Final Report : Older Workers Project Employer Experiences

Submitted by: **Trent Applied Social Research Laboratory[1]**
To: **The Workforce Development Board**

Participating Professors: Kimberly A. Bates, Ryerson University (co-PI) [2]
Alan Law, Trent University (co-PI)
Tarun Dewan, University of Toronto, Scarborough

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Introduction and executive summary

This report presents the main results from the qualitative and exploratory study of Employer experiences of the aging workforce in the manufacturing and health care sectors in the Peterborough area during 2010-11. The purpose of the study was to identify the challenges and opportunities confronted by organizations employing older workers, and navigating the challenges of a labour pool with a high average age relative to other parts of Ontario and similar communities across Canada. The main question directing the study was: 'what challenges are created by aging labour force for organizations that already face highly competitive external environments?' There is an active research literature on aging, and generational issues confronting organizations in a variety of sectors. However, this research often fails to take community-level issues into account, and it tends to use arms length data and well defined measures that do not address the concerns of individuals or communities outside the boundaries of the organizations. As well, this research was conducted in parallel to a study of older worker stories that independently provide the perspective of workers. This report includes policy implications and further research directions. In anticipation that this qualitative study is the first phase of a larger study meant to address the aging of the workforce from a multi-level and multi-generational perspective.

Project Organization

This study involved the collaboration of six professors, an active set of community partners from the Workforce Development Board, the Trent Centre for Community Education, and a broad range of conrributing community agencies. The study was supported by: a grant to the Workforce Development Board (WDB) 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 (TCCBE). It was also supported by the active participation of members from both agencies and the broader steering committee. 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
• Watton Employment Services
• Workforce Development Board (Co-lead agency)
• Workplace Wellness Program, Peterborough City-County Health Unit

Method

Interviews were conducted with 8 manufacturing and 8 health care organizations, using a set of six open ended questions that addressed the external and internal environment of the organization, along with the issues of competition, recent history, age profile of the workers, the impact of the Peterborough location on hiring, retention and retiring of employees. Interviews were transcribed and circulated to Professor Bates, Dewan and Law for interpretation. Resulting analyses are included in this report, under four categories:

• Succession Planning (Kim Bates)

• Inter-generational Relations (Alan Law),

• Pensions (Kim Bates and Alan Law); and

• Health and Safety (Tarun Dewan and Alan Law).

Summary of Key findings and policy directions

Recruitment and retention: Bates

The key finding for succession planning is that there are differences between the sectors, and that some manufacturing organizations have difficulty hiring managerial and technical workers to replace retiring managers, while others have no difficulty. This seems to be due to a match between the organizations' needs and the preferences of management talent for a community like Peterborough. Establishments with few problems finding managerial and technical staff produce products that serve a rural clientele, which suggests that the pool of potential managerial and technical hires is aware of Peterborough and views it favorably. This pattern was similar to the viewpoint of subjects in the health care sector. Subjects whose organizations were part of global companies or were small but closely linked to international markets, expressed difficulty in finding senior managerial and technical hires. These subjects sometimes viewed Peterborough as being a union-oriented community with little sympathy for brutally competitive manufacturing markets, or were skeptical that Peterborough had the density of employers necessary for spouses to find rewarding employment commensurate with their education and experience. Securing entry level workers is not an issue for either sector, as there seems to be a surfeit of potential entry level workers. The issue seems to be a need for institutions that will enable retiring workers to transfer knowledge to younger colleagues.*

Subjects in both sectors mentioned the positive relationship between organizations and Sir Sanford Fleming College (SFC), and one mentioned Trent University, which was commended for its nursing program. SFC has shown a flexibility in program design, and seems to be a cooperative partner of local employers needed to train workers in specific areas. Some manufacturing employers also mentioned the use of temporary agencies to screen entry level workers, and sites such as workopolis or Human Resources Development Canada (HRDC). Health care subjects were actively working with high schools for non-skilled, entry level positions. The viewpoint that younger workers lacked the skills, work ethic and discretion to replace retiring workers was widespread, and SFC is clearly an asset to the local community of employers in addressing this issue.

Succession planning needs to take a two pronged approach. The first is to raise awareness within the community about the importance and size of these sectors, and of the desire of many firms to hire technical and managerial talent. It may be possible to dispel some of the ideas that outsiders have about Peterborough, and to promote it as a city with a lively managerial and technical community of professionals. It may also be possible to make the community aware of the need for managerial and technical workers not available within the community, and to promote the support of both manufacturing and health care as a means of providing employment for the large number of potential entry level employees within the community. The efforts of SSFC to create training programs that support local business should be applauded, and perhaps expanded. Trent University does not seem to play an active role in preparing entry level graduates for roles in local organizations, but it could be a source of employees for

entry level positions requiring bachelors degrees. It may also be possible for it to play a role in educating engineers and other technical staff that need to move into managerial positions, in both sectors. Engaging with both institutions and making them aware of the issues facing employers in Peterborough might be very beneficial.

