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%

Major Factors in Decision to Work in Retirement

AARP Working in Retirement Study

- Stay mentally active: 87%
- Stay physically active: 85%
- Be productive or useful: 77%
- Do something fun: 71%
- Need health benefits: 66%
- Help other people: 59%
- Be around people: 58%
- Need money: 54%
- Learn new things: 54%
- Pursue a dream: 32%
Benefits of Mature Workers

Positive traits older workers bring to the workplace

- Experience and qualifications: 90%
- Strong work ethic: 86%
- Loyalty: 79%
- Mentors to other workers: 59%
- Problem solving abilities: 57%
- Ability to work flexible hours: 52%
- Customer service skills: 52%
- Interpersonal skills: 42%
- Other: 4%

% response

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 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

- Physically Inactive
  - HRA #1: 50%
  - HRA #2: 30%
- Smoker
  - HRA #1: 10%
  - HRA #2: 20%
- Overweight
  - HRA #1: 20%
  - HRA #2: 10%
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
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 positions
Knowledge Transfer

- Job Shadowing linked with OWL Leaves
  - Two weeks for Front line positions
  - Four weeks for Manager 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:
  - 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
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


Eileen Kirton
Vice President
204.940.3906
ekirton@kwapartners.com
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  Organizational Effectiveness

- Leadership Development

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