Final Report: 'Older Worker Stories'

Submitted by Trent Applied Social Research Laboratory

Participating Trent Professors: Alan Law, Sociology (PI)[1]
                                    Suzanne Bailey, English Literature
                                    Rory Coughlan, Psychology
                                    Gary Reker, Psychology
                                    James Struthers, Canadian Studies

                                    Date: February 11, 2011

"I think industry today has to be flexible with an older worker. Say, you know what? We'd rather have a piece of you than none of you."

Male 55 Manufacturing Management

---

[1] Please contact Professor Law at 705 748 1011 for inquiries

Tale of Contents

Introduction and executive summary

Introduction

This report presents the main results from the qualitative and exploratory study of of the sustainability of manufacturing and health care workers 55+ in the Peterborough area during 2010. The purpose of the study was to identify and investigate labour market challenges and opportunities confronted by workers at the back end of their careers when work-time is extending, responsibilities are piling up, the public pension is under revision and the job market is under pressure. The main question directing the study was: '**how are people coping, what we can do to help and what more needs to be known to promote the sustainability of a robust senior cohort in the labour force?**' While academic and policy literature is very helpful in framing and understanding some of the issues involved, we sought to begin our inquiry in an open way to lay the foundation for pursuit of how the main domains of inquiry (ageism, health, work/life balance, care giving responsibilities, retirement and pension outlook, and needs for training or education upgrades) interact. Results of the first phase of this study are set out here one dimension at a time (including policy implications and further research directions). Pursuit of interactions between domains as well as expanded focus on each will be taken up as stage two of the research.

Project organization

The study was also designed to maximise participation and roles of community agencies, seniors, students and professors from different disciplines in an effort to locate the set of issues as something we are ALL involved with and have a responsibility to do something about. Many issues have causes that lie beyond local control. However, shared stakes in regional prosperity could help to produce the levels of common contribution needed for accessible action. The study was supported by: a grant to the **Workforce Development Board from HRSDC's New Horizon's initiative** and the **Ontario Trillium Foundation** grant for strategic research initiatives to the **Trent Centre for Community Based Education**. Five **Trent University professors** from Sociology, Psychology, Canadian Studies and English Literature departments provided their design and analytic talents. A team of **Trent University students** transcribed interviews. Community **seniors** assisted with interview design and conducted the interviews held at the University and the Workforce Development Board premises. All of the above stakeholders and others contributed to recommendations from the research findings at a **community roundtable** in December 2010.

The project steering committee comprised an extensive range of policy agencies including:

➢ Alternatives Community Program Services
➢ City of Peterborough
➢ County of Peterborough
➢ Greater Peterborough Area Economic Development Corporation
➢ Injury Prevention, Peterborough County-City Health Unit
➢ Northern Lights Canada
➢ Ontario Secondary School Teachers Federation
➢ Peterborough Alternatives
➢ Peterborough Social Planning Council
➢ Service Canada Centre, East-Central Ontario
➢ Trent Centre for Community-Based Education (Co-lead agency)
➢ Watton Employment Services
➢ Workforce Development Board (Co-lead agency)
➢ Workplace Wellness Program, Peterborough City-County Health Unit

The Trent Applied Social Research Lab provided direct field organization and data preparation. In short, the whole community came together to make this project happen.

Method

The research comprised 37 semi-structured interviews with workers in Health Care and Manufacturing sectors. Recruitment of interviewees was accomplished through advertising in public media, circulation of recruitment notices to key unions and posting of recruitment notices in public areas in Peterborough. The final recruited sample yielded about equal shares of men and women distributed throughout the occupational hierarchy. These sectors are not only 'primary labour market sectors' and show substantial aging characteristics, but also comprise about 40% of Peterborough's workforce (see **Figure One** showing change in employment from 2001 to 2006). Further research will extend the inquiry to retail, rural and other 'secondary' labour market sectors which are characterised by jobs with less attractive features than their primary sector counterparts.

Figure 1: Peterborough Labour force proportionate changes 2001 - 2006
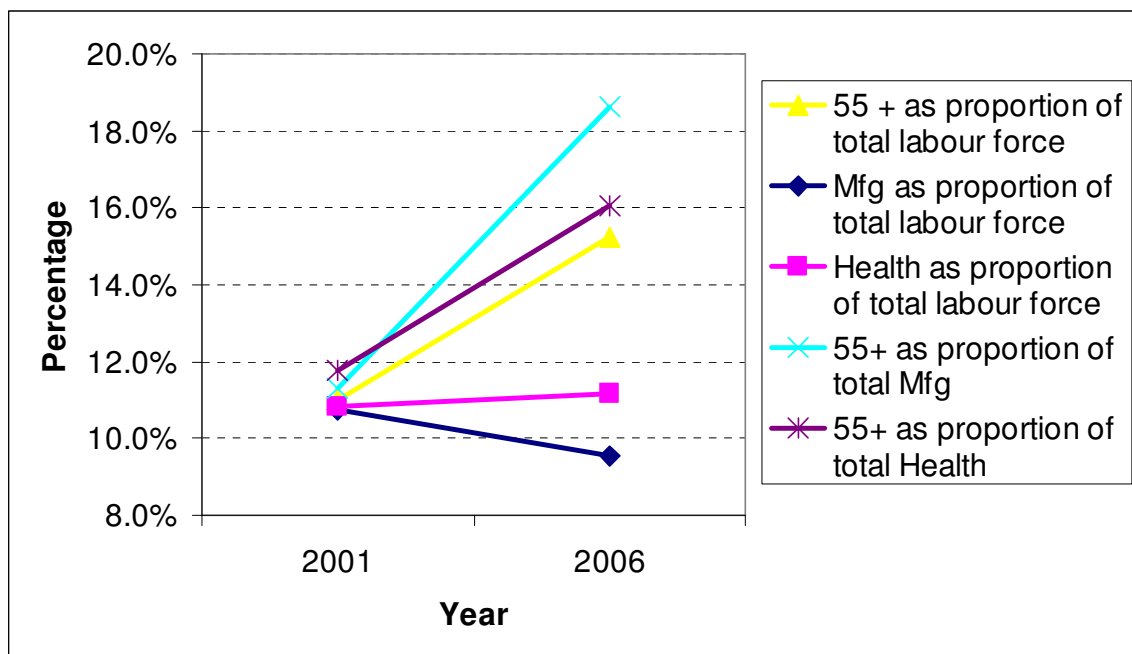
Following a complete work biography meant to sensitise interviewees on the trek to their own seniority, interviews centred on six main topics and results are presented for each:

➢ **Contributions** of aging (inter-generational relations)
➢ **Health** (role of health in handling the present and coping with the future)
➢ **Work/Life Balance** (keeping perspective on the pull of work)
➢ **Care-giving challenges** (the 'care-giving crunch)
➢ **Outlook for pensions** and retirement (resources and readiness)
➢ **Training and education** upgrading (work and non-work related)

The report to follow sets out main results[2].

---

[2] See Attachment 1 for a more detailed version of the main results and Attachment 2 for detailed (verbatim) results of the Dec 15, 2010 Seniors Policy Workshop.

Findings

Overall, we found older workers reported a wide range of sustainability strengths and vulnerabilities much according to size of employer, level of unionization and level of occupation. Not surprisingly, those in relatively protected industry sectors were better prepared for retirement (pensions and investments in place). Perhaps one of the most striking findings had to do with levels of commitment to the region that had hosted their careers and social lives. This showed up not only when discussing workers'desires to give back to the community that had supported them but also in the stoicism they adopted when facing the colossal pressures of care giving, aging bodies and uncertain retirement. Coping strategies are less about shoring up the 'will to work' than about keeping all of the structuring balls in the air – even when they contradict each other. While admirably stoic in their dedication to the identity 'contributor,' some workers, and particularly those at the higher end of the labour market, expressed concerns about not 'letting go' sufficiently to enable other things in their lives as well as an uneasy fit in exchanging strengths with younger generations. Further, the challenges of getting from here to 'there' with strength had a lot to do with the 'there' continuously moving beyond financial reach while workers juggled intensifying job demands, intense care-giving responsibilities and lack of time to wonder "who will I be when I stop"?