Inter-generational relations: Law

The issue of inter-generational relationships is regularly spoken of as 'problems' with youth encountered by employers. Problems are mostly characterised by typical 'y generation' issues associated with work ethics and routines, entitlement to the good life, and high desire for lateral mobility, voracious consumption of experience. More. And better mentoring can be positioned as a cure for some issues encountered but tend to be positioned as one-way communication possibly mitigating against effectiveness. Mutual respect, organizational rewards, the perils of knowledge transfer are precarious snakes and ladders joining and separating the generations. Some organizations seem better able to match intergenerational strengths through *well working* mentoring programs, but even when these are successful, extension of retirement age means slowing down vertical career progression for the young which is probably needed for effective replenishment of upper ranks, particularly in rapidly changing technology environments and in a context of recruitment challenges due to the semi-rural locale. Very serious policy questions for our business leaders center on the issue of how to engage the energy of youth in the most productive way. Should they be 'straightened up' to fit existing structures? Should organizations change to accommodate new realities? Should the generations build a new future together, and if so, how?

Intergenerational relations are complicated, at best, for organizations that hope to achieve a transfer of knowledge between retiring workers and the next generations. The needs of older workers and younger workers are divergent. The technical skills of the young, the desire for a wide variety of experiences, and the expectation of moving across departments and firms may prove difficult for organizations, particularly smaller ones with well defined, small management teams that need to regenerate or replace themselves. The social capital of older workers, the experience and discretion won through years of experience may not be obvious to younger workers in need of mentoring, just as younger workers' expertise with information and communication technology may be under appreciated by older workers. Acknowledging the problem without typecasting individuals may be difficult, but it is likely to be the best way forward in training is to create two way mentoring programs. Programs aimed at increasing the awareness of the need for mentoring, and that make the generational clashes obvious -- and that treat them with humour, along with serious training in how to extend and receive advice are likely to be well received, particularly at smaller organizations. Job redesign to merge work rhythms between older and younger workers, who have different needs for flexibility is also an important issue for employers. Compensation structure review to ensure that intergenerational relations become 'part of the job' and explicitly rewarded will increase awareness around the need for two way mentoring.

Health and safety: Law and Dewan

The issue of health and safety related to aging components of the workforce revealed a number of patterns. Many organizations were proactively on top of health and safety programming and preparation for their entire workforce, not just those with more vulnerable bodies due to aging. Most organizations don't seem to have particular accommodations for the aging workforce. Ergonomics etc. are for everyone, not just older workers. Absence of attention to these issues could be somewhat explained by the effectiveness of health and safety provisions as well as a result of vulnerable people leaving organizations and no longer the responsibility of human resources professionals or management. On the other hand several organizations pointed to higher health costs at the upper end of their workforce, both in terms of workplace accidents as well as higher health benefits usage. Some saw these higher costs to be offset by the added value of loyalty, experience and knowledge that older personnel bring to the table.

Organizations interviewed were well aware of their health and safety responsibilities and many were highly proactive and responsive to emergent needs. Solid health benefit plans are a strong incentive to attract and retain experienced workers. On the other hand, some organizations reported heavy costs associated both with workplace injury and with benefit costs. Small to medium sized organizations are likely to be most vulnerable to costs associated with retaining experienced personnel and one policy direction could be for the civic and insurance sectors to play a role in better risk pooling to offset carried costs.

Pensions: Bates and Law

Pension plans are predictably more prevalent in larger and in public organizations. Shifts from defined benefit to defined contribution offsets risk involved in supporting investments and potentially enables between firm mobility, particularly important for younger personnel but less so for older personnel. While many people do not start thinking about their pension plans until on the doorstep of retirement, portable pension plan accommodation might improve recruitment at the young end of the workforce. Some attention should be given for how de-regulated retirement age interacts with pension eligibility for valued mature personnel.

Small to medium firms tend not to offer pension plans to employees vs larger and public firms. Many of the organizations in this study do not offer pension contributions to non-managerial employees,. Manufacturing organizations are competing in global markets where some competitors enjoy significant labour cost advantages, and it is unlikely that theyir contributions to employees' pensions will be increased. While pension planning appears to be tending toward the personal responsibility of individuals, firm enabled contribution to portable pensions could assist in retaining older personnel and possibly recruit younger personnel if awareness increases about the instability of retirement. Conversations could open up between firms, pension vendors and personnel throughout the life course about what could work for all concerned. Facilitation of the dialogue could be an ideal role played by a nuetral NGO.

Succession Planning: Kim Bates

Overview

Manufacturing is a primary sector, and while health care is a secondary sector dependent upon the population of a region, it is an important sector in the Peterborough area due to the presence of many retirees in the community. There were significant differences between these two sectors with respect to the impact of aging on their ability to hire and retain staff. While the aging of the community presents a challenge to the manufacturing sector, it is an opportunity for the health care sector. However, both sectors know that eventually that their aging baby boom-era employees will need to retire. The two sectors will face differing challenges in replacing these workers. Both sectors experience stable workforces with advanced age profiles, but very different external and policy environments.

"If word is out we have five roles open in say, our plant, we'll have 5,000 applications. ... So it's no problem there. The bigger problem is skilled trades … and some of those key professional roles, process and industrial engineers, mechanical/ electrical engineering, that type of field." Manufacturing.

"We've got 10% of our staff are between 65-74. We have no staff over the age of 75. Now, for some of those people that have 20, 25 years, they're very valuable." Health Care

"... I compare Belleville to Peterborough. Belleville is booming. They've had 70 or 80 new companies come to Belleville. ... Belleville is a far easier place to find unskilled labour that has some, willing[ness] to work with companies.

