.aarp.org/rgcenter/econ/intl_older_worker.pdf). 2007. http://assets.aarp.org/rgcenter/econ/intl_older_worker.pdf
- American Association of Retired Persons. “The Business Case for Workers Age 50+: Planning for Tomorrow’s Talent Needs in Today’s Competitive Environment.” [assets.aarp.org](http://assets.aarp.org/rgcenter/econ/workers_fifty_plus.pdf). 2005. http://assets.aarp.org/rgcenter/econ/workers_fifty_plus.pdf
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- Jaworski, B. KAABOOM! How to Engage the 50-Plus Worker and Beat the Workforce Crisis. Victoria: Trafford Publishing, 2007.
- The Conference Board Inc. “Boomers Are Ready for Nonprofits But Are Nonprofits Ready for Them?” 2007. http://www.conference-board.org/cgi-bin/MsmGo.exe?grab_id=0&EXTRA_ARG=&SCOPE=Public&host_id=42&page_id=1200&query=boomers&hiword=BOOMER%20boomers%20
- The Conference Board of Canada. “Too Few People, Too Little Time: The Employer Challenge of an Aging Workforce.” 2006. <http://sso.conferenceboard.ca/e-Library/LayoutAbstract.asp?DID=1732>
- The Conference Board of Canada. “Work to Retirement Transition: An Emerging Business Challenge.” 2005. <http://www.conferenceboard.ca/>
- The Hong Kong and Shanghai Banking Corporation. “The Future of Retirement, The New Old Age.” 2007. http://www.hsbc.com/1/PA_1_1_S5/content/assets/retirement/2007_for_report.pdf
- Workplace Institute. “Best Employers Award for 50 Plus Canadians.” 2007 <http://www.workplaceinstitute.org/node/28>

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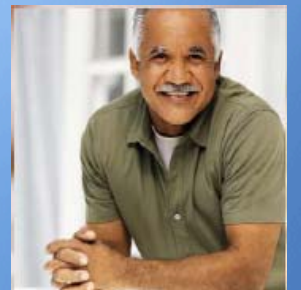




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Organizational Effectiveness
- **Leadership Development**

Details & Schedules at www.qnet.mb.ca

