

Older Worker Resource Kit for Employers



North Superior
Workforce Planning Board

**EMPLOYMENT
ONTARIO**

November 2010



On the Cover:

The maple leaf has long been a proud symbol of Canada while the maple tree itself represents balance, promise and practicality.¹ The wood of the maple is well known for its strength and durability. In light of this, we have chosen the image of a maple tree in autumn to represent the experience, strength and resilience of Northwestern Ontario's older workers.

The views expressed in this document do not necessarily reflect those of Employment Ontario.

¹ Kathleen Karlsen, *The Deep-Rooted Symbolism of Trees*, December 2, 2008, <http://www.livingartsoriginals.com/infoforests.htm>.

ABOUT THE NORTH SUPERIOR WORKFORCE PLANNING BOARD

North Superior Workforce Planning Board (NSWPB) Mission Statement is:

"Connecting community partners to improve the quality of life in our communities through workforce development."

The Board's mandate is to:

- Engage partners in the development and implementation of evidence-based local labour market plans and priority activities;
- Collaborate with business, labour, communities and organizations in order to advance local labour market strategies;
- Develop and implement a broad range of community-based projects with our partners to address specific needs related to literacy, employment and training information, adjustment, labour market information, and diversity group strategies;
- Host events, forums, conferences and fairs to build stronger engagement with, and between, the demand and supply side of employment and training.



North Superior Workforce Planning Board Region

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The NSWPB area is known as Local Area #24 and is made up of the entire Thunder Bay District as well as the areas west of White River, east of Ojibway Nation of Saugeen, and south of Webequie. It includes Nibinamik (Summer Beaver), Neskantaga (Landsdowne House) and Eabametoong (Fort Hope).

This Resource Kit for Employers represents the next step in the NSWPB's plan to address the issues of an aging workforce as well as workforce shortages in Northern Ontario and specifically in the Planning Board region.

Valuing Older Workers – The Kit

This kit will assist employers to maximize the many benefits of having older, more experienced workers in their workforce and will also help them to recruit older workers. It is designed to help business owners, managers and human resources practitioners better understand and engage their older workforce. The kit includes information on:

- Best practices with respect to the engagement of older workers in the labour force;
- How best to recruit older workers; and
- Programs that exist to support older workers in the Planning Board region.

In addition to this kit, the North Superior Workforce Planning Board has produced a resource guide for Northwestern Ontario workers offering information and tips for those older workers who are seeking employment.

Acknowledgments

The North Superior Workforce Planning Board would like to thank the London Economic Development Corporation, creators of the *Experience Works* kits for both older workers and employers as well as the authors of *Working Longer: New Strategies for Managing, Training and Retaining Older Workers*, William J. Rothwell, Ph. D., Harvey L. Sterns, Ph. D., Diane Spokus, Ph. D. and Joel M. Reaser Ph. D. for their permission to include excerpts from their book in this kit.

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THE CHALLENGE

A National and Provincial Challenge

Canada, along with developed nations throughout the world, has adopted the *Madrid International Plan of Action on Aging* which recognizes that older people have important contributions to make socially, culturally, economically and politically. The plan is based on the idea that older people should be able to work as long as they are able to be productive. It also emphasizes the need to build awareness of the benefits of maximizing the use of the knowledge and skills of older workers.

In 2007, the Conference Board of Canada published a report entitled *Ontario's Looming Labour Shortage Challenges: Projections of Labour Shortages in Ontario and Possible Strategies to Engage Unused and Underutilized Human Resources*. The report projects a "dramatic shift" in the age structure of Ontario's population from 2006-2030. The population of those aged 65 and over was highlighted in particular as a segment that would grow significantly during this period. Estimated at 12.9 percent of the province's population in 2006, it is projected to comprise about 20.6 percent of the population by 2030. This shift, the report said, is mostly due to the aging of the post-war Baby Boomer population.

Clearly, the workforce of tomorrow will be significantly different from what it is today. Consider these factors:

- In 2007, the number of people aged 65 and over living in Ontario was 1.68 million. By 2030, it is estimated that this number will reach 3.46 million.
- Canada's birth rate has been declining since the 1960s making the recruitment of younger workers a growing challenge.
- Canadians are living longer and healthier lives. As life expectancy grows, so will the importance of older workers in the workforce.

Older employees can bring great value to a company, particularly if they played a role in the building of customer relationships over many years. They have made a choice to stay with a firm and they tend to be rather loyal and almost protective of their company. In general, they bring a working life full of experience to a company along with a willingness and an eagerness to work.

-Colin Bruce, Managing Editor, The Chronicle Journal, Thunder Bay



The Challenge in the North Superior Workforce Planning Board Region

The population of Northwestern Ontario is aging at an even faster rate than that of the province with virtually all communities (except First Nation communities) reflecting this trend. This is especially true in the region's north shore resource-dependent communities.

In recognition of these trends, the North Superior Workforce Planning Board commissioned a report in 2004 to determine the effect of an aging population on future skill shortages in the region. The forecasted impacts are now coming to fruition including:²

- Workforce shrinkage;
- Increasing demands for social services;
- Growing health care requirements; and
- Shortage of skilled trades workers especially where retirement levels are high.

The Board's 2008 Trends, Opportunities, Priorities (TOP) Report points to a Catch 22 situation, with the aging workforce limiting the availability of labour which in turn undermines efforts to attract new businesses, thus restricting the capacity to diversify the economy and offer employment for youth who are otherwise leaving the region.

At the same time, the North Superior Workforce Planning Board region has been undergoing a significant structural shift in its forestry sector. Once the key economic generator for the region, the forestry industry is experiencing restructuring, closures and severe direct employment loss. Many of the displaced employees are older workers who have been employed in this sector their entire working lives.

These displaced workers have many transferable skills that can be used in other industries and jobs, such as in mining. For example, those who drove trucks or operated equipment in the forestry sector can use their skills to operate trucks or equipment in a mine. As growth in the mining sector accelerates, vacancies are becoming more challenging to fill.

As mining starts to boom, vacancies are becoming more and more difficult to fill. Human resource departments have to become more creative on how they recruit and who they look for. For example, geologists, engineers, and mine technicians are extremely difficult to find. These positions are very important in mining, as they help define and implement the mine layout and plan. At times it is difficult to recruit mine technicians with previous mining background and experience. We have started to recruit mechanical engineers, civil engineers and environmental technicians to fill these vacancies. Again, their skills are transferable to mining. They have learned how to survey in different environments and are able to apply those skills to mining.