...The one from outside of Peterborough is, like, whatever job you need me to do. The one from within Peterborough is more of a well, you know, the collective agreement says this and I can only do that and I've already checked with Human Rights ... I've been doing this for over 20 years. I've had a total of about 6 years where I've worked in Peterborough and every Human Rights case I've ever had, every arbitration I've ever had has been in Peterborough, and everywhere else, you could settle it. It's a scary mindset this town's got to get over." Manufacturing

Main findings

The health care sector and the manufacturing sector differ in their perspective on the role of the community of Peterborough. Several subjects in manufacturing organizations expressed frustration with attitudes in Peterborough that make it a less attractive location than some surrounding communities. In this view employees seem less willing to be flexible to contribute to the competitiveness of the operation, and very protective of their human rights or working conditions as defined in collective agreements. Manufacturing managers that expressed this view tended to have come to Peterborough in a management role and to have experience managing operations in other communities. Belleville and Trenton, in particular were held up as examples of communities more friendly to employers in manufacturing, and that had experienced more growth. Others noted that the small size of the manufacturing sector, and of the community, made it difficult to attract managerial and technical employees born and raised in Canada. Potential employees' view that Peterborough was in "the bush" and would lack opportunity for spouses to pursue rewarding careers, as well as a lack of networking opportunities within their fields were seen as limiting manufacturers from hiring managerial and technical personnel. These organizations were attempting to recruit immigrants into managerial and technical positions. For other manufacturing organizations, the cohesive community and strong local institutions made Peterborough

"The trouble with low turnover is there's, you know, the tendency to become complacent. Entitlement sinks in. Peterborough's still in kind of a backwater ah, location. And if you have dual income family, it's very, very difficult to get both spouses, you know, good employment in the area." Manufacturing

"the pool of technical talent is going to be there. And the interesting thing is those guys are willing to move to Peterborough. They think it's fantastic that they've got a chance to work in their field and they don't see a difference between Peterborough and Toronto or anywhere else. It's like hey, I have a job." Manufacturing

So then you've got an aging workforce that's narrowing their ability to work. So maybe they'll work five days a week and then every other weekend, and then you know, they get to a certain point well, I only want to work two days a week. So I still have to keep them as an employee but now I've got to find someone else to fill in all those shifts. Manufacturing

I think Peterborough is a great draw. I think our hardest part, it's not recruiting people from far away. Our bigger challenge is keeping the new, younger grads in town, but reality is, when you graduate, if you've grown up in Peterborough and you went to school in Peterborough, it's time to get out for a bit. I would never hold a grad back ... part of the experience is going away. We hope we bring them back. So that's part of it. Manufacturing.

an idea destination for managerial and technical staff, particularly those that come from similar communities with young families. Manufacturers with little trouble hiring native born Canadians tended to produce more goods for the Canadian market, and were less likely to be in high tech sectors.

In health care, the growth of retirees in the community was seen as an opportunity for expansion and a source of stable employment for service providers. There seem to be a variety of programs designed to train new entrants to health care, and policies that created a need for workers to support Aging in Place for retired community members. Here, the size of the community was seen as limiting the supply of spouses accompanying new employees in other sectors (e.g. manufacturing, retail, etc.) that would be eager to enter the health care field At the same time the factors that made Peterborough attractive for Canadian-oriented manufacturers were also viewed as positives for potential hires in health care, centered on a positive community environment. In this sector, client comfort zones may make it more difficult to replace Canadian-born workers with recent immigrants. This issue came through in interviews as a general concern about service providers and clients' right to refuse service. Most of the difficulty in locating appropriate personnel occurs for experienced, managerial and technical workers in manufacturing, while the health care sector subjects reported few or no difficulties.

Succession Planning is also an important issue for both health care and manufacturing, but it is handled very differently in the two sectors. In manufacturing, organizations face really competitive product markets, and the organizations still operating in the Peterborough region must be regarded as "Survivors" of the exodus of many manufacturing organizations. Highly competitive product markets, rapidly developing production and communication technologies, and a high wage setting mean that the ability to rapidly innovate is a critical skill for manufacturers. Highly stable workforces with very low turnover and a large number of older employees in both management and amongst operators may threaten the ability of these organizations to innovate.

The remarkable stability of the workforce is one legacy of a sector that has contracted in size over the past two decades. This is not a vibrant sector where workers leave to

pursue exciting opportunities with other manufacturers in the Peterborough area. As well, when workers retire or leave, manufacturers redesign their positions, creating fewer jobs than the number vacated, often substituting capital for labour by adopting sophisticated technologies. New positions in manufacturing will often have a much higher skill set and require more training, often at technical colleges, than the positions being vacated. The lack of turnover in many manufacturing organizations seems to have lead to a feeling that innovation is more difficult to achieve, because new ideas often come with new hires, and without turnover, innovators must effect change without fresh perspectives.