Policy suggestions

Policy suggestions tended to centre on four main items:

- ➤ **Build productive platforms** in organizations for meaningful and effective intergenerational exchange of strengths.
- ➤ **Enable small to medium sized businesses** in extending work-structure and financial benefits enjoyed by those in larger agencies with resources to handle what's needed to increase the sustainability of experiential knowledge.
- ➤ **Extend accessibility** of work and non-work related education.
- ➤ **Enable better pension eligibility** for those whose careers have been characterised by part-time work, and particularly women.

Research Directions

The data was extremely rich in implications for further policy research. As the research process deepened, it became clear that the issue 'bundle' of aging in the workforce not only touched on a very broad range of policy domains extending into most aspects of economic and cultural relationships, but that properly targeting knowledge and action would need on-going monitoring devices. The two most commonly advocated were an annual general social survey and an employer agency level survey, both matched with qualitative

components such as interviews and focus groups. In addition, specific research agendas are included with each substance topic below, but are briefly summarised here:

➢ Further quantitative work on care-giving to gauge size and location of problems and qualitative research on retirement and care-giving to shed more light on the human experience of identity shifts.
➢ Further interrogation of work history and contribution results to more deeply analyse shifts in the meaning of work over the career biography.
➢ Identification of barriers for small and medium sized businesses to more fully utilize and enable older workers.
➢ Establishment of a regularized protocol to track shifts in issues and effectiveness of approaches.

An expanded workers' stories project should also focus more explicitly upon intergenerational issues and differences across ethno-cultural communities in this region, including Indigenous peoples, and rural versus urban locales. Of course intergenerationality in the workplace is framed and modified by many other dimensions of experience including (but not limited to); issues of job restructuring and technological change, part-time and seasonal work, caring at a distance, family strategies and family transitions, gender differences in pension coverage and care-giving responsibilities, and the impact of youth unemployment on aging workers' families. These and other intersecting domains will be explored in further research. Further research should also be conducted on an expanded range of industry sectors. The sectors studied here tend to supply reasonably robust work environments. Much more needs to be known about the effects of aging in less well heeled sectors such as retail and agricultural (or more aptly 'rural') work.

The following section contains more detailed summaries of main results, policy implications and research directions.

Presentation of results and next steps

Contribution: Bailey

Overview

Inquiry was directed towards gaining a sense of what people see as their particular contribution to the workplace

"I think industry today has to be flexible with an older worker. Say, you know what? We'd rather have a piece of you than none of you." Male 55 Manufacturing, Management

in terms of the abilities and insights they have developed as a result of their own aging. Older workers offer a wealth of experience and perspective to younger colleagues, for example, in terms of having seen particular work or economic cycles or patterns and terms of dealing with people and patterns in human behaviour. Negotiating the exchange of strengths of technology and insight was seen as the most difficult task to accomplish in absence of mechanisms for meaningful interplay. Informal workplace relations can work well in positive organizational cultures, but reliance on smaller agencies or units can mean the absence of organizational capacity to enable good intergenerational outcomes.

Main findings

Keeping up with technology: The words "keeping up" were common and technology was often referred to. Create anxieties? Create tensions between workers?

Keeping up stamina: Some workers make unfavourable comparisons to the past and may think of retiring. Others find creative ways of adjusting.

Losing possibilities: Older workers face concerns about how others perceive their effectiveness - and their value as the time they have left in the workforce decreases.

Gains in experience: A rich skills set come with age and experience.

Gains in perspective and mentoring: Older workers are the keepers of workplace "memory." Having seen cycles, they can put things in perspective. Reserves of calm and positive thinking are possible.

The disconnect with younger workers: Sometimes tension emerges in people's thinking about younger workers. Workplace culture can create resentment towards new or younger workers.

The need to value and validate – the need for flexibility: Does a lack of workplace or employer flexibility lead older workers to retire early? If some of the concerns of older workers about keeping up / keeping positive, were met, would people stay on longer?

Older Workers are valued/valuable: Workers who report feeling valued are more likely to talk about positive workplace interactions and relations with younger workers.

Summary of policy suggestions

Seniors community policy workshops suggested ageism in the workplace needed to be addressed by creating marketing campaigns to highlight the positives of intergenerational relations and by creating concrete platforms for intergenerational mentoring. Municipal, provincial or federal agencies could play roles in promoting inclusivity of strengths in the workforce.

Research directions

Continued research should be aimed at:

➢ how older workers **perceive their own strengths**, or do they see themselves as having such strengths,?
➢ whether they see these abilities or perspectives **appreciated or understood** in the workforce, and
➢ whether they have been able to negotiate **workplace cynicism**, for instance, or find a positive way of constructing their own aging.

Research should be directed toward discovering means to configure aging as strength and as a benefit in the workplace, while recognizing the particular challenges faced by older workers and without constructing new clichés about aging. What insights do older workers have about ways employers can benefit from the contributions and presence of aging workers? What changes or strategies would they like to see used in the workforce as a way of capitalizing on the skills and insights of this particular demographic?

In developing more detailed questions for workers, research should develop evidence of the social construction of aging, particularly as it is represented through metaphor and other linguistic devices. How does each worker 'tell' about the self and about this particular stage in his/her life? How does work fit into individual life-stories and how does age figure in narratives of self constructed by individual workers?

Health: Reker and Coughlan

Overview

The research results to date concerning older workers' experience of health shows that while some are

"I'm allergic to alcohol …they brought it in to wipe the parts down, I says "I'm allergic to this stuff." …"Well it'll only be two weeks." …eight months later I lost all my sinuses."
Female 55 Manufacturing, Blue Collar

coping with expected minor and occasional chronic ailments, that in many ways they adapt and maintain their identity as valuable members of the working community. The results reinforce findings in epidemiology and the determinants of health literature by highlighting the divide between upper income and management employees, who experience little or no health problems, and those in less well remunerated and blue-collar occupations experience decline but have developed strategies towards maintaining their employed status and a positive outlook. Strategies encountered include comparing themselves favourably to others less well off, taking preventative measures, developing positive life-style approaches, adapting the work to their abilities and seeking support from colleagues and employers. These are all in some way linked with the maintenance of healthy social relationships in the work environment and in particular with pro-social adaptive management styles. In this regard, all work situations are not equal and stress is experienced by older employees who are coping with declining standards of training and increased productivity pressure in less responsive workplaces.

Main findings

Anticipating and coping with declining health status: Older workers identified minor health problems but these did not hinder them nor limit them in any significant way. Workers simply acknowledged and accepted the minor irritations and went on with their work. They managed to retain their work role identity in spite of declining health.

Making favorable comparison: Older workers indicated that they don't dwell on their aches and pains because there are always others who are not doing as well or who have a lot more on their plates.

Compensating for limitations – self reliance: Older workers rely on a variety of different coping strategies to deal with their health limitations. Subthemes may be seen as routines to manage good health in the workplace environment:
  o Taking preventive measures
  o Adopt positive lifestyle habits
  o Monitor the work situation

o   Accept the limitations and make the best of it.

Compensating – support from employers and/or co-workers: Older workers rely on and receive social support from co-workers, either in terms of maintaining a "common" positive attitude   among co- workers or through direct assistance from co-workers with the demands of the job.   Some workers reported receiving assistance from employers who offset declining physical health by providing appropriate tools and equipment. Some employers seem to be better than others at providing an "enabling workplace environment."

Sources of stress in the work place: In terms of mental health in relation to one's ability to work, interviewees identified a number of sources of stress in the work place.
o   Not having enough time to get the work done
o   Eroding standards
o   Demands of the work environment
o   Lack of co-worker experience with the job.

Few or no health problems: Interestingly, few or no health problems were reported primarily by upper level health and manufacturing sector workers compared to their lower level counterparts.

Summary of policy suggestions

Seniors community policy workshops suggested turning the policy focus on age discrimination and the multigenerational workplace. WSIB/Illness and injury prevention agencies could promote results of cost/benefit analysis as well as structuring worker/employer accommodations in a win-win manner instead of an adversarial manner.   Continuation of health benefits beyond retirement would also help take a good deal of fear from the prospect of post-retirement aging. Given the increase in demands on workers in their mid-late 50's, expansion of mental health benefits could help reduce costs later. Work standards are changing along with technology and new market conditions and they need to be adapted with the 'sustainable' worker in mind.