-HR Executive, Regional Mining Company



² Livio DiMatteo, *An Assessment of the Economic Impact of an Aging Workforce in Northwestern Ontario Using Survey-based Data*, North Superior Training Board, 2004.

Fact from Fiction

While negative perceptions about hiring older workers still exist, a series of newly issued reports based on recent surveys challenge the conventional beliefs that many people have. The reports find that older workers tend to have a more positive attitude about the workplace than do those from younger generations, are eager to enroll in training courses, and expand their knowledge and, in many cases, are more than willing to devote their later years to full-time jobs in fields that matter to them.

For example, a recently released report from the American Association of Retired People (AARP) revealed that 79 percent of older workers are satisfied with the training programs offered to them and that older workers participate in these programs in large numbers. In addition, 93 percent said that they enjoyed learning new things and 77 percent said they were seeking work-related education.

Many believe that at least some misconceptions about older workers and their willingness to expand their knowledge and participate fully in the workplace stem from the use of the word "older" itself as well as from another term - "working retired." In light of this, the term "encore career" is growing in popularity.

A report from the American Business and Older Employees, AARP, Bureau of Labour Statistics summarizes the top seven myths about older workers and the corresponding reality as follows:³

Myth	Reality
It is difficult to train older workers ("You can't teach an old dog new tricks")	Studies show that there is only a negligible loss of cognitive function in older workers. While older workers take longer to absorb completely new material, their better study attitudes and accumulated experience lower training costs. The fastest growing group of Internet users is people over 50.
Training older workers is a lost investment because they will not stay on the job for long.	The future work life of an employee over 50 usually exceeds the life of the new technology for which the workers are trained.
Older workers are not as productive as younger workers.	Overall productivity does not decline as a function of age. Productivity can actually rise due to greater worker accuracy, dependability and capacity to make better on-the-spot judgments. Older workers' production rates are steadier than those of other age groups.

³ AARP, *American Business and Older Employees: A Summary of Findings*, 2000, http://assets.aarp.org/rgcenter/econ/amer_bus_findings.pdf.

Myth	Reality
Older workers are less flexible and adaptable.	Older workers are just as adaptable once they understand the reason for changes. They are more likely to ask why because they have often seen past changes in processes and procedures abandoned mid-stream when they didn't bring expected rewards quickly enough.
Older workers are not as creative or innovative.	General intelligence levels are the same as younger workers. Eighty percent of the most workable and worthwhile new production ideas are produced by employees over 40 years old.
Hiring older workers costs more than hiring younger workers.	While workers with tenure are entitled to more vacation time and pension costs related to the number of years worked, replacing workers is not cost free. Aetna Insurance Company did a study of this issue and discovered that hiring costs added 93 percent to the first year's salary of new employees.
Benefit and accident costs are higher for older workers.	Total sick days per year for older workers are lower than those for other age groups because older workers have fewer acute illnesses and sporadic sick days. While individual older workers' health, disability and life insurance costs do rise slowly with age, they are offset by lower costs due to fewer dependents. Overall, fringe benefit costs stay the same as a percentage of salary for all age groups. Older workers take fewer risks in accident-prone situations and statistically have lower accident rates than do workers in other age groups.

Four Generations in the Workplace

Today, employers often have four generations making up their workforce. While everyone is unique, understanding some of the general characteristics of these four generations will help employers to:

- Better target older workers in their recruitment techniques;
- Reduce conflict in the workplace and, thus, improve retention; and
- Build more effective workplace teams.

Understanding the characteristics of each generation more fully may also lead to the creation of successful mentoring programs. Older workers are often happy to share their knowledge and experience with others. It's a role that many enjoy and are good at. Be sure to define your goals and expectations when setting up the program and communicate them to all employees.

For a simple way to evaluate generational diversity in your company, please see the form contained in Appendix A.

Webster's Collegiate Dictionary 10th Edition:

Generation: The average span of time between the birth of parents and that of their offspring.



Traditionalists

Traditionalists, also called Matures or Silents, were born before 1945. This generation had its values shaped by the Depression and World War II.

- Traditionalists have a strong sense of duty, sacrifice, and loyalty toward companies and often don't understand those who don't share this attitude.
- Traditionalists aren't likely to rock the boat, break the rules, or disrespect authority.
- Traditionalists aspire for security and, as such, look to stay with their employers until they retire.
- Traditionalists believe that quality and attention to detail are more important than speed and "the bottom line."

Baby Boomers

Boomers were born between 1946 and 1966. This was an era of dramatic change, with many participating in activities that challenged authority, giving them a sense of empowerment. The term "workaholic" was coined for this generation.

- Baby Boomers are known for their very strong work ethic.
- Because they worked long and hard throughout their career, many Boomers are now rethinking their lifestyle, looking for a better work/life balance.
- Boomers value personal growth, individuality and equality of the sexes.
- Boomers question authority and have led a trend toward less-hierarchical work structure.

Generation Xers

This group was born between 1967 and 1980. Gen Xers saw the impact of their parents' "workaholic" lifestyle and they vowed to take a different path. A small group, they are sometimes referred to as the "baby bust."

- Generation Xers are self-reliant, optimistic, and confident.
- Gen Xers value education, independence and parenting above work.
- Gen Xers do not have a strong loyalty to an employer.

Millennials

Millennials were born between 1981 and 2000. They are also known as the "Internet generation", an acknowledgment of the high speed era in which they were raised. This is the largest generation since the Boomers and, more than the three others, this is the generation that is causing employers to have to rethink their demands.

- Millennials are used to having been listened to and catered to by their parents.
- They have short attention spans but aim to work faster and better.
- They are used to and comfortable with multitasking and immediacy.
- They are seeking flexibility in the workplace – including telecommuting and the ability to leave temporarily to take care of children.

Older workers bring a wealth of knowledge and experience to the workplace. They usually have built a strong network base that they can draw upon to be successful in the workplace. They are good role models and mentors for new and younger employees while continuing with their own learning.
-Senior Executive, Northwestern Ontario Health Care Business.