Succession planning in health care is very different, because the aging population represents a growth in the market for health care, particularly home support and residential care. Workers and management also enter this sector with experience working in hospitals, and are drawn to it by the flexibility of positions and the ability to manage themselves rather than working in team settings in larger organizations. Their age and discretion work for them in this setting, rather than against them, and they appreciate the release from shift work. In this setting, low turnover also acts to improve the outcomes for individuals, organizations, and clients, because both management and front line service providers gain experience and discretion that improve service to clients. Clients in need of care must also be willing to accept help and assistance from service providers, and experienced providers are often more adept at managing clients' expectations. An influx of immigrant care providers might challenge this model, even if they have extensive experience in Canada. However, managers across the sector recognizethat eventually their older workers would retire, despite their willingness to provide flexible hours and working conditions. There were few formal plans in place to replace retiring workers, although several subjects mentioned sister facilities in other parts of Ontario.

Policy Directions

The primary issue for policy directions is related to the scarcity of potential employees for managerial and technical positions in manufacturing, which has led some manufacturing organizations to recruit immigrants for these positions. For health care and the remainder of manufacturing organizations, Peterborough is a very desirable location due to its affordability, proximity to nature, and the many activities that support a family-oriented lifestyle. These same features are also likely to appeal to immigrants recruited for managerial and technical positions in manufacturing. The settlement community in Peterborough needs to consider the needs of mid career professionals with good jobs when designing programs for integration. It also needs to support the children of these immigrants, who grow up in Peterborough and feel at home in the community, but who may face discrimination from some community members. Promoting an awareness amongst the community of the type of immigrants moving to Peterborough is another clear policy direction.

There is also a clear need to market Peterborough to the business community, and perhaps to market the business community to some members of the community. The manufacturing sector is smaller than it was, but Peterborough still has a large number of factories, and might attract more start-ups. Obviously this region competes with other areas for manufacturing establishments that cannot afford the high cost of land and infrastructure associated with the Greater Toronto Area (GTA). However, as a location and as a community, Peterborough is an attractive location that should be competitive with some of the nearby locales mentioned by subjects, nature, and proximity to the GTA.

It is also critical that both employers and employees create options for retiring workers, such as flex time and consulting contracts. Several organizations mentioned that the loss of valued senior management could be ameliorated through part time work. Older workers at all levels of the organization appear to be valued for their experience and tacit knowledge, and most organizations seem to be adept at creating flexible positions for both management and other staff. Subjects in both sectors acknowledge that in the coming decade there will be an inevitable exodus from their ranks, and health care

organizations, in particular, seem to lack a clear vision for how to replace both service providers and management.

Research Directions

The clear research direction that emerges from this study is the role of immigrants in filling managerial and technical positions being vacated by retirees. Is this segment of the population informed about opportunities in Peterborough? Are there community support mechanisms for these immigrants and their families? Is this segment of the workforce a beachhead for further immigration at all levels and in other sectors? The plentiful supply of entry level workers suggests that immigrants won't be a prime target for employers seeking to fill positions for service delivery or manufacturing operators. However, the different demand patterns between these two industries indicates that more research is needed to evaluate patterns in other sectors. It seems likely that retail, which has a similar organizational structure to health care, might have a similar pattern, due to the large numbers of customer service staff. However, retail experiences higher turnover and requires fewer credentials than health care, which indicates that research is necessary to generalize beyond these two sectors.

Inter-generational Relations: Alan Law

Overview

The issue of inter-generational relationships is regularly spoken of as 'problems' with youth encountered by employers. Problems are mostly characterised by typical 'y generation' issues associated with work ethics and routines, entitlement to the good life, high desire for lateral mobility, and voracious consumption of experience. More. and better mentoring can be positioned as a cure for some issues encountered but tend to be positioned as one-way communication possibly mitigating against effectiveness. Mutual respect, organizational rewards, and the perils of knowledge transfer are precarious snakes and ladders joining and separating the generations. Some organizations seem better able to match intergenerational strengths through *well working* mentoring programs. However, even when these are successful, extension of retirement age means slowing down vertical career progression for the young, which is probably needed for effective replenishment of upper ranks, particularly in rapidly changing technology environments.. Very serious policy questions for our business leaders center on the issue of how to engage the energy of youth in the most productive way. Should they be 'straightened up' to fit existing structures? Should organizations change to accommodate new realities? Should the generations build a new future together, and if so, how?

Main Findings

They just won't sit still

Youth exposure to and engagement with high volumes of knowledge to be processed simultaneously clashes with older generations' techniques of focused and concentrated processing of single actions. 'Multitasking' is a fact of life for those weaned on computer and social environments which immerse the person in a seamless flow of knowledge and action, undercutting sustained attention to any particular task or even life domain very difficult. While focused job completion may be needed for good organizational integration, consideration could be given to facilitation of job design that enables new psychological structures.