Research directions

Given these findings, the next phase of the research cycle should attempt to further explore the characteristics of both healthy and problematic workplaces and their approaches to late career experiences through individual interviews, but more importantly the socio-economic determinants of a healthy social work environment and best management practices that encourage adaptation to aging employees. In this regard we wish to investigate various differing sectors of the

workplace by means of convening focus groups of older workers with similar demographics to discuss healthy and adaptive workplaces and management styles, followed by survey research to find out 'size', 'extent' and industry sector density of main problems. Focus groups could also be held bringing employees, management and government policy specialists together to trouble-shoot the issues raised, with a view to identifying workable and cost effective responses.

Work/Life Balance: Law

Overview

Work/life balance was best for workers who made conscious decisions to keep things in perspective and particularly for those in public sector organizations. For many however, the

I enjoy my work. I'm passionate about it. I like it. It's stimulating. I'm well respected in what I do. I'd just like to have a little more personal time … Thursday night men's hockey league when you're never there … those kinds of things are things you can't buy back."
Male 55 Manufacturing, Management.

importance of the identity 'worker' tended to take over all of life leaving people vulnerable to a sense of meaninglessness when work stops at retirement or layoff.

Main findings

Volunteering: Keeping busy contributing when the kids are gone – a life long ethic, and particularly for women.

Flexible workplace: Good flexibility at work to manage work/home demands mostly maps to the health care sector, but is mainly a function of organizational size. Ease of movement in and out of the labour force helped family engagement and pacing of intense work involvement. Workers prefer structured time due to higher predictability.

Switching off: Can't switch off - takes work home, can't take holidays for fear of slipping behind – competitive and team pressure. Having children as a priority helps to keep perspective. Competition at work in health Care sector is not as intense.

More time off would be better: Loves the 'action' at work, but understands there's more to life.

Self at the steering wheel: The pressure is always there to do more but realization of mortality helps perspective.

Summary of policy suggestions

Transitions to retirement could involve expansion of ways to think of the 'self' beyond 'worker'. The seniors community policy workshop suggested expanding the range of employment structures to accommodate part-time work (without an erosion of benefits), extend relationships into the volunteer community to add professional values there or do something completely different. Facilitating such transition enablers could involve establishment of communal housing options (e.g. "Mingles") as well as supports for smaller organizations to handle variable work schedules and expansion of personnel.

Research directions

The work/life balance dimension yielded multiple directions for new and useful research. These include: identification and mitigation of factors causing 'workaholism' (including focus on the structure of competitive workplace relations) and identifying the effectiveness, gaps and workable strategy to address employer barriers to expanding work structure options.

Care giving: Struthers

Overview

The image of a "sandwich generation" aptly describes the challenges faced by many of our interviewees, aged 55 to 65, who find themselves caught between the

"Both my parents became very ill. So I had to quit my work...and take care of them. I loved that work...but you had to make a choice"
F 63 Health, Lower White Collar

demands of caring for their aging parents and/or disabled spouses or adult children. Asked to comment on how these responsibilities influenced their own plans for retirement, our participants spoke frankly about a range of concerns. For some, most frequently women, caring for an aged parent meant choosing part-time rather than full-time work in order to find the time to provide the care which was required, leaving people vulnerable on pension eligibility.

Main findings

Lost time, lost jobs: Caring for aging, frail parents demands proximity and time. Workers shifted from full to part-time work, relocated or left jobs altogether in order to create time to give care. Women far more often than men made these choices.

Parents move back in: Moving into a parent's home, or moving parents into your own home, was a strategy for ensuring that chronic health needs could be met, especially during end-of-life care.

Caring for spouses: Caring for disabled spouses was a worry for aging workers. Lost time shrank wages for themselves and their partners, impacting joint pension income in retirement.

The kids aren't alright: Caring for adult children in a troubled economy is also a concern. Children can come home with income and health issues which demand time, worry, and care, and which may affect retirement plans.

Stress, guilt, anxiety, exhaustion: Guilt, stress, anxiety, and exhaustion were common responses to questions about how the needs of elderly parents impacted on the lives of aging workers.

Siblings: Brothers and sisters could be a godsend or a curse in coping with the care needs of aging parents.

Caring at a distance: The distance frequently separating children from aging parents who needed help was a source of lost time and much anxiety.

Supportive and unsupportive workplaces: Whether or not an employer was supportive or dismissive of care giving obligations was critical to the stress and financial hardship faced by aging workers.

Satisfactions of care giving: Despite the challenges of providing care to aging parents, there was pride in having done it.

Summary of policy suggestions

Seniors community policy workshop participants suggested that much greater work schedule flexibility is needed in order to accommodate care-giving responsibilities which are ballooning for workers 55+. Workplace policies should be truly gender neutral not just 'lip service' in order to address the stark burden that falls on women. Tax credits for care giving could be introduced to offset the costs. Contemporary technology (e.g. 'skype') could be helpful in enabling care-giving to be done at a distance.

Research directions

Research on the care giving 'crunch', while making heavy use of national census data, has been more qualitative and has also relied more extensively on

community-based research. More survey research is needed to gauge the *extent* and *depth* of problems identified as well assess the outcomes of strategies.

Retirement and pensions: Struthers

Overview

For those in public sector employment (dominant in the Health Care sector) retirement is generally looked forward to and for all the right reasons. For others

"I can't honestly say even if I hit 65 that I would be able to retire...For me, the sad part is that I can't even think about when I could retire. There's no savings there to retire on."
Female 58 Health, Nurse

though, retirement is either very far off or is looked at with trepidation: how will I survive on an inadequate CPP? Will there be anything left of my body to enjoy things after an over-extended working life? How will I cope with all the care giving responsibilities I have when I have to struggle to survive myself?

Main findings

I can't even think about retirement: For many workers age 55 plus, thinking about retirement isn't an option. Few savings, no private pension, and too much debt make retirement a distant option.

Different perspectives on health: Health worries many workers who are deciding when to retire.

No employer pension: The most common fear about retirement is the lack of a private pension to supplement OAS-CPP. Differences between workers in the public and private sectors are starkest on this question.

Good retirement income, lots of options: For those with good jobs, excellent pensions, and investments, retirement can offer many options.

Part-time work means part-time pension: Women, more of whom worked part-time for some or all of their careers, may have little or no pension income apart from OAS-CPP.

I'm looking forward to free time: After years of working hard, with not enough free time, many workers relish the prospect of retirement as a chance to finally do what they want.

Will I be bored?: Others fear having too much time on their hands, and have difficulty imagining life outside of their job.

Summary of policy suggestions

Seniors and community policy workshop participants mostly pointed to pension reform that enabled better outcomes for part-time workers and those with non-standard biographical work profiles.

Research directions

In recent years there has been a significant growth of research on and public policy debate around the issue of pension inadequacy, especially for workers in the private sector (where less than 25% are members of registered pension plans); and the care giving 'crunch' faced by members of the 'baby boom' cohort now heading into retirement, whose parents are in their eighties. While valuable, much of the research on pension policy has been quantitative, rather than qualitative, in methodology, and focused on measuring the scope and sectoral location of the pension 'gap' rather than its subjective experience in the lives of aging workers. Qualitative research can point to more nuanced policy options that enable people to adopt retirement 'profiles' which have a better chance of meeting individual needs than 'categorical' approaches can possibly deliver.

Training and education upgrading: Law

Overview

Workers at professional levels in the health care sector are well supported with continuous training to stay on top of job

If I take a course and upgrade my skills for a year I'm 63. Who's still going to hire me?
Female 63 Manufacturing, Lower White Collar

demands. However, retraining to switch occupations remains a bridge too far for many (mostly time and money) and some employment advisors point to the short 'return' on investment. On the other hand, one respondent reported that she was snapped up before graduating from her career switch course, *because* she was not only trained but also had a good track record of productivity and commitment to her employers. Most mentioned 'top-up' courses in basic 'new technology' but if a serious investment were to be made in education, it would be for something of personal and deeper interest such as a philosophy or music course at university.

Main findings

Employer provides good opportunity for continuous learning: The health care sector provides good support for continuous learning – particularly for skilled professionals.

Experience more important than new knowledge for some – not for others:
For many, there labour market niche is 'stock of experience' not new knowledge. Others feel the pinch of dated technology skills.

Not enough longevity left in the labour market: Time leftover to make use of newly acquired labour market skills is considered a limiting factor by some… others are undaunted and match new skills with their experience.

Courses for fun: time and money the biggest prohibitive factor: Most workers wanted to do something 'non-work' oriented – that they've always wanted to do, but the resources just are not there.