WORKFORCE PLANNING

Workforce planning helps to ensure that employers have the staff they need when they need them. The following are some recommended steps to take when planning your workforce:⁴

1. Develop or review your company's strategic plan to determine your objectives for the future.
2. Analyze and chart your current workforce including numbers, skills requirements, demographics, etc. How many will be retiring? What is your current turnover rate?
3. Review, estimate and chart your workforce needs for specific timeframes such as two, five and ten years based on your strategic objectives. Will the skills and size of the workforce remain the same or will they change?
4. Identify gaps and challenges to overcome in closing those gaps.
5. Develop a plan that includes actions, leadership and timelines in the areas of:
 - Succession planning;
 - Retention; and
 - Attraction.
6. Set achievable workforce planning goals.
7. Identify resources needed and where to go for support in achieving goals.
8. Set a timeline and strategy for monitoring of progress.
9. Communicate regularly with employees on workforce planning issues and keep them informed on the role they may play in changing workforce dynamics.

A sample of a workforce planning questionnaire for employers and employees, reproduced with the kind permission of the London Economic Development Corporation are found in this kit in Appendices B and C.

⁴ London Economic Development Corporation, *Experience Works: Steps in Workforce Planning*, 2006, <http://www.experienceworks.ca/pdf/workforceplanning.pdf>.

AGE-FRIENDLY THUNDER BAY

Age-Friendly Thunder Bay is a committee of dedicated stakeholders who want to ensure that Thunder Bay is a good place in which to grow old. The participants work together to create a vision, communicate and educate; support research and information dissemination; establish priorities for action; provide advice to city and community partners and coordinate initiatives to optimize the use of resources. The committee includes members of the older adult population along with members of local organizations that support older adults and who are committed to older adult issues.

The goal of Age-Friendly Thunder Bay is to have Thunder Bay recognized as an “Age-Friendly City” by the World Health Organization (WHO) by becoming part of the WHO Global Network of Age-Friendly Cities. An Age-Friendly City is accessible, inclusive and supportive of its older citizens. It offers the following supports for older adults:

- Values, diversity, choice and independence;
- Inclusive and accessible community resources; and
- Specialized seniors’ services.

The time is right for Thunder Bay to become an Age-Friendly City. Our aging population is more educated, financially secure and influential than ever before. These citizens will induce changes at all levels within the city. In addition, promoting quality of life and independence for seniors now will prevent the need for more costly municipal support programs later.

The benefits of Thunder Bay becoming an Age-Friendly City are numerous. We will be one of the first cities in Ontario to be recognized as a model for age-friendliness. This will contribute to the growth of our economy and our positioning as a city that is inclusive.

Research indicates that in Thunder Bay:

- Older people feel respected;
- There are pleasant outdoor spaces for walking and recreation;
- There are opportunities for meaningful involvement through volunteerism;
- There are many opportunities to stay active;
- There is an affordable cost of living; and
- There are many cultural activities.

There are, however, also some barriers including:

- Lack of choice in affordable housing options;
- Lack of affordable and accessible transportation;
- Lack of safe neighbourhoods;
- Lack of easy access to information;
- Shortage of opportunities for meaningful involvement through employment; and
- Not feeling involved with municipal government.

On May 10, 2010, Thunder Bay City Council members endorsed the recommendation that Thunder Bay become an Age-Friendly community. As a champion of this initiative, Thunder Bay is one of the first cities in Ontario to be recognized with the Age-Friendly title, and is now well positioned to become internationally recognized as part of the World Health Organization’s (WHO) Global Network of Age-Friendly Cities. Becoming age friendly also recognizes the social and economic contribution of Thunder Bay’s older people and the growing economic opportunities of providing goods and services for our aging population.

There are four steps in becoming part of the WHO global network:

FOUR STEPS
<p>1. <i>Establishment of mechanisms to involve older people in all stages of the Age-friendly Cities (AFC) process. Cities are also encouraged to build partnerships with government and civil society (including non-governmental organizations and academic institutions).</i></p>
<p>2. <i>Development of a baseline assessment of the age-friendliness of the city. This assessment can be flexible to take into account the diversity of cities, however at a minimum, it needs to consider each of the eight domains identified in the WHO Age-friendly Cities Guide.</i></p>
<p>3. <i>Development of a 3 year city-wide action plan based on the findings of this assessment.</i></p>
<p>4. <i>Identification of indicators to monitor progress against the plan.</i></p> <ul style="list-style-type: none"> 1. outdoor spaces and buildings, 2. transportation, 3. housing, 4. social participation, 5. respect and social inclusion, 6. civic participation and employment, 7. communication and information, and 8. community support and health services
<p>It is anticipated that the action plan will link to other municipal instruments to ensure that age-friendliness becomes a core responsibility for all municipal departments.</p>

The Age-friendly stakeholder committee has already completed the first two steps and has met with the city administration to determine how Step 3 and 4 will be met.

RESOURCES FOR EMPLOYERS

Local and Regional Resources

It's a good idea to become familiar with organizations that are helping older workers find jobs and those that can assist you in other ways. These are:

Lakehead Employment Services

Employment Services

280 Park Avenue

Resource and Drop In Centre

277 Park Avenue

Thunder Bay, Ontario

P7B 1C6

Telephone: (807) 768-2700

Toll Free: 1-877-255-5231

www.lestbay.com

Lakehead Employment Services has been delivering employment assisted services since 1997, utilizing a "Customer Centric" approach that continually focuses on the best interests of the customer and the delivery of the program.

LES provides one-on-one employment counselling to assist with job search, résumé and cover letter preparation, interview skills and career planning, resource and information centre services for job seekers and employers, job matching, placement and incentives, Second Career as well as other training supports as well as workshops and seminars including life skills and mental health counselling.

The newest initiative at LES is the Targeted Initiative for Older Workers ages 55-64 (TIOW) which is a joint federal-provincial initiative intended to provide unemployed older workers with programming aimed at increasing their employability and reintegrating them into employment.

More Than Words, Job Search Centre and Employment Counselling

101 King Street

Longlac, ON

P0T 2A0

Telephone: 807-876-4222

www.mtwjobassist.ca

203 Main Street

Geraldton, ON

P0T 1M0

Northwest Employment Works (NEW)

Confederation College

Shuniah Building

1450 Nakina Drive

Box 398

Thunder Bay, Ontario

P7C 4W1

Telephone: (807) 473-3829

30 Earl Avenue

Dryden, Ontario

P7N 1X6

Telephone: (807) 223-4006

52 Peninsula Rd.

North Block, Suite 111

Marathon, Ontario

P0T 2E0

Telephone: (807) 229-3223

<http://www.northwestworks.ca/>

NEW is an Employment Assessment Centre for Employment Ontario.

NEW delivers the Employment Service which provides:

- A wide range of resources, supports and service components to respond to the career and employment needs of individuals;
- Human Resources planning services to satisfy the skilled labour needs of employers; and
- Help to individuals on a path to higher skill training and employment

Whether you are looking to.....