"And these [older] guys see them as they don't listen to instructions, they can't sit at their desk and just do their job, they're this, they're that, they're either on their computer, they're doing other stuff. So there's a lot of fighting or finger pointing between the generations." Manufacturing

"These are the number of shift changes that you've requested. You've only been with us for four months. You're a good worker when you're here. You're a little hyper, maybe, but we need you to settle down. We need to be able to rely on you and you've got two months to show us you can." Health care

"The younger people don't want that. They're like, I want to learn everything about everything. I want to learn these 19 things and I want to move around. I don't want to come in and become the world expert." Manufacturing

High levels of entitlement

Linkages between education and job quality are reported as somewhat 'taken for granted' and probably resulting from rhetoric resonant in higher education institutions about the value of qualifications to the job market. Unrealistic expectations can have negative effects on careers and puts some pressure on organizations to "re-socialise" new job entrants. While somewhat benevolent organizations can handle this, the post- GFC world may not be as tolerant or enabling as desired. Consideration could be given to reveal extant job conditions to youth prior to leaving their educational institutions. On the other hand, flexible work scheduling will be

"… So you just, you have to be prepared to, to manage this younger workforce or they're not going to come, and then older ones that want their time off because they've earned four weeks of vacation, aren't going to have anybody to cover for them.… They've grown up differently. They've grown up with a different work ethic than a lot of us, um, and we just need to try and understand what they need in their lives. They're not going to work themselves to death. They are, most of them are not going to do that. They've been brought up to expect everything or they've seen their parents work themselves to death and they're not going to want to do that." Health Care

"The problem is that I don't necessarily think they're prepared for the reality of that workforce because they have this expectation in their head that they're going to walk into this full-time job and that it's all going to be easy and um, but it's not. It is a challenge and if you're not organized and you don't have a solid work ethic, it's hard and those people don't last. They just don't." Health Care

critical to retain members of this generation. Typically, flexible work scheduling and even volumes of work has been positioned as a 'family' issue, but flexibility requirements will become increasingly important for workers aiming to synthesise complex lives even in absence of family obligations. The extent to which organizations are able to adapt to changing social norms, may mean the difference between keeping our youth in the region, or losing them to competitors who are able accommodate and even leverage new approaches to work while at the same time creating organizational environments that merge strengths of the past with emerging realities of the future, and in a globally competitive environment.

Younger people critical to recruit from the outside

Recruiting and retaining qualified youth is a perennial problem for many businesses in non-urban centres. Businesses with national or global internal labour markets (generally at the 5000+ employment level) are capable of circulating executive and technical talent though non-urban centres

"Older/rural, younger/urban, those are our two worlds really." Health care.

"Younger people don't see Peterborough as having a lot to offer. It's not downtown Toronto. It's not downtown Calgary. Ah, we've been actually fairly active to say no, Peterborough is a great place to be because you've got the best of both worlds. We're starting to promote what we call green jobs. You can walk to work in Peterborough." Manufacturing

and don't struggle too much in attracting willing and capable talent. Some firms in manufacturing appear to do well in attracting immigrant professionals that see the Canadian countryside as a good relief from congested urban life in their home countries. However, smaller firms in manufacturing and health care providers in general comment that attracting higher end young professionals into the countryside can be a very difficult 'sell'. The issue of medical professionals being overwhelmed and under supported is being addressed through network teams that appears to be chipping away at the issue successfully and peer mentoring from senior colleagues a good vehicle.

The issue of 'quality of urban life' however, appears on the radar for manufacturing employers. New emphases on 'green living' may make sustainable country-side life attractive for 'new-world' urban youth, and help retain 'home grown' Peterborough youth but these will also be of the Y generation and consideration will continue to be necessary in how we integrate the pressures of global competition, 'tight' organizational forms and older mentors with greatly divergent views on what to do with the youth 'problem'. This is a tightrope balancing act.

'Job-blockers' cause tension for aggressive youth

For some agencies, extension of retirement age is one of the main ways that higher end positions can be filled in absence of appropriate 'back-fill' from younger generations. While this situation means highly valued skills are retained and values of experience ar stretching, agencies are reporting some resentment from younger workers about 'job-blockers' impeding rapid career progress. On one hand, slowing down a bit might be a good idea for some

"yeah, there is people who are sitting there in those jobs and certainly, it's true at a lot of organizations. There are many, many, many, not just in manufacturing where you've got a lot of people kind of sitting there, age 63, 64 and now with what's happened to people's RRSPs, they're not going to be retiring until they get sick. So it's certainly an issue, I think." Manufacturing

"… new people, they're not seeing the chance to kind of move through the system quickly enough because there's not a lot of openings. You know, we have an organization of what we call blockers. If you're, I would, I would, at my age, um, I'm probably considered more of a blocker for somebody." Manufacturing

'jumpy' Y generationers and extended mentoring will help bridge unrealistic expectations with the demands of global competitive performance. On the other hand, technology skilled up youth are also necessary in effective organizational performance. Ways must be found, to enable career performance and progression while simultaneously engaging willing mentorship. Older workers are not likely to part company with the knowledge in a way that might threaten their jobs, younger workers need to get on with their careers and to do so in the new world way which means much lateral mobility and very steep learning curves they are capable of. Solutions might be found in 'job tailing' rather than 'job shadowing'. 'Job tailing' © here means extending knowledge and experience from older workers and responding to older worker needs to keep their jobs but with progressively less of the person involved in it, and gradually more youth involved. Even with mid-career experienced personnel looking to move up, ways need to be found to exchange knowledge so that the organization gains leverage from individual's career moves. Everybody wins, no one is threatened if handled properly in the context of lateral job movement which the Y gens covet the most, even if it has to be job-hopping between firms Perhaps better to gain the advantage of good knowledge transfer than lose to a competitor that is very good at it and delivers work/life balance to boot.