Summary of policy suggestions

Policy suggestions cantered on expansion of workplace delivered 'tech/ courses, but also pointed to possible roles that higher education could play in conjunction with flexible work structure (full-time to part-time) to ease into the condition where time is under more control and identity is not welded to the workplace.

Research directions

Two main research directions include examining post-retraining job results to test the negative job councillor view of things and also to examine roles that higher education can play in extending non-occupational opportunities.

Attachment 1: Findings with supporting material

Contribution: Bailey

Keeping up with technology

The words "keeping up" were common and technology was often referred to. Create anxieties? Create tensions between workers?

"I don't know if this is reflective of a general trend, or just a particular niche I seem to have fallen into but there are many people running uhm, organizations and they are not up to date in technology, they uhm, they, can't necessarily understand when a younger person tries to explain it to them."
F 56 Health lower

"in the '50s, I mean, there were parts you could take from a motor and you could throw it against a wall and it would stick and the motor would work. Now, everything is diagnostic. Everything is modular."
M 60 Manufacturing professional

Keeping up stamina

Some workers make unfavourable comparisons to the past and may think of retiring. Others find creative ways of adjusting.

"So I do get this feeling that the job is not being done maybe as well, when I'm getting a little older. And so I'm sort of pulled between the idea of retiring … and staying on until I'm at least 65... I have my own goals and objectives for that job and I'm thinking I'm not able to keep up with them as much as I did when I was in my 40s and 50s. ... But I think, again, I'm very comfortable with the age I'm at."
F 63 Health lower

"Sure, you start to slow up, but that doesn't mean you can't do the job. You just, you just find better ways of doing it and that's, that's what I've learned."
M 62 Manufacturing management

Losing possibilities

Older workers face concerns about how others perceive their effectiveness - and their value as the time they have left in the workforce decreases.

"To be quite honest, I'm having a real hard time getting older. I feel like my world has narrowed down and I don't have, I don't feel that I have the freedom just to

leave the job because I think I can get another job, because of my age. I think would people look at me and think well, why would we hire her? She doesn't have many years left."
F 59 Health management

Gains in experience
A rich skills set come with age and experience

"What I do and what I can achieve, um, you can't be taught. You know, a young person coming out of college, we bring them along every year, but I mean, the ah, the school of hard knocks, the experience, it just is something that only comes with age, you know."
M 55 Manufacturing management

Keeping up stamina

Some workers make unfavourable comparisons to the past and may think of retiring. Others find creative ways of adjusting.

"So I do get this feeling that the job is not being done maybe as well, when I'm getting a little older. And so I'm sort of pulled between the idea of retiring … and staying on until I'm at least 65... I have my own goals and objectives for that job and I'm thinking I'm not able to keep up with them as much as I did when I was in my 40s and 50s. ... But I think, again, I'm very comfortable with the age I'm at."
F 63 Health lower

"Sure, you start to slow up, but that doesn't mean you can't do the job. You just, you just find better ways of doing it and that's, that's what I've learned."
M 62 Manufacturing management

Losing possibilities

Older workers face concerns about how others perceive their effectiveness - and their value as the time they have left in the workforce decreases.

To be quite honest, I'm having a real hard time getting older. I feel like my world has narrowed down and I don't have, I don't feel that I have the freedom just to leave the job because I think I can get another job, because of my age. I think would people look at me and think well, why would we hire her? She doesn't have many years left."
F 59 Health management

Gains in perspective and mentoring

Older workers are the keepers of workplace "memory." Having seen cycles, they can put things in perspective. Reserves of calm and positive thinking are possible.

"Yeah sometimes I, well, um, sometimes there's a sort of, you know, been there done that, we did that once before, you know. Things go around, 'Now we're going to visit all new moms. Now we're not going to visit all new moms for five, ten years. Now we're going to visit all new moms.' You know, there's sort of, the, that sort of, you think, 'Oh my goodness.' ... I like to revamp things, but I seem to want to add on but not throw things out."
F 61 Health Nurse

"I find that I'm not as much as I think I'm running a lot I feel like I've slowed down a bit. That I don't get quite as excited and upset at what's going on in life I can usually put things in perspective ... I feel like I have an inner strength that I didn't realize I had... But it's amazing how when you have to do things and you do it and it's just fine. Things work out."
F 58 Health blue collar

The disconnect with younger workers

Sometimes tension emerges in people's thinking about younger workers. Workplace culture can create resentment towards new or younger workers.

"They don't get it yet.... They don't get it until they're older."
F57 Health (alt) professional

"You know, I do feel that there's more opportunities for younger workers. Those are the ones that get recognized, they get, um, training opportunities, the older worker doesn't seem to, to be, uh, first in their mind to, to move forward on, you know, any learning opportunities, or, or job promotions."
F 57 Manufacturing lower

The need to value and validate – the need for flexibility

Does a lack of workplace or employer flexibility lead older workers to retire early? If some of the concerns of older workers about keeping up / keeping positive, were met, would people stay on longer?

"So then what happens is um, you lose really quality high-grade people like me, only because they can't deviate from the norm. If I could give this survey anything to buy into on people who are currently in the workforce, I think industry today has to be flexible with an older worker. Say, you know what? We'd rather have a piece of you than none of you. What is it going to take to keep you, because you're valuable and, and you can teach the younger people and so on and so forth."
M 55 Manufacturing management

Older Workers are valued/valuable

Workers who report feeling valued are more likely to talk about positive workplace interactions and relations with younger workers.

"They treat me as a peer. Especially the younger guys coming in now. They'll come and ask me a lot of questions. And if I don't know I'll tell them. I'm quite frank about if I don't know something I'll, no idea." …"I've always loved, in my other job I always taught a lot of, I enjoy teaching people."
M 57 Manufacturing professional

Health: Reker

Anticipating and coping with declining health status

Older workers identified minor health problems but these did not hinder them nor limit them in any significant way. Workers simply acknowledged and accepted the minor irritations and went on with their work. They managed to retain their work role identity in spite of declining health.

"Ah, my health is, is fine in terms of my ability to work. Um, I'd certainly like to be ah, healthier. I've got, you know, multiple little things, as I think most people do as they get older um, that kind of put a kibosh on some things that you want to do."
F Health management

Making favorable comparisons

Older workers indicated that they don't dwell on their aches and pains because there are always others who are not doing as well or who have a lot more on their plates.

"I don't. I don't dwell on my aches and pains. There's always somebody worse off than I am, you know. I just keep going. If it gets real bad, I'll go to the doctor's. There isn't anything he can do anyway. So, you know, just learn to live with it."
F Health lower

Compensating for limitations – self reliance

Older workers rely on a variety of different coping strategies to deal with their health limitations. Subthemes may be seen as routines to manage good health in the workplace environment.

Taking preventive measures
"Um, really not too much, a little bit of blood pressure once in a while, but that can be looked after with, uh, drinking lots of water, and diet and, uh, taking high blood pressure medication, which I'm on a very light medication."
M 55 Manufacturing blue collar

Adopt positive lifestyle habits
"I can walk... to work. And at my lunch hour I walk...So my arms are swinging, they're already, you know, I'm breathing and I'm already looser....And I do a little walking meditation before I even get there."
F 59 Health lower

Monitor the work situation
"I did. Yes I, I had ailments to the point that, uhm, I was on a disability pension....Well, yes. I, I, have some medication and it is an expense. ..Yeah, I just have to again draw that line between uh, how much do I take on before I jeopardize my health and end up in the same position I was before. "
F 59 Health lower

Accept the limitations and make the best of it
"I don't like people to see me kind of straining to look at something. That would bother me... Losing, I mean, losing my vision or it deteriorating would be awful, but the job part of it, I could handle."
F 63 Health lower

Compensating – support from employers and/or co-workers

Older workers rely on and receive social support from co-workers, either in terms of maintaining a "common" positive attitude   among co- workers or through direct assistance from co-workers with the demands of the job.
Some workers reported receiving assistance from employers who offset declining physical health by providing appropriate tools and equipment. Some employers seem to be better than others at providing an "enabling workplace environment".

Receive support from employer
"Um, well, I'm pretty lucky in that respect um, in being healthy. My only real problem is vision...they provided me with a bigger screen and since that time, everybody else has gotten one, too, because they realized that the screens were too small."
F 63 Health lower

Little or no support from employer
"I'm allergic to alcohol, uh, I cleaned …uh, [clears throat] they brought in to wipe the parts down, I says "I'm allergic to this stuff." …"Well it'll only be two weeks." …eight months later I lost all my sinuses. I talked to a plant manager, I talked to human resource manager, they come back: "you go to your allergist and have them come back with a certificate that you have this allergy." And then six months later they said …they voted it down. No they're not going to ban it, they can't do that."
F 55 Manufacturing blue collar

Sources of stress in the work place
In terms of mental health in relation to one's ability to work, interviewees identified a number of sources of stress in the work place.