- Retrain
- Start your own business
- Find a job
- Hire new staff
- Attend a workshop

...friendly NEW staff members are available to help you start something new.

The District of Thunder Bay Social Services

Ontario Works

34 North Cumberland Street, 4th Floor

Thunder Bay, Ontario

P7A 8B9

Telephone: (807) 766-2111

Toll Free: 1-877-281-2958

Ontario Works Employment Resource Centre (ERC)

Victoriaville Mall

707 Victoria Avenue

Thunder Bay, Ontario

P7C 5X9

Telephone: (807) 625-2887

Fax: (807) 624-0052

Municipality of Greenstone (includes Beardmore, Longlac, Nakina)

PO Box 1537, 1000 Main Street

Geraldton, Ontario

P0T 1M9

Telephone: (807) 854-2511

Township of Manitouwadge (includes Marathon)

1 Mississauga Road

Manitouwadge, Ontario

P0T 2C0

Telephone: (807) 826-4809

Toll Free: 1-888-3936947

Township of Schreiber (includes Nipigon and Terrace Bay)

204 Alberta Street

Schreiber, Ontario

P0T 2S0

Telephone: (807) 824-1369

Toll Free: 1-888-393-8953

<http://www.tbdssab.on.ca>

Ontario Works, under the Thunder Bay District Social Services Administration Board (TBDSSAB,) offers employment support programs for workers of all ages through the Ontario Works Employment Resource Centre (ERC) located in Victoriaville Mall in Thunder Bay. The following programs are available to participants of the Ontario Works program:

- Employment Placement Program

This program helps job-ready participants find paid employment by off-setting employer hiring and training costs with a wage/training subsidy. Financial support is

available for transportation, child care and other employment related expenses to help in the job search process and to maintain employment secured through this program. TBDSSAB has a placement agreement with a community agency that helps participants to find jobs with employers in the community.

- Various short term training programs are also available such as WHMIS, Smart Serve, Customer Service Training, Janitorial Training, Safe Food Handling and ACCEPT (Life Skills Training).
- Self employment business development may also be an avenue that participants may be supported with through the ERC also.
- Additional services available at the ERC are faxing, photocopying, job board, internet access for job searching and resume development. .

Scandcorp Employment Resource Centre

975 Alloy Drive, Suite 101
Thunder Bay, Ontario
P7B 5Z8
(807) 638-1760

A growing number of Scandcorp's clients are older workers—approximately 65 percent of its total client base. Scandcorp is a free self-help employment resource centre providing access to computers, printers, faxes, one-on-one résumé help, practice interviews, internet job searching skills, labour market information and skills assessment tools.

YES Employment Services

1116 Waterford Street
Thunder Bay, Ontario
P7B 5R1
Telephone: 807-624-1958
Email: resource@yesjobsnow.com
www.yesjobsnow.com

The YES Resource Area Service is open to job seekers of all ages. Workers 55 and older can choose to access the Targeted Initiative for Older Workers program, an Employment Ontario program funded in part by the Government of Canada. This initiative is intended to assist older workers, reintegrate them into employment and allow them to remain active and productive labour market participants. The program provides a variety of employment supports that are intended to directly address identified needs.

www.yesjobsnow.com/assets/files/TIOW.pdf

The TIOW program can also be accessed by individuals in communities East of Thunder Bay at our North Shore Communities Office. The North Shore Communities' Resource Area is also open to all job seekers.

YES Employment Services- North Shore Communities

177 Railway Street

Nipigon, Ontario

P0T 2J0

Telephone: 807-887-5465

Email: nsc@yesjobsnow.com

More Resources:

Human Resources and Skills Development Canada

<http://www.hrsdc.gc.ca/>

Service Canada – Training, Career and Worker Information

<http://www.jobsetc.ca/eng/>

Employment Ontario

<http://www.edu.gov.on.ca/eng/tcu/etlanding.html>



RECRUITMENT AND RETENTION STRATEGIES

It's How and Where You Say It

The successful recruitment of older workers calls for non-traditional recruiting strategies.

Images and words play an important role. In the publication *Working Longer: New Strategies for Managing, Training and Retaining Older Workers*, the authors point out that how a recruitment advertisement is worded tends to produce an image in the mind of a would-be applicant of the type of person the employer is looking for. They used the following

two examples of recent online advertisements, the first appearing to be geared more to younger applicants, the second to older ones:⁵

Are you an energetic take-charge person with excellent communication skills?

- Post all month-end journal entries and closing
- Produce month-end management reports
- Cash flow analysis
- Preparation of financial statements
- Payroll management
- Proficiency in Excel a must
- Bachelor's degree in accounting or finance
- Minimum of 5 years experience
- Ability to demonstrate good judgment and exercise discretion and confidentiality pertaining to the work environment a must

APPLY:
XY Company
10 Main Street,
Tel: 444-555-1212

One of the city's best public companies to work for needs an experienced dependable

PAYROLL CLERK

Excellent working conditions, great benefits and convenient location. Will produce paychecks for about 1000 people, update computer files and perform other payroll functions. Super opportunity to take your payroll experience to the next level and have future career opportunities based on your hard work.

XY Company
10 Main Street, Anytown, ON • Tel: 444-555-1212

Many employers successfully recruit older workers by placing their recruitment materials where older people go such as seniors' centres, malls, churches and seniors' organizations.

TIP: The Lakehead Social Planning Council's website has an extensive list of local resources for seniors. Go to www.lspc.ca, Community Resources and Info.

Billing your business as an "equal opportunity employer" or one that "values workers of all ages" should be effective in recruiting older workers as well.

Finally, to help ensure that your recruiting practices do not discriminate against older workers, consider the following additional points:

- Ensure that the interview committee represents, if possible, the four generations in the workplace
- Do not set upper limits on experience
- Base decisions on the enthusiasm, experience and commitment of candidates rather than on their age

⁵ William J. Rothwell, Ph. D. et al., eds., *Working Longer: New Strategies for Managing, Training and Retaining Older Employees* (American Management Association, 2008).

The Ageism-Free Workplace

Ageism refers to the systematic stereotyping and discrimination of individuals or groups because of their age. The term was coined in 1969 by US gerontologist Robert N. Butler to describe discrimination against seniors, comparing it to sexism and racism.⁶

An ageism-free workplace can be characterized as follows:

- From the Top Down – Leadership is diverse and respectful of all generations;
- Teamwork – All employees value each other, no matter what age;
- Understanding – There is a thorough understanding of what older workers need and want, as well as what motivates them; and
- Training – Opportunities for growth are offered to all workers.