Tech savvy, no walls workplace and a brave new ethnic world - how's mentoring supposed to look?

Some agencies interviewed found that intergenerational tensions pop up mostly potently on the issue of information technology and it's deployment. While older workers are open to learning new tech, it has not been a part of their life blood as it is for the younger ones. Resentment from older workers can get in the way of

"So that's always a challenge to them, you know, and it's, gets kind of hard on some of their egos. Some of the, you know, some of the older guys will be working away trying to solve a quality problem and some, one of the younger guys will come up and just like they are with computers, they'll, you know, they see through a problem quicker and they'll fix a, fix a problem on one of these materials. And, so that can be an issue." Manufacturing.

"… younger nurses who, ah, this may be a different kind of workplace for them, particularly if we go to increasingly work from home. That person needs strong mentorship." Health Care

effective mentoring – IF we consider mentoring to be a one way street. Opening up the idea of mentoring to include 'exchange' can overcome the 'resentment' of being taught something by someone in an environment where knowledge competency is paramount. This will require development of organizational cultures where the ability to receive knowledge is as valued as the ability to provide knowledge.

New tech also enables the spaceless workplace. Working at home has it's problems as is well canvassed in the literature, but also has it's upsides in cost savings and possible life/balance acquisition. One of the common challenges to overcome has to do with surveillance of personnel, but also of mentoring when day to day physical contact and subsequent in-person nuance needed for effective mentoring (vs 'bungy mentoring' © done for mere c.v. requirement). Once again, a good opportunity for mentoring exchange might be in the offing for the young to help their senior colleagues help themselves and the reverse, possibly causing a spiralling mentoring storm that could potentially provide competitive HR advantage.

As our lived as well as commercial lives becomes increasingly ethicised along with globalization, youth hold the keys to effective diversity practices required of common workplace and commercial relations. We would do well to listen carefully to what they

say when it comes to respecting ethnic diversity, in our employment practices an in our commerce.

Policy directions: firm level

The overall policy aim is to produce work structures that most effectively leverage the skills and abilities of the generations. Some approaches could include:

- Job design to mutually trade tech functionality with mature decision making ('Job tailing')

- **Enable high degrees of sideways job movement** in early career (possibly through rotating inter-firm internships partnered with mature workers).

- **Construction of work teams** to include intergenerational personnel with switch-off roles.

- **Develop incentive systems** that place intergenerational learning 'on the map' for management and operational personnel alike.

Policy directions: civic level

Policy implications at the civic level are positioned here as possible action items to support businesses in their efforts toward effective intergenerational relations:

- **Create/enable internship rotation and placement mechanisms** that expose youth immanently entering the workforce so that mutual enculturation can take place before employers and personnel are 'on the firing line'. One approach might be to work with appropriate sectoral agencies along with education institutions to develop, test, fund and roll out work enculturation programs.

- **Assist in building well working team structures**. Perhaps as a corollary to the above point, team structures that are common in industry sectors may require adjustment to accommodate (as is feasible within operational limits) a true negotiation of team processes that come as close as possible to recognising the limits and opportunities of action open to team members from different generational cohorts. This could possibly involve development of new inter-personal styles and

routes to negotiate these. Enabling easy access to such a service could be of high benefit to small-medium enterprises that do not have appropriately skilled HR personnel.

- **Provide advice and support on approaches to incentive systems**. In order for genuine 'trade' and leverage of talents located differently in age cohorts, incentive systems could provide a good deal of leverage by making positive intergenerational outcomes directly in line with performance incentives.

Further research

Further research items here are meant to assist development of policy directions at the firm and civic levels include:

- **Identification of best practices** in inter-generational team structuring, internships and incentive systems.

- **Gap analysis of existing structures**. Contemporary best practices can help identify what others are doing that seems to work well, but gaps in practice may exist where contemporary practices fall short of meeting real needs.

- Research agenda to modify/build inter-generational relationships into organizational **structures and work rhythms**. Once practice gaps are identified, work will need to be done to design and build effective approaches that fill identified gaps.

Health and safety: Tarun Dewan and Alan Law

Overview

The issue of health and safety related to aging components of the workforce revealed a number of patterns. Many organizations were proactively on top of health and safety programming and preparation for their entire workforce, not just those with more vulnerable bodies due to aging. Most organizations don't seem to have particular accommodations for the aging workforce. Ergonomics etc. are for everyone, not just older workers. Absence of attention to these issues could be somewhat explained by the effectiveness of health and safety provisions as well as a result of vulnerable people leaving organizations and no longer the responsibility of human resources professionals or management. On the other hand several organizations pointed to higher health costs at the upper end of their workforce, both in terms of workplace accidents as well as higher health benefits usage. Some saw these higher costs to be offset by the added value of loyalty, experience and knowledge that older personnel bring to the table.

Main findings

Health and safety accommodations not age specific

The issue of health and safety accommodations for older workers is not *perceived* as a big issue for some organizations. There, interviewees don't seem to be thinking of accommodations for older workers in particular although several commented on increased risk and cost associated with health and aging. Most of the health and safety accommodations are of the "training in ergonomics" variety that apply across the age spectrum of the workforce.

". I think it's, in our organization, it's one of our key priorities from a manufacturing perspective is ah, you know, we start every day with safety first." Manufacturing.