Not having enough time to get the work done
"The reality is that they don't have enough time. They don't have enough uh, time to do the best job."
F 57 Health Nurse

Eroding standards
"With my, well, it, maybe with my work is not fair enough to say it's kind of with the whole picture. It's just that the way nursing is now... I worry that, that things are going to go wrong. And that's there's not, the standard isn't there like it used to be there....I see it as a rationalization. They rationalize it to what it now is.

And, and, that's the standard. I worry about that... And the way, the education around nursing right now. What's being produced. "
F 57 Health Nurse

Demands of the work environment
... there's zero tolerance but you know, you used to have to sort of grin and bear it when the patient hit you or punched you and it all came under well they were, well it was drug induced or they're senile or whatever... We don't have to take the verbal abuse from patients. And still you know, people are reprimanded for it. It's not, it's not fair yet. It may never be fair but it's really slowly catching up."
F 57 Health Nurse

Lack of co-worker experience with the job.
"And I see that they don't have the experience... experience is really key... It's very hands on. And academically you can know it, I knew lots of stuff as a diploma nurse but unless you're gonna, you're going to implement it and use it you know, you lose it."
F 57 Health Nurse

Few or no health problems

Interestingly, few or no health problems were reported primarily by upper level health and manufacturing sector workers compared to their lower level counterparts.

"No, nothing. Oh I used to hurt, I hurt my back a couple times, when I was lifting baggage...I had mono once when I was working, that was years and years ago, I was off about three weeks. But nothing, nothing major, other than that. I used to book off once a month just for the heck of it."
F 57 Health professional

"I've worked in business for thirty years I've never sick been sick a day...I mean I take medication for high blood pressure. But other than that. Never been sick a day."
F 64 Manufacturing management

Work/Life Balance: Law

Volunteering

Keeping busy contributing when the kids are gone – a life long ethic and particularly for women.

"I'm not a grandparent. My kids haven't settled down and I'm trying to imagine waking up each day with, but I would do a lot of volunteer work, I know that. Yes. Um, there's so much to be done in the community. I mean, I already do some volunteering at church and other things, too, but there's a lot, a lot of niches to be filled."
F 61 Health nurse

"Like, I've just volunteered now, too, with Hospice. Um, I'm just doing the training course with them so that I can do, because I don't have contact with um, any organization and elderly people. And I have a nice old lady I went shopping with on Saturday. She lives in um, Keele."
F Manufacturing white collar lower:

Flexible workplace

Good flexibility at work to manage work/home demands mostly maps to the health care sector, but is mainly a function of organizational size.

"So yeah, this place is, it's actually an excellent place to work, or it's a good agency and we've had excellent managers who are very, you know, understanding and, you know, family friendly sort of. Well of course, that's one of our initiatives is trying to make family friendly work places."
F 61 Health white collar nurse

Ease of movement in and out of the labour force helped family engagement and pacing of intense work involvement.

"I wanted to go back just part time was because I still wanted to be available for them. So, that's not so bad. You know, I mean, perhaps that's a luxury for me and my children that I can do that. .. I'm better off than them that way you know. I'm not as uh, worn out by it all and as cynical."
F 57 Health Nurse.

Prefer structured time due to higher predictability

"Like there's two individuals in our office that abuse the system totally. And I've lost my temper at both of them. That's interesting. Yeah. Because, you know, we often, people often think, oh flex hours would be great. But uh, some employers are very structured, you know, eight thirty to four thirty or whatever or eight till five and, and uh, but uh, it uh, hasn't always been that way. No, no, back in the eighties it was like. Punch a clock. Maybe four thirty and punch a clock and that was it. Yeah Even when I was salary it was eight to four thirty. You know. And so, uh. Which was, it was structured so I think it was great."
M 57 Manufacturing management

Switching off
Can't switch off. Takes work home, can't take holidays for fear of slipping behind – competitive and team pressure.

"So that I'm not too swamped when I get back because no one does my job while I'm gone. Um, so yeah, it's, I don't really like to leave because there's going to be so much work coming, um, but there's never enough to have it off….I would like to take the time off because I know I need it. I mean, I've just tried to splice out my holidays for the year and ah, they've already come back and said well, we have to balance our time off with all the other senior managers."
M 57 Manufacturing management

Having children as a priority helps to keep perspective and competition at work in the health Care sector is not as intense.

"I don't work any more than I have to. I'm willing to work if, you know, if there's a special project that needs doing, I, you know, and I do volunteer to write, we have child sponsorships. So I volunteer to write the profiles for that program. So, but I try and, because I've got two grandchildren as well, I, they're my priority and when I go home, I don't worry about work or think about work."
F 59 Health management

More time off would be better

Loves the 'action' at work, but understands there's more to life.

"Probably the best way to summarize my scenario, may be different than many is, I enjoy my work. I'm passionate about it. I like it. It's stimulating. I'm well respected in what I do. I'd just like to have a little more personal time … Thursday night men's hockey league when you're never there. Yes. So rather than let the team down, I would say, you know what, I just can't sign up because, and I miss that and I probably have some regrets, you know, because those kinds of things are things you can't buy back."
M 55 Manufacturing management

Self at the steering wheel

The pressure is always there to do more but realization of mortality helps perspective.

"No time for anything else, no social life, no hobbies anymore, hobbies I used to do and that kind of thing had to give everything up. Is it worth it? And then when I got the heart problem and everything else, then I knew it wasn't worth it."
M 58 Manufacturing blue collar

"But at 62, I feel you should be able to do that because leisure time is very important, especially now when you um, hear of people, you know, dying so young."
M 62 Manufacturing management

Care Giving: Struthers

Lost time, lost jobs.

Caring for aging, frail parents demand proximity and time. Workers shifted from full to part-time work, relocated or left jobs altogether in order to create time to give care. Women far more often than men made these choices.

" Both my parents became very ill. So I had to quit my work...and take care of them. I loved that work...but you had to make a choice"
F 63 Health white lower.

Parents move back in.

Moving into a parent's home, or moving parents into your own home, was a strategy for ensuring that chronic health needs could be met, especially during end-of-life care.

"They lived with us for six years...My mother was quite distraught at the prospect of...losing my father...Now, since my dad has passed away, [she] is having a very difficult time."
M 60 Finance Management.

Caring for spouses

Caring for disabled spouses was a worry for aging workers. Lost time shrank wages for themselves and their partners, impacting joint pension income in retirement.

"With my husband falling apart too, it's a little worrisome financially and physically, how am I going to do this?...We need two incomes."
F 57 Health management

The kids aren't alright: caring for adult children

In a troubled economy, children can come home with income and health issues which demand time, worry, and care, and which may affect retirement plans.

"My son is a huge problem right now...We don't know if [he] will every support himself...We don't have pensions, neither of us...So, I'm thinking, 'Can I afford to quit?' He may end up back home any time."
F 61 Health white collar Nurse

Stress, guilt, anxiety, exhaustion

Guilt, stress, anxiety, and exhaustion were common responses to questions about how the needs of elderly parents impacted on the lives of aging workers.

"I keep thinking they're getting close to the end and I need to be there for them....I feel guilty thinking here I am out in a long term care helping all these other people, when my own family needs me there in Toronto."
F 58 Health blue collar

Siblings: Brothers and sisters could be a godsend or a curse in coping with the care needs of aging parents.

"Thank goodness I have four other siblings so we'd all take turns trying to take care of mom and dad." F 58 Health Blue.

"My mother is three hours away. There is...a brother, about fifteen minutes from her, but he's not... active in any of...her needs or care...He's just not available." F 57 Health & manufacturing lower white collar

Caring at a distance

The distance frequently separating children from aging parents who needed help was a source of lost time and much anxiety.

"My dad passed away a year ago and he was in Toronto most of the time...so there was a ton of driving back and forth...I don't know how people would do it if they were full time."
F 61 Health white collar Nurse.

Supportive and unsupportive workplaces

Whether or not an employer was supportive or dismissive of care giving obligations was critical to the stress and financial hardship faced by aging workers.