Ageism in the workplace is often unintentional. An attitude of ageism can stem from something as simple as making comments such as, "We need to bring in some young guns" or "Don't be an old fogey."



⁶ Robert N. Butler, *The Longevity Revolution: The Benefits and Challenges of Living a Long Life* (Public Affairs, March 2008).

Workplace Wellness

Older workers undergo a number of physical changes as they age, most of which can be accommodated. It is therefore important to consider these workers' workplace health and ergonomic needs.

Some companies, to reduce musculoskeletal disorders and other workplace injuries, hire occupational health professionals to assess potential problems for workers, and have them recommend changes to workstations. Others have incorporated safety and wellness training for new hires and health-related seminars into their programming.

Age-Related Change ⁷	Recommended Actions
Injuries from repetitive loading, twisting of torso, rapid lifting	<ul style="list-style-type: none"> • Redesign workstation • Adjust work-surface heights • Provide lifting aids • Provide rest • Provide good foot traction
Carpal tunnel syndrome	<ul style="list-style-type: none"> • Pay attention to seat height and width • Redesign workstation • Redesign tools • Provide proper room temperatures • Provide instruction in proper use of equipment
Changes in vision	<ul style="list-style-type: none"> • Install soft white reader bulbs • Install glare free screen monitors • Install adjustable light sources • Use more contrast on visual materials • Use larger black print on white screens • Increase illumination • Be consistent with lighting levels • Design workstations with lighting focused on key areas
Changes in hearing	<ul style="list-style-type: none"> • Eliminate possible echoes • Enhance visual cues of communication • Place seating arrangements to accommodate those who are hard of hearing • Limit group size

⁷ William J. Rothwell, Ph. D. et al., eds., *Working Longer: New Strategies for Managing, Training and Retaining Older Employees* (American Management Association, 2008).

Training and Retaining

While many employers train younger workers, they do not offer similar training experiences to older workers either in the belief that people in this age group are difficult to train or, as they near retirement, may not want to be trained. The truth is that older workers want to be treated the same as the younger workers and, if offered training, can still add considerable value to the company.

Employers may need to re-think how training is offered recognizing that some older adults may need to be trained in a different way such as through face-to-face learning or e-learning. The following are some tips to keep in mind when planning your older worker training program:⁸

- Go easy on the eyes: Use a 14-point font, such as Arial, to make reading easier from printed materials, handouts, and slides. Also offer breaks at strategic times so participants can take breaks as needed without embarrassment.
- Devona E.G. Williams, President and Chief Executive Officer, Goeins-Williams Associates, Inc., Clayton, Del.
- Divide and conquer: Since older workers are accustomed to working well in teams, break up participants into small groups. Their comfort level typically increases, which makes them more open to learning. But they don't enjoy role-playing and can become resistant to learning if this methodology is used.
- Cathy A. Rodgers, President, RPG, Guttenberg, N.J.
- Cross bridges: Some older workers may become fearful, resistant, or anxious when learning something new. Boost their confidence by inviting their participation and validating their experiences, comments, or suggestions so they become more open to learning.
- Joan Hoey, Principal, Hoey Training Associates, Branford, Conn.
- Make the unfamiliar comfortable: Technology is not always older-worker friendly. Consider playing a game like Concentration that helps them first learn the vocabulary of the technology. Create a deck of cards with different words or phrases that participants must match to definitions and to the functions of the technology. The exercise will create self-confidence, reinforce necessary vocabulary, and make it easier for them to learn difficult concepts later on. "A few [older participants] spoke to me after a training session to tell me how much the variety of activities that I presented helped them learn more easily."
- Patricia Reuss, Director of Training Development, Renaissance Training, San Francisco

⁸ AARP, *Tips for Training Older Workers*,
http://www.aarp.org/money/careers/employerresourcecenter/recruitment/tips_for_training_older_workers.html.

- Use analogies or correlations: To help people understand new concepts or practices, compare them to common participant experiences. For example, when training older workers about Random Access Memory (RAM), which is information that computers store on a temporary basis, the example of grocery shopping was used. When people make a mental grocery list, it's temporarily stored in the person's memory, which is similar to RAM. Once the items are placed in their cart, it's deleted from their memory. This analogy helped participants understand this abstract concept.
- Valerie K. Ginyard, VKG Associates, Glenside, Pa.
- Apply their past: During the workshop or seminar, ask participants, "What does this remind you of from your former jobs or personal experiences?" Then build on those experiences to enhance their understanding of the topic and comfort level.
- Larry E. Webb, President, The Kilgore Group, Winter Garden, Fla.
- Offer hands-on experience: When feasible, schedule time during the workshop for all participants to apply the new skill, information, or technique they just learned to a real situation or business problem. For instance, when conducting live cold call training, do hands-on demonstrations of the techniques you're teaching. Ask participants to make a live cold call while you coach them. They'll better understand how to apply the information and become more successful and confident at using it, since you can coach them from the sidelines.
- Ron La Vine, President and CEO, Accelerated Sales Training Inc., Oak Park, Calif.
- Set the stage: If you're trying to change long-established patterns of behaviour, start with a fun exercise that focuses on how difficult changing behavior can be for some people. Ask participants to change their watch, bracelet or ring to the opposite wrist or hand and leave it there for the rest of the day. Ask them how it feels. You'll hear words like "awkward," "weird," or "different." Or, discuss how the workplace has changed over the past 20 years. Make a long list. Most will agree that it has changed dramatically, and therefore, they better understand why their thinking, beliefs, and work habits also need to adapt to the changing times.
- Dick Cipoletti, President, RCC Associates, Allentown, Pa.
- Level the playing field: Ask participants to write down something they recently learned from a much younger or older person. Then ask them to share those experiences. This demonstrates that people can learn from each other regardless of age and that no one knows it all, whether they're 25 or 65.
- Elizabeth Power, CEO, EPower & Associates Inc., Nashville, Tenn.

David Farrell, 57, is a person who has come full circle in adjusting to the knowledge economy from working in big business as a Quality Assurance Coordinator at Bowater Canadian Forest Products to managing his own businesses to returning to the education sector.