"Um, our aging workforce, you know, it's what it is. You know, it's um, it's um, if you're proactive in the beginning, we have not experienced huge amounts of, of problems, not anymore than I experienced ah, in other workforces." Manufacturing.

"Um, well we, about every month, we bring an ergonomist in, um, and we've been very active on that. And so, that's directly linked to part of our Health & Safety. So she's doing like, an inspection now of all of the workstations up here." Manufacturing

The rest of the accommodations are oriented

towards flexibility in schedule and reduced hours. It seems possible that accommodation may be differentially applied to valued employees, but we have no direct evidence that this is the case, because interview subjects referred to valued employees with high social capital and deep knowledge of the business, and did not refer to the possibility that some older workers might be less valuable than others, nor was accommodation ever referred to as a source of conflict or a tool to encourage exit from the workforce. Most of the accommodations were not age specific.

Health care costs (accidents and insurance) can climb with aging but offset by value-add of experience.

Larger firms tend to be able to respond more proactively on health and safety prevention. Smaller firms are less likely to be able to afford inspection and consulting services. Given the increasing importance of health and safety to older workers (more vulnerable bodies) as well as interest in retaining them, there may be a role for development of sector-specific service advice for smaller firms.

"And then there's the health, I mean, as they get older, the costs are there." Manufacturing

"There's no retirement legislation so, and you've got, um, the aging people are prone to accidents. It's huge… [There'] health & safety and accidents, but then in the wholesale end of things, the knowledge base is … positive." Manufacturing.

"If we go for a walk there, you'll see some of them, you know, the joints are starting to go and um, my health costs are, you know, quite a bit higher than they, they probably should be. Probably, probably 50% higher than they should be on my benefit package, just because of the age of the workforce. And um, you know, but again, being a smaller business, you tend to be a family and you don't cut them loose just because they're starting to cost you a bit more money, right." Manufacturing.

Smaller firms also experience increased costs associated with aging bodies. No upper cap on retirement age may be a boon for firms to retain professional level personnel in love with their work, but management of line-level personnel face a different situation. Some firms balance the increased cost of absenteeism and medicare costs with the knowledge and maturity and knowledge is garnered in return. Smaller firms also have a more intimate relationship with their personnel which can translate in mutual loyalty, but not all firms are likely to be able to carry the sort of cost levels potentially involved.

Availability of good health benefits and active accommodations a good incentive for older workers.

Health related 'accommodations' like reduced hours, not operating the forklift, extra care while lifting heavy objects etc. appear linked to enabling people to stay working past normal retirement age, and are treated in a similar fashion as benefits to pensions, RRSP, and so forth. Smaller

"in some areas, um, Health & Safety becomes an issue at the end of the career just because of repetitive stress and those sorts of things ..." Health

"Biggest attraction to an older worker right now, we're finding, is health benefits. Keeping the health benefits will keep you in the job." Health.

"Our health plan is, is vulnerable to increase costs there to the company because as we get older we might need ah, medication and ah, drug ah, um, insurance companies." Manufacturing

businesses especially seem to talk about the benefits of loyalty amongst their older workers, and seek to find productive roles for valued employees, when there were concerns. For managerial workers these accommodations included post-retirement contracts, while for non-managerial workers health and safety accommodations and flexible hours were occasionally mentioned.

Organizations relying heavily on older workers appear likely to face rising costs of health insurance and access to good health benefits is of high value to older personnel. Given the unevenness in availability of health care programs, particularly to small and medium businesses, it seems reasonable to suggest, once again, that better pooling arrangements by insurance vendors could be of high value to employing agencies trying to attract and retain older workers.

Policy Directions

Organizations interviewed were well aware of their health and safety responsibilities and many were highly proactive and responsive to emergent needs. Solid health benefit plans are a strong incentive to attract and retain experienced workers. On the other hand, some organizations reported heavy costs associated both with workplace injury and with benefit costs. Small to medium sized organizations are likely to be most vulnerable to costs associated with retaining experienced personnel and one policy direction could be for the civic and insurance sectors to play a role in better risk pooling to offset carried costs.

Research Directions

Research into the barriers and limitations of risk pooling could help civic and insurance sectors create effective programming for small and medium sized firms. Research into interactions between probable retirement age (now that we have unregulated retirement dates) viability of health plans could also be done. It also seems reasonable to document some very good practices conducted by Peterborough firms in accommodating vulnerabilities throughout the life course through proactive thinking and action.

Pensions: Alan Law and Kim Bates

Overview

Pension plans are predictably more prevalent in larger and in public organizations. Shifts from defined benefit to defined contribution offsets risk involved in supporting investments and potentially enables between firm mobility, particularly important for younger personnel but less so for older personnel. While many people

"I think as the workforce maybe becomes a little more mobile, the defined contribution plans may make more sense for them because they want to take money with them as they go versus locking it in our little pieces of RRSPs. ... Um, most people, when we're hiring them, don't even think about pensions until they're in their 50's. It's never been a question I've ever been asked in all of my time of doing interviews."

do not start thinking about their pension plans until on the doorstep of retirement, portable pension plan accommodation might improve recruitment at the young end of the workforce. Some attention should be given for how de-regulated retirement age interacts with pension eligibility for valued mature personnel.