"My husband...had cancer and...I had to go with him to Toronto...but I just had to use holidays...I did actually find out since then that some people take that as compassionate time, but I didn't know that and nobody said anything about it."
F 63 Health white collar lower

Satisfactions of care giving

Despite the challenges of providing care to aging parents, there was pride in having done it.

"I think that's it's made me a better person...The whole experience has been very rewarding...It's made me...better prepared to face the challenges in my later years for sure...I'm very comfortable with that part of the end of life."
F 63 Health white lower

Pensions and Retirement: Struthers

I can't even think about retirement

For many workers age 55 plus, thinking about retirement isn't an option. Few savings, no private pension, and too much debt make retirement a distant option.

"I can't honestly say even if I hit 65 that I would be able to retire...For me, the sad part is that I can't even think about when I could retire. There's no savings there to retire on."
F 58 Health Nurse

Different perspectives on health

Health worries many workers deciding when to retire.

"Part of the reason I'm looking to getting out this coming May is…I had a second quadruple bypass…so I'd like to just go out and play…and do what I can."
M 63 Health Nurse

"I have…a big medication bill every month…which the company pays for right now, but when I retire, how am I going to handle that?"
M 58 Manufacturing blue collar

No employer pension

The most common fear about retirement is the lack of a private pension to supplement OAS-CPP. Differences between workers in the public and private sectors are starkest on this question.

"No, I never really earned enough…My husband, he's on CPP Disability…so he was out of work at the time, so I didn't contribute to the pension. He's been at home ever since."
F Manufacturing lower white collar

Good retirement income, lots of options

For those with good jobs, excellent pensions, and investments, retirement can offer many options.

"My wife and I will enjoy…the CPP and the OAS at 65. I've been fortunate enough to invest wisely…and we've made some money in real estate and…in the stock market…If I find I'm bored and I need to work it will be for stimulation and interaction. It won't be… economics."
M 55 Manufacturing management

Part-time work means part-time pension

Women, more of whom worked part-time for some or all of their careers, may have little or no pension income apart from OAS-CPP.

"Well, while I was raising my children, I only worked part-time, 4 hrs a day, and we weren't allowed to be in the pension plan…And my husband doesn't have a pension at all, so we'll both have the Old Age Pension and the CPP."
57 Health management

I'm looking forward to free time

After years of working hard, with not enough free time, many workers relish the prospect of retirement as a chance to finally do what they want.

"Just to have free time, I guess to do volunteer work and not have to worry about working and running and running. I just feel like I'm on the go all the time, that I really don't have time to do the things I want to do."
F 58 Health blue collar

Will I be bored?

Others fear having too much time on their hands, and have difficulty imagining life outside of their job.

"I get a lot of stimulation out of the work that I do, the interaction with employees, with customers, and all that. And I guess if I have a concern about retirement it is how I'm going to miss that stimulation and how big a void is it going to leave?"
M 55 Manufacturing management

Training and Education: Law

Employer provides good opportunity for continuous learning

The health care sector provides good support for continuous learning – particularly for skilled professionals.

I think we're, when opportunities come up and if the funds allow, I get whatever training I want which is great. F 57 Health management

Experience more important than new knowledge for some – not for others

For many, labour market niche is 'stock of experience' not new knowledge. Others feel the pinch of dated technology skills.

There's going to be opportunities there [retirement homes] for me to get positions in management and whatnot, because with my experience people do, when I send them my resume, they're on the phone to me immediately.
F 58 Health Nurse

People who ah, get out-placed at work, I can see the first thing they would want to do is pick up their computer skills … [but] I'm just so busy at work that I can't take the time.
M 55 Manufacturing management

Not enough longevity left in the labour market

Time leftover to make use of newly acquired labour market skills is considered a limiting factor by some… others are undaunted and match new skills with their experience.

I've, looked at going back to school. I spoke with uh, counsellors and, essentially they just said you know, with somebody in your position, the odds of you graduating from say a community college program and getting gainful employment aren't all that great.
F 56 Health lower white collar

You know if it... if I take a course and upgrade my skills for a year I'm 63. Who's still going to hire me?
F Manufacturing lower white collar

In school, and working. I just got hired. I'm working part time learning the job, and then in June when I graduate I have a full time job. F 55 Manufacturing white

Courses for fun: time and money the biggest prohibitive factor

Most workers wanted to do something 'non-work' oriented – that they've always wanted to do, but the resources just are not there.

Well, the dilemma is when you're working, you haven't got the time to do that, and when you're not working, you don't have the money to do that. So that's where you come to.
F Health management

Attachment 2: Facilitation session with Peterborough seniors

Contribution

Summary

➢ Empower the baby boomer generation to make positive change.
➢ Address ageism in the workplace:
  • Address workplace harassment
  • Marketing campaign
  • Create mentoring platform and teach mentoring skills
➢ Role of municipal, provincial an federal governments in public policy?
➢ Promoting inclusivity
  • an inclusive community all backgrounds.
  • all ages – promote respect

Detailed flip chart notes

➢ May be able to contribute experiences of his own and others.
➢ If no skills to move to new goal or job, resources are needed to help people move on/change, transition.
  • Where will $ come from?
➢ Need to adapt lifestyle to accommodate change to meet individual needs.
➢ Interested in 'whole life' story
  • This group more holistic.
➢ Social justice – see things from different points of view.
➢ Need to show stories of the people 50+ - what is the meaning of life & experiences?
➢ Experiences of other generations and experiences of older generations.
  • As a culture, how do we perceive the aging population?
  • Men vs. women.
  • What are the pressures of the media and marketing industry on self esteem and self appreciation?
  • New ways need to be developed to promote/celebrate aging.
➢ Baby boom generation will help with cultural change toward aging.
  • We need to continue to lead the change.
➢ W.H.O. standards for an age friendly community.
➢ Address the impact of ageism on self esteem.
➢ Structure of workplace and society impacts of self-esteem.
  • Impact of economics – people are more disposable in a bottom line economy.

- Difference if working for yourself or working for someone else.
➢ Recognise impact of cost of health benefits.
➢ Mentorship – intergenerational issues – older generation has experiences helpful to teaching younger generation – younger generation can mentor older one – i.e. technology.
  - Need mutual respect
  - Learning from each other.
➢ Identify what things can be changed by public policy/input?
➢ How do we advocate change?
➢ Role of younger generation in social service support system.
➢ Develop an awareness/marketing campaign re important role of aging employers – benefits of experience.
➢ Promote public policy change.
  - What role can public health unit play in supporting aging workforce?
  - What role can municipal, provincial and federal governments play re promoting positive input of aging?
➢ We promoting inclusiveness in society but does it include the aging – issues of an older population?
➢ Inclusivity means respect for different backgrounds, cultures and ages.
➢ Public commitment to respect in workplace culture.
  - An award process to show respect of the employer
  - Positive workplace style culture.
  - Build on policy on workplace harassment re aging.
  - Combating ageism
  - Reflect on 'no smoking' policies.
➢ Older workers hold on to too much of their work.
➢ How do we release some of the work to the younger worker?
  - Need to ensure the final product.
  - Supports idea of mentorship process.
  - Transition in workplace
➢ Recognise the important role of hiring a contract/consultant with experience.
  - Costs the employer less (re benefits)
  - Provides a good fit for someone with experience.
  - Supports the workplace with experience.

Health

Summary notes
➢ Age discrimination and the multigenerational workplace.
➢ WSIB/Illness and injury prevention
  - cost benefit
  - win-win instead of adversarial.

- Continuation of benefits.
- Mental health.
- Changing work standards.