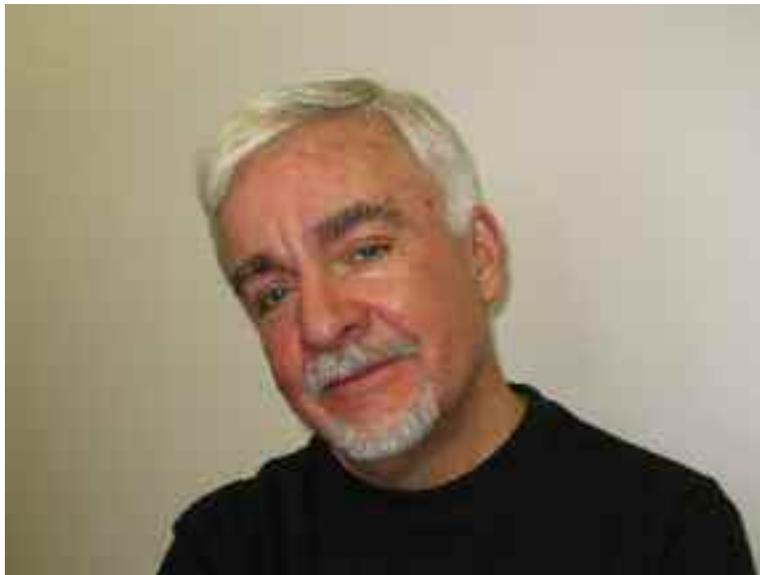
Farrell chose to leave his position at Bowater at the end of 2006 with a deferred pension after 30 years with the company.

"I saw the situation in the forestry sector as an opportunity rather than a threat. I could follow my dreams and at the same time allow a younger employee to keep a job, so I decided to go for it," he said.

Taking six courses and working part-time at the university certainly posed challenges but he earned his degree with a First Class Standing.

He is currently a Career Services Officer for the Office of Career and Co-operative Education Services and doing community outreach for the Office of Continuing Education and Distributed Learning at Lakehead University where he gets to share his experiences and expertise with others. He is also a successful consultant, advising on a range of business issues. A huge supporter of his community, Farrell also serves on an impressive number of committees.

Farrell's advice? "Employability is about being able to demonstrate lifelong learning. Success is earned. Keep the faith."



Dave Farrell

Collective Agreements

Because flexibility is so important in attracting and retaining older workers, employers will need to be vigilant with respect to collective agreements. A study commissioned by Human Resources Development Canada in 2002 entitled *Collective Agreements and Older Workers in Canada*⁹ highlighted seven key issues around collective agreements:

- Work-time arrangements are a major determining factor of the working conditions of all workers and of older workers in particular. Older workers may need additional flexibility with respect to work schedules, limits on the use of shift work and overtime, job sharing and other work reduction opportunities, and special consideration (exemptions or preference, where possible) in the implementation of provisions pertaining to work-time arrangements. Although they may not have been negotiated with older workers in mind, collective agreement provisions dealing with these arrangements reflect the concerns of a large proportion of older workers. Such provisions show the responsiveness of employers and unions to the needs and concerns of workers, including older workers seeking more flexibility in the workplace.
- In today's workplace, work intensity and work pressures are rising, and are likely to continue to rise in various ways due to a series of technologically-related factors and other workplace developments. All these factors are contributing to increased workload and stress. Leaves of absence are becoming an indispensable tool to fight stress on the job as well as stress from other sources. They provide workers in general, and older workers in particular, with temporary periods of relief from work.
- There are numerous benefits to both employers and employees in providing on-going training and education opportunities. While nothing specifically targeting older workers was contained in the collective agreements that were examined at the time the study was conducted, it was found that, since access to these types of opportunities is almost always based on seniority, older workers were often in an advantageous position for training and education opportunities.
- Economic security is an important issue for older workers. Collective agreements contain seniority as well as job and income security provisions designed primarily to give employees an equitable measure of economic security based on their length of service. Seniority rights are used to determine many working conditions (e.g., layoff, recall, promotion). Agreements that contain broader seniority units (i.e., plant-wide as opposed to department-wide) may be more beneficial to older workers.
- Discrimination in the workplace is a serious issue. Many laws have been enacted and many regulations have been adopted in order to minimize, if not completely eliminate, all types of discrimination. For obvious reasons, the specific issue of

⁹ Michel Fourzly and Marc Gervais, *Collective Agreements and Older Workers in Canada* (Human Resources Development Canada, 2002).

age-based discrimination is of concern to all older workers. Provisions designed to counter this type of discrimination, as well as affirmative action measures designed to ensure employment equity for older workers, appear in major Canadian collective agreements. These provisions aim to guarantee that older workers are given the same consideration and employment opportunities as other workers. However, employers and unions must remain mindful of the way in which certain potentially discriminatory clauses are used.

- Older workers need to adequately prepare for life after work. Major Canadian collective agreements reflect this need and contain provisions that specifically deal with the work-to-retirement transition. Contract clauses dealing with pre-retirement leave or vacations and retirement counselling programs are two such examples. Furthermore, collective agreements increasingly contain programs that allow employees to ease into retirement by gradually reducing the number of hours worked.

At the age of 57 years and 363 days, Brian Stimson set off on a new career path—a move that would prove to be one of the best decisions of his life.

Stimson started his career in the mining sector and stayed until the open pit operation he was employed at closed. Assured that forestry was then "the way to go," he made the move into that sector, remaining for 27 years until the business he was working at went into receivership.

Reluctant to leave his home in Atikokan to work elsewhere, Stimson began volunteering at the local Action Centre and it was there that he heard about how many people who had taken the four-week common core course in Sudbury had found good jobs.

That was enough of a motivator for Stimson. He graduated in August, 2008 and not long after was hired as a stationary backhoe operator at Goldcorp Canada's Musselwhite Mine on the shore of Lake Opapimiskan, 480 kilometres by air north of Thunder Bay. Goldcorp is, says Stimson, an outstanding employer.

"The food is unreal, the work is great and the recreation facilities are amazing," he says.

He works for two weeks and then goes home to Atikokan for another two, an arrangement he says he and his wife are starting to adjust to.

His advice for people his age who become unemployed?

"Don't give up. If there's anything good that comes out of a bad situation like losing a job it's that you get a chance to further your education. For the longest time I wondered who would hire me at my age but it worked out great for me."



Brian Stimson with grandson Kaleb

TIPS FROM THE EXPERTS

Best Practices

Various experts recommend that any business or organization interested in preparing for the aging workforce of the future complete an assessment of whether or not it is "older worker friendly." The following sample self-assessment tool has been provided by the Wisconsin Department of Workforce Development.¹⁰

Older Worker Friendly Employer Assessment Tool

Take this simple assessment to find out if you offer an environment that is attractive to older workers.