Main findings

Pension planning becoming a matter for individuals?

Very large as well as public sector organizations in the study provide matched pension contribution plans, smaller and private sector agencies preferred to match RRSP's, or had no pension regime at all. Several employers expressed regrets that they could not fund pension contributions, but most took the lack of employer

"I don't know [if there is a pension] off the top of my head for my […] workers. I do know that there is a benefits plan but it's managed by the union. [Our firm] doesn't have anything to do with their, that was part of contract negotiations last time. ... Um, the union thought they could do a better job of managing it. We wish them luck on that." Health Care

sponsored plans for granted. Pension planning, while part of Canadian culture via the tax code and "RRSP Season", seems to have become an individual level issue. In some cases there were profit sharing plans for senior management staff, although this was not widespread. Similarly, some organizations were family-owned, which makes pension planning issues and succession issues a matter of integral importance to the organization.

Pension structure of relevance for the experienced

Shop floor personnel tend to retire as early as they can, partly because that the physical demands of their work simply wears them out and identities tend to be less 'welded' to their careers. Professional level personnel tend to work much longer due to the intrinsic motivation they find in their work.

"Production people tend to retire at 58, 59, 60. The odd person has maybe had some misfortune in their life, ah, probably stays later. The professional group tends to be closer to 65 but some of that is just the strain on, you know, and that type of thing that the people on the floor have worked there for 30 and 40 years. They're tired. The people in the engineering group and the commercial group and that, really are doing what they love, so retirement is a whole different thing for them." Manufacturing

While defined benefit pension plans are highly attractive to personnel and can help with retention, one employer argues that younger personnel don't seem concerned with pension benefits as a hiring feature. On the other hand, the same employer argues that defined contribution plans could be better for youth interested in between firm mobility due to the portability of defined contribution plans. It seems reasonable that as the CPP becomes less capable of supporting a dignified retirement, and that the Y generation are in search of job mobility that pension structure could help 'tip' the balance if a job candidate is

"Um, a lot of, it's a defined benefit plan versus a defined contribution. So a lot of companies are getting out of that. So it's definitely something that ah, people are looking for stability like. I think as the workforce maybe becomes a little more mobile, the defined contribution plans may make more sense for them because they want to take money with them as they go versus locking it in our little pieces of RRSPs. So um, benefits, we, we have competitive benefits. Um, most people, when we're hiring them, don't even think about pensions until they're in their 50's. It's never been a question I've ever been asked in all of my time of doing interviews is what's my pension" Manuafcturing

"benefits are starting to be more of an issue and stability. I think a lot of people are, maybe have been laid off a few times or seen businesses close, so they really are more conscious, the professionals, in particular, of what really is the future here." Manufacturing.

faced with choice between employers. This raises an interesting issue of workplace loyalty which has reputedly been in decline along with the viability of job security. To what extent and in what form will pension plans become a competitive edge in recruitment?

Pension plans that set caps on age at which contribution should stop run squarely into removal of caps of retirement age. Pension plan vendors may have to work on this problem if they are to remain competitive.

Mobile pensions help mobile personnel

Big as well as public organizations tend to support pension plans of one sort or another compared to smaller agencies that do not. If pension eligibility becomes a strong feature for recruitment in the future, then personnel may be smarter to start their careers in big firms and then shift with a portable pension plan once established. Further research needs to be done on the links between pension plan portability and career path structuring.

"if we get a 15 year employee from the hospital, they move their pension here." Health Care

"We have a DB pension and we closed that pension down about five years ago and not because we were wildly smart. We got lucky and we basically put it in cash or bonds. So when the market kind of tanked, the pension fund was completely untouched. Ah, actually, we just had a pension meeting about a month ago and we'd be in the top 1 percentile, or you know, the 99th percentile, pardon me of um, we had no unfunded liabilities." Manufacturing

"benefits are starting to be more of an issue and stability. I think a lot of people are, maybe have been laid off a few times or seen businesses close, so they really are more conscious, the professionals, in particular, of what really is the future here." Manufacturing

Moves from defined benefit to defined contribution pension plans are of benefit to employers facing volatile investment markets and we are likely to see substantial

"Clerical staff here are not as old as the case managers. There's more turnover, but again, you know, we're a very attractive place to work. Um, you know, public sector usually pays better, has better pension plans than private sector and so once you're here, you like to stay." Health Care

shifting to this form. That personnel take on the risk in defined contribution plans could possibly not only become the norm as the Y generation ages and could also assist in mobility at early career stages. Perhaps something for HR personnel to keep an eye on is whether or not the Y generation will want more stability as they age or if they will remain acculturated to consuming risk.

Policy directions

Small to medium firms tend not to offer pension plans to employees vs larger and public firms. While pension planning appears to be tending toward the personal responsibility of individuals, firm enabled contribution to portable pensions could assist in retaining older personnel and possibly recruit younger personnel if awareness increases about the instability of retirement. Conversations could open up between firms, pension vendors and personnel throughout the life course about what could work for all concerned. Facilitation of the dialogue could be an ideal role played by a nuetral NGO.

Research directions

The interaction of pension structure and retirement age cap removal could be investigated re the extent to which decisions to stay/go are dependent on funding formulas and how these fit into business margins.