Detailed flip chart notes

➢ Look for source of stress in the workplace.
  - Age discrimination
  - New CPP rules for older workers could increase stress.
➢ Need to know why there is age discrimination for the employed and the unemployed.
  - Could lead to targeted educational dialogue and listening awareness raising.
➢ Multi-generational forum – story telling and listening.
  - Public health website section on multigenerational workplaces 'healthatworkpeterborough.ca'
  - Employee and employer forum – be care of mixing to promote honesty
  - Empowering employers – separate from employees.
➢ Doing idea be more proactive in health monitoring/illness prevention – education/awareness raising.
  - Relate to WSIB claims – costs/benefits.
➢ Subsidy for employers to augment – repetitive stress prevention.
➢ Need to know; cost of WSIB fees/claims vs prevention costs.
➢ Policy idea: reduced WSIB fees/taxes if prevention happening.
➢ Employer idea: education about win/win opportunity of engaging with WSIB (awareness raising)
➢ Where is mental health in all of this? Mental health taskforce in the workplace.
➢ Need to know: more about changing work standards – what are the implications for older workers? All workers?
➢ Doing; affirmative action for older workers e.g. must consider 'older workers.
➢ Doing: result of multigenerational dialogue – coaching mentoring for younger workers.
➢ Policy: continuation of benefits(real) beyond just folks on welfare. – employer – gov.
➢ Need to know: cost/benefit of continuing vs. not continuing .
➢ Doing: Meaningful job creation.
➢ Doing: retirement adjustment programs/policies.
➢ Phased retirement options (holistic – beyond just financial)
➢ Doing: mid-life awareness raising about aging and workplace.
  - Pre-forum.
  - Review of existing literature programs addressing multigenerational issues in the workplace (specifically work ethic).

- Need to know: Levels of happiness in the workplace in relation to aging/multigenerational issues in the workplace (specifically work ethic)
- Need to know: Levels of happiness in the workplace in relation to aging/multigenerational workplaces and what can employers and employees do to increase?
- Key to happiness – work life needs to be meaningful.

Pensions and care giving

Summary notes
- Technology – care giving etc.
- Location/space/support
- Tension – gov vs private sector
  - Pensions
- Pension reform – alternatives – spread the risk.
- Work-flexibility-retirement.
- Care giving – equity/flex time etc.
  - Gender neutral policies.
  - Tax credit etc.

Detailed flip chart notes
- Use of technology in distance care giving – skype.
- Flexible employment to allow worker use of tech beyond work.
- Aging in place – thanks to technology – monitoring.
- Older folk want to be close to kids – trend in PTBO towards limited jobs for kids.
  - Exodus of affluent seniors?
  - Influx of 23-35's?
  - Limited long term care facilities
  - Financial supports – what would be helpful?
- Policies to allow: compensation for care-giving eg. UK, Australia.
  - Compassionate care – 8 weeks – limited but a start.
- Tension between private sector an public sector savings and pensions
  - e.g. RRSP revenue neutral.
  - Tax system equitable equivalency
  - Personal management of pension investment – varying abilities.
- CP low average $500/mo
  - Gender interrupted work, recent immigrants, part-time work.
- Many without capacity to accommodate more than CP/OAS.
- Job volatility (interviews) – pensions problems.
- Pensions and full-time work.

➢ Difference in public/private pension rights.
➢ Can't go to lowest/highest denominators.
➢ If you want to work, you should be able to work.
  • Highest employment is NB but note – body break down – change job demands, use experience.
➢ Pension reform, spread the risk, save more etc.
  • 25% RRSP's, private sector pensions declining.
  • Guaranteed income supplement.
  • Enriched GIS, increased CPP contributions.
➢ Incentives to keep people in workforce longer – CPP increase based on this – 25%
  • Insure higher percentage of income while working.
➢ Education – discipline of saving.
  • Youth difficult – some don't believe the pension system will survive – needs intergenerational trust.
  • Current problems don't appear to have solutions.
➢ Care giving – gender a huge issue.
  • Equity – pensions, flex time etc.
  • Role of current youth is the future.
  • Separation implications include pensions/care giving.
➢ Compensation for care giving (gender neutral) – no loss of pension rights. (self employment, small entrepreneurs)
  • Social insurance – Scandinavia.
➢ Do these questions apply to other sectors?
➢ Small business has more flexibility – more empathy.
➢ Range of strategies impressive – where is the 'lubricant' needed?
➢ Ask about big life challenges – what resources/strategies & how/will might these apply?
➢ Future of voluntarism in digital age.
➢ Living longer – health needs longer.
  • Preventative strategies?

Work/Life Balance and Knowledge Needs

Summary notes

➢ Transition
  • Full time to part-time
  • Wok to volunteerism
  • Facilitating this transition (corporate and individual respect)
  • Workaholics
  • Community SNE supports
    o Hr functions
    o Care giving
    o Financial literacy
    o Re-training, education
    o Job structure
    o Intergeneration transfer
➢ Policy – tax credit for volunteering
➢ Housing policies – "Mingles"

Detailed flip chart notes

➢ Volunteerism – create other identity away from one other sole identity.
➢ Laid off workers not knowing their interests.
➢ Corporate volunteerism.
  • Gives exposure
  • Move closer to retirement
    o Help give new identity
➢ Volunteer matching – volunteer centres
➢ Volunteerism hierarchy vs work hierarchy
➢ EAP in organizations
  • Mostly in large ones
➢ Not-profit local orgs that offer EAP
➢ Other delivery options for SME's
➢ Workaholics spread stress
  • Co-worker pressure
  • Workplace culture
  • Self
➢ Ease into retirement
  • Help with the transition.
➢ Too little being done at Gov level.
  • Find new structure of work.
➢ HR sector changes/education.
➢ Work structure

- Flexibility, part-time
- What supports does an employer need to enable older workers?
  - SME's education re benefits, bottom line
  - Managing day-to-day crises
- Accommodations that suit older workers help younger workers too.
- Younger worker – community
- Older worker – individual
  - Knowledge transfer
  - Mentorship.
- Community org to promote HR functions to SME's
  - Facilitate growth.
- Secession planning
- Financial literacy saving for retirement.
- PTBO region – attract retirees
- Self-employed – work/life balance
  - Option as people age
  - Need education
  - SEB program.
- Need to work due to financial commitments – family members – loss split.
- Housing policy & collective space
  - For labour market vulnerable
  - In-law suites
  - "mingles" co-op.
- Policy – tax rebate/credit for volunteering.
- Support for care giving
- Technological shift – impact on family structure.
- Community - definition/support
- Care – giver identity
- Knowledge and training – vocation – fun?
- Support for re-training – agencies – family
- Return on investment from training – direct?
- Orgs resistant to change
  - Commitment to continuing educ.
  - Need to learn new ways to train, workforce structure.
- Individual belief in education.
- Education is much different experience now vs 30 yrs ago.
- How do we get this message across?
- Adult education – separate from youth?
- Intergenerational knowledge transfer.
- Capturing experience of older workers.
- Incr in org – strategic formulation.
- Communication/education function to 'doing function'

- ➢ Accommodation tools to enable communication …. Mentoring
- ➢ Transitions periods – manage better.
  - Older worker reluctant to commit.
- ➢ Community vs individual responses to work/life balance
  - Communities need to take on greater role.
- ➢ SME support

The Older Workers Stories Project is one of three parts of the Aging Workforce Research Pilot Project.

Part 1 - Statistics: Development of a digital workforce analysis & modeling platform (using existing Statistics Canada data)

Part 2 - Stories & Strategies: Older worker stories & employer strategies for dealing with an aging workforce (two separate projects)

Part 3 - Action Planning and Next Steps: The creation, implementation and monitoring of a detailed Aging Workforce action plan for our community followed by planning for Phase 2 of the project. Contact a project partner if you want to become involved!

Thanks to our Project Partners and Funders

Project Partners:
Alternatives Community Program Services
City of Peterborough
Greater Peterborough Area Economic Development Corporation
Northern Lights
Ontario Secondary School Teachers Federation - District 15
Peterborough County-City Health Unit
Peterborough Social Planning Council
Service Canada Centre East-Central Ontario
Trent Centre for Community-Based Education
Trent University faculty (Sociology, Business Administration, Economics, Geography, English Literature, Canadian Studies, Mathematics, Psychology)
Watton Employment Services
Workforce Development Board
Community Volunteers

Funders:
New Horizons for Seniors Program
Ontario Trillium Foundation

Highlights of the Older Workers Stories Project

The study:
- A qualitative and exploratory study of the sustainability of manufacturing and health care workers ages 55+ in the Peterborough area during 2010.

- Its purpose was to identify and investigate labour market challenges and opportunities confronted by workers at the back end of their careers when part-time work is extending, responsibilities are piling up, the public pension is under revision and the job market is under pressure.

- The main question directing the study was: '**How are people coping, what we can do to help and what more needs to be known to promote the sustainability of a robust senior sector in the labour force?'**

- Results of the first phase of this study are set out in this document one dimension at a time (including policy implications and further research directions).

- Go to www.solutionsatwork.info to access the full report.