Each line that you check represents an older worker friendly characteristic that was identified, by older workers in Wisconsin, as something likely to attract and retain older workers to an employer.

Please put a checkmark on the lines of items that apply to your organization:

Recruiting			
We state in our job advertisements that we seek employees with:		We are familiar with organizations and agencies that:	
Maturity	<input type="checkbox"/>	Help older workers find jobs	<input type="checkbox"/>
Good Judgment	<input type="checkbox"/>	Provide training for older workers	<input type="checkbox"/>
Work Experience	<input type="checkbox"/>		
Hiring, Retention, Evaluation and Promotion			
We provide older worker new hires and job candidates with the following information addressing issues of particular interest to older workers:		We conduct "age audits" of our organizations to help identify possible barriers to:	
Flexible benefits	<input type="checkbox"/>	Equal hiring	<input type="checkbox"/>
Alternative work schedules	<input type="checkbox"/>	Promotional opportunities	<input type="checkbox"/>
Workplace accommodations	<input type="checkbox"/>	Training for older workers	<input type="checkbox"/>
We periodically review our organization policies and practices as they relate to older workers:		We educate our managers, supervisors and interviewers on:	
Recruitment	<input type="checkbox"/>	Age discrimination laws	<input type="checkbox"/>
Hiring	<input type="checkbox"/>	Age neutral performance appraisal systems	<input type="checkbox"/>
Training	<input type="checkbox"/>	Age neutral accessibility to training	<input type="checkbox"/>
Evaluation	<input type="checkbox"/>	Benefits of hiring and promoting older workers	<input type="checkbox"/>
Promotion	<input type="checkbox"/>		
Termination	<input type="checkbox"/>		
We educate the following populations about age stereotypes:		We educate the following employees about assessing and redesigning jobs for workers with special needs:	
Managers	<input type="checkbox"/>	Managers	<input type="checkbox"/>
Supervisors	<input type="checkbox"/>	Supervisors	<input type="checkbox"/>
Lead staff	<input type="checkbox"/>	Lead Staff	<input type="checkbox"/>
Workers	<input type="checkbox"/>		
Employee Training			
We provide flexible training opportunities including:		We provide the following basic training for our employees, including older workers:	
A mentoring program	<input type="checkbox"/>	Technical	<input type="checkbox"/>
Job rotation	<input type="checkbox"/>	Computer	<input type="checkbox"/>
On-the-job coaching	<input type="checkbox"/>		
Peer training	<input type="checkbox"/>		
Internships	<input type="checkbox"/>		
Individualized training	<input type="checkbox"/>		

¹⁰ Wisconsin Department of Workforce Development, *Older Worker Friendly Employer Assessment Tool*, http://www.dwd.state.wi.us/oldenworker/pdf/OW_Assess_Tool2.pdf.

Accommodations

We educate the following employees about assessing and redesigning jobs for workers with special needs:

- Managers
- Supervisors
- Lead staff

We provide, as needed, the following equipment to assist employees in performing their jobs:

- Amplified telephone equipment
- Computer screens for visual enhancement
- Special/ergonomic keyboards
- Flexible workstations (i.e. alternate between sitting and standing)

Compensation and Benefits

We offer alternatives to full time work:

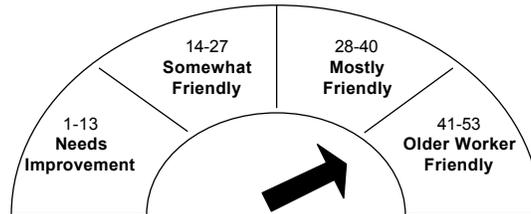
- Part-time work
- Temporary work
- Seasonal work
- Consulting
- Job sharing
- Flex-time
- Flex-pace
- Compensatory time

Our benefit package takes into account that our older workers may desire a different set of benefits than those of other workers.

We offer similar or pro-rated benefits to our part-time employees as we offer to our full time employees.

Total all check marks

Older Worker Friendly Employer Gauge: Add up your checkmarks.
 If your total was 1-13=you are in real need of improvement, 14-27=you are somewhat friendly to older workers, 28-40=you are mostly older worker friendly, 41-54=you are older worker friendly.



The authors of *Working Longer* suggest that following the self-assessment exercise, the heads of organizations and businesses of all sizes take the following steps:¹¹

Small Businesses/Organizations

- Conduct age diversity training for all managers and staff to include myths vs. facts on older worker productivity, absenteeism, turnover, job-related injury, working speed, management of intergenerational workforces and technology adoption.
- Conduct training for all staff involved in recruiting regarding recruitment of older workers on such issues as communications, respect, attitude towards overqualifications.
- Provide pension "catch up" contributions.
- Establish leave banks to allow employees to donate leave days to co-workers.
- Revise HR policies to provide: flexible work hours, flexible seasonal schedules, seasonal geographic reassignment (e.g., for "Snowbirds").

¹¹ William J. Rothwell, Ph. D. et al., eds., *Working Longer: New Strategies for Managing, Training and Retaining Older Employees* (American Management Association, 2008).

- Revise HR policies to provide age-neutral opportunities for training.
- Design training with older learners in mind when possible.
- Identify critical skills and knowledge and identify the workers who possess them.
- Use contrasting colours on graphs and charts.
- Institute succession planning and mentoring programs at all levels.
- Conduct an analysis of all essential job positions and determine who has the knowledge and skill that is essential to organizational performance/competitive advantage.

Mid-Size Businesses and Organizations

- Conduct surveys on broader workplace issues and analyze the results by age group. Address older worker issues that are identified.
- Establish an older worker advisory group.
- Conduct a human capital analysis to develop a picture of staff's plans to retire and the skill/knowledge base that may be affected.
- Conduct a survey of older workers to determine the reasons for retirement.
- Develop incentives to respond to older workers' reasons for wanting to retire.
- Evaluate the language of recruiting advertisements.
- Review pension plans to eliminate disincentives for phased-in retirement.
- Structure benefits packages to allow for employee options including long-term care, prescription drug coverage etc.
- Encourage managers, older workers and HR staff to negotiate working arrangements that will accommodate the needs of both the workers and the employers.
- Base benefits policy decisions on sound human capital planning research (e.g., there is evidence that for every \$1 an employer spends assisting employees with elder care issues, \$3-\$5 is saved in productivity).
- Use early retirement subsidies only after a skill/knowledge assessment that identifies who holds the essential skill/knowledge in customer relations, operations and management.
- Encourage healthy lifestyles and provide:
 - Workout facilities and classes or discounted health club memberships;
 - Opportunities to encourage laughter;
 - More healthful snacks in vending machines and employee cafeterias;
 - Quiet rooms;
 - Work life assistance programs;
 - Health fairs/health risk assessments;
 - Nutritional counseling; and
 - Financial incentives for weight loss and smoking cessation.
- Take steps to retain the knowledge including mentoring programs.