Policy suggestions tended to center on four main items:

1. **Build productive platforms** in organizations for meaningful and effective intergenerational exchange of strengths.
2. **Enable small to medium sized businesses** in extending work-structure and financial benefits enjoyed by those in larger agencies with resources to handle what's needed to increase the sustainability of experiential knowledge.
3. **Extend accessibility** of work and non-work related education.
4. **Enable better pension eligibility** for those whose careers have been characterized by part-time work, particularly women.

OLDER WORKER STORIES PROJECT: HIGHLIGHTS OF POLICY RECOMMENDATIONS AND RESEARCH DIRECTIONS

	Contribution of Aging/Intergenerational Relationships	Health	Work/Life Balance	Caregiving	Retirement and Pensions	Upgrading and Education
POLICY RECOMMENDATIONS	Address ageism in the workplace.	Focus on age discrimination and the multigenerational workplace. Provide information to employers about the benefits of providing employee accommodations in the workplace. Advocate for the continuation of health benefits beyond retirement to alleviate some fear from the prospect of post-retirement aging. Promote the expansion of mental health benefits. Work standards are changing along with technology and new market conditions and need to be adapted with the 'sustainable' worker in mind.	Transitions to retirement could involve expansion of ways to think of the 'self' beyond 'worker'. Expand the range of employment structures to accommodate part-time work (without an erosion of benefits). Extend relationships into the volunteer community. Help with the transition to retirement. Increase supports for smaller organizations to handle variable work schedules and expansion of personnel.	Greater work schedule flexibility to accommodate caregiving responsibilities which are ballooning for workers 55+. Ensure workplace policies are truly gender neutral not just 'lip service' in order to address the stark burden that falls on women. Introduce tax credits for care giving to offset costs. Use of contemporary technology (e.g. 'skype') to enable caregiving to be done at a distance.	Pension reform that enables better outcomes for part-time workers and those with nonstandard biographical work profiles.	An expansion of workplace delivered 'tech/ courses. Investigation into roles that higher education could play in conjunction with flexible work structures (full-time to part-time).
RESEARCH DIRECTIONS	Research should be directed toward discovering means to configure aging as a strength and as a benefit in the workplace, while recognizing the particular challenges faced by older workers and without constructing new clichés about aging.	Explore the characteristics of both healthy and problematic workplaces and their approaches to late career experiences through individual interviews, but more importantly the socio-economic determinants of a healthy social work environment and best management practices that encourage adaptation to aging employees.	Identification and mitigation of factors causing 'workaholism' (including focus on the structure of competitive workplace relations) and identifying the effectiveness, gaps and workable strategy to address employer barriers to expanding work structure options.	Research on the caregiving 'crunch', while making heavy use of national census data, has been more qualitative and has also relied more extensively on community-based research. More survey research is needed to gauge the extent and depth of caregiving problems identified as well as to assess the outcomes of strategies.	Qualitative research on pension policy that measures the subjective experience in the lives of aging workers. This research can point to more nuanced policy options that enable people to adopt retirement 'profiles' which have a better chance of meeting individual needs than 'categorical' approaches can possibly deliver.	Examine post-retraining job results to test the negative 'job councilor' view of things. Examine roles that higher education can play in extending non-occupational opportunities.

ACTION PLAN AND POLICY RECOMMENDATIONS

Topic	Specific Proposal	Detailed Action Recommendations
Contribution of Aging/Intergenerational Relationships	Address ageism in the workplace	- Create marketing campaigns to highlight the positives of a multi-generation workforce. - Support the creation of workplace mentoring programs. - Visit the Health at Work Peterborough website that includes information for employers about a multi-gen workforce. http://www.healthatworkpeterborough.ca/ - Create a funding proposal to case study local champion employers that have mentorship programs or other programs to facilitate their multi-gen workforce in place.
Health	Focus on age discrimination and the multigenerational workplace.	
Health	Provide information to employers about the benefits of providing employee accommodations in the workplace	- WSIB and injury prevention agencies to highlight cost benefits of accommodations in the workplace (more effective ones don't cost much money). Use a case example to illustrate the loss of earnings vs. the cost of accommodating the individual - Add information to the Health at Work website - Need to better understand return to work issues – connecting with physicians about returning to work – need better communication between all parties. Create a presentation for physicians and employers.
Health	Advocate for the continuation of health benefits beyond retirement to alleviate some fear from the prospect of post-retirement aging.	- Expensive to buy into a group health programs - Public policy and organizational policy piece – advocate for decent CPP, OAS - Build community momentum to advocate - Need research to illustrate the problem
Health	Promote the expansion of mental health benefits	- Conduct research into EAP programs – What is the cost? Available for small employers? - Conduct research into the expansion of benefits to older workers, especially into retirement. - Promote positive workplace culture in the workplace – promote positive organizational culture to reduce incidence of mental health. The PCCHU will be researching mental health in the workplace hope to have a mental health roundtable in the future - Provide information to employers regarding early signs of mental health issues in the workplace
Health	Work standards are changing along with technology and new market conditions and need to be adapted with the 'sustainable' worker in mind.	- Create an inventory of who is providing training/up-grading courses (post secondary, employers) for older workers who want to retrain or stay current. - Encourage employers to invest in training. - Encourage older workers to also invest in up-grading. Ensure they are aware of range of courses that are available (Fleming, Trent or online)
Work/Life Balance	Transitions to retirement could involve expansion of ways to think of the 'self' beyond 'worker'.	- Some workplaces have policies already in place regarding transitions (i.e. part-time work, return as consultant, etc.) Research and case study and disseminate information to SMEs - Develop a set of values regarding part-time work.
Work/Life Balance	Expand the range of employment structures to accommodate part-time work (without an erosion of benefits)	
Work/Life Balance	Extend relationships into the volunteer community	- Create a partnership between the workforce and volunteer sectors; Volunteer organizations can recruit through workplaces.

ACTION PLAN AND POLICY RECOMMENDATIONS

Work/Life Balance	Help with transition to retirement.	- Encourage employers to have policies in place to help with transitions (workshops, reducing work load, emotional and social planning, financial planning) - Provide workshops in the community to aid with the transition to retirement - Research communal housing for seniors - Encourage the municipality to review its housing policy with regards to accessible facilities that will cater to our increasingly larger older population
Work/Life Balance	Increase supports for smaller organizations to handle variable work schedules and expansion of personnel.	- Create a small employer co-op to share services (benefits, HR consultant, etc.) - Ensure that current information is being distributed to SMEs (i.e. Ministry of Labour handbooks) - Encourage small employers to join HRPAO or other local networks
Caregiving	Greater work schedule flexibility to accommodate care-giving responsibilities which are ballooning for workers 55+.	- Advocacy piece – as a community write to other levels of government to change caregiving leave (we've done local research, now put pressure on government) - Provide employers with information about different work structures to accommodate caregiving needs - Incorporate technology to work from home - Complete a cost benefit analysis of the cost of technology
Caregiving	Ensure workplace policies are truly gender neutral not just 'lip service' in order to address the stark burden that falls on women.	- Provide training in the workplace that increases awareness of gender roles
Caregiving	Introduce tax credits for care giving to offset costs.	- Advocacy piece
Caregiving	Use of contemporary technology (e.g. 'skype') to enable caregiving to be done at a distance.	- Research types of technology that could be used for caregiving at a distance (i.e. from work or from home to work). Disseminate to employers. - Advocate that workplaces offer flexibility for employees to check in with parents from work
Retirement and Pensions	Pension reform that enables better outcomes for part-time workers and those with nonstandard biographical work profiles.	- Advocacy piece - Hold workshops and disseminate information regarding changes to CPP to workplaces and Individuals.
Upgrading and Education	An expansion of workplace delivered technical courses	- Showcase current partnerships between Fleming and various workplaces. - Ensure upgrading courses are flexible to accommodate people who work - Provide courses for workers who need to update computer skills - Increase awareness of what upgrading courses are currently available - Ensure courses follow Adult Education principles
Upgrading and Education	Investigation into roles that higher education could play in conjunction with flexible work structure (full-time to part-time).	- Encourage universities and colleges to think outside the box regarding degree programs (i.e. different start times, part-time, accommodate people who work and want to go back to school) - Provide continuing adult education in the community.

Other recommendations:
-   Establishment of an Aging Workforce Taskforce (similar to PPCII) – implementation of action plan, strategic planning, research, etc.

Please contact the Workforce Development Board or other project partner if you are interested in further aging workforce work.