Large Businesses and Organizations

- Conduct a thorough skill/knowledge risk assessment.
- Identify critical skills and knowledge.
- Identify workers who possess these critical skills and knowledge.
- Determine the retirement projections for those workers.
- Negotiate retention programs for employees at risk.
- Implement a knowledge management system like the AskMe Inc. approach used by Eli Lilly and Company (www.askmecorp.com/pdf/Lilly-CS.pdf).
- Record critical processes on video.
- Develop an inquiry network.
- Engage in public policy debate.
- Develop a civic engagement program to engage retirees and active employees in community-related activities.
- Conduct a research study to establish the true cost of older workers relative to other age cohorts.
- Invest in ergonomic studies and workplace design changes needed to maximize the productivity of older workers.

Employers in the social service, healthcare and education fields may be especially well-positioned to lure older workers, according to the 2008 MetLife Foundation/Civic Ventures Encore Career Survey, conducted by Peter D. Hart Research Associates. The survey estimates that between 5.3 million and 8.4 million Americans between the ages of 40 and 70 have already launched "encore careers" -- second careers that "combine income and personal meaning with social impact." Of those workers ages 44 to 70 not already in encore careers, half are interested in them, specifically jobs in education, healthcare and the nonprofit sector.¹²



¹² Andrew R. McIlvane, *Refuting Perceptions of Older Workers* Human Resources Management, July 16, 2008, <http://www.hreonline.com/HRE/story.jsp?storyID=110454200>.

Examples That Will Inspire

In 2005, CARP, the national association for people 50 and older, announced the winners of the Best Employers for 50-Plus Canadians. A look at the approaches these employers took should provide inspiration to all employers:¹³

Carrier Trucks Centers Inc. of Brantford, Ontario operates four full-service international dealerships along the 400-series highways in Southwestern Ontario. Carrier won because of its commitment to the recruitment and retention of 50-plus individuals in all areas of its business.

Catholic Children's Aid Society of Toronto has over 600 staff, many of whom are over the age of 50. Because of its belief that a qualified and stable workforce provides the highest quality of service, it has developed a workplace culture that supports its staff, and promotes learning and recognition, leading to one of the highest retention rates among Children's Aid Societies.

The City of Calgary is a municipal government with 11,000 employees. Fifty percent of its employees are eligible to retire in the next 10 years. Along with numerous innovative benefits to support the retention of employees, the City of Calgary has, as part of its risk management activities, identified a need to retain a pool of employees with specific skills to provide their expertise back to the city. Its Rehirement Policy and retiree pool policy allows for smoother succession planning and knowledge transfer. The City of Calgary is the first of the municipal governments to implement this type of policy.

Direct Energy of Toronto is a leading North American supplier of energy and related services. Direct Energy uses its flexible internal environment and employee benefits to attract and retain 50 plus employees.

Excell Service of Penticton, British Columbia is a call centre capitalizing on the talents of the 50-plus worker. There are no retirement policies; employees can have flexible hours. Promotion of those over 50 is commonplace. Retirees find that the flexibility works for their pocketbook and lifestyle. Employee opinion surveys are used to improve management, employee practices and business.

Flexo Products of Niagara Falls supplies cleaning products of every kind to institutions, hotels and schools. After years of working with younger employees who turned over at a high rate, Flexo discovered that hiring mature workers made sense. They have an outstanding affect on production, an increase in safety and a measurable increase in productivity. Flexo also has no mandatory retirement.

¹³ CARP, *11 companies Named Best Employers for 50-Plus Canadians*
http://www.carp.ca/article_display.cfm?5_offset+2&documentID=1647. (September 19, 2005)

Home Instead of Toronto provides comprehensive, non-medical companionship and non-medical home-care services for seniors. Over 76 percent of Home Instead's caregivers are over the age of 50. Through its career development program, flexible hours for caregivers, a recognition program and contributions to their local communities, Home Instead has created a measurable model that leads to satisfaction of caregivers and clients alike.

Merck Frosst of Montreal is one of Canada's leading research-based pharmaceutical companies with a long record of innovation. Merck Frosst was a second-time winner of the award and is an example of competitive business and people practices offering value to their long-serving employees. Merck Frosst continuously creates new challenges by having employees rotate through numerous jobs throughout their career. Merck Frosst, with Revenue Canada's assistance, has developed an additional savings plan that is similar to an RRSP, thereby offering further opportunities for employees to save for their retirement.

Orkin/ PCO Services Corporation of Mississauga is a residential and commercial pest control service. With the increase in awareness and threat of West Nile Virus there is a great demand for the services of their skilled professional technicians. They introduced a more flexible part-time schedule with benefits in order to retain and attract those who would otherwise have retired or left the industry. This has led to retention of individual technicians and increased satisfaction and productivity within the organization.

Seven Oaks General Hospital of Winnipeg is an accredited, 275-bed acute care facility with a long tradition of promoting wellness and healthy lifestyles. Seven Oaks won this award because of its recruitment, retention workplace culture and management practices.

Toronto Auto Auctions of Milton, Ontario is a wholesale vehicle dealer auction that brings vehicle buyers and vehicle sellers together for an average of three auctions per week. Drivers operate well over 5,000 vehicles weekly. This company won for its recruitment of retired workers from all careers who wish to return to part-time employment. It offers flexible schedules that are customized for the mature worker and in return gets reliable workers. This business model assisted the growth of Toronto Auto Auctions and helps to ensure the safety of the vehicles entrusted to this company's care.

CONCLUSION

As Northwestern Ontario's population continues to age even more rapidly than that of the province as a whole, the time is right for all employers to take a closer look at their company's policies and practices regarding older workers—as well as their own attitudes and beliefs. This Resource Kit is intended to serve as a first step in that process.

Remember that there are numerous other resources available.

Increasingly, there are websites devoted to assisting both older workers themselves as well as their would-be employers. Some of these sites are mentioned in the kit but a web search will reveal numerous others.

In addition, make your needs known to the service providers listed in the kit. Many of them would be happy to assist you in the recruitment of suitable older workers.

Literature on the subject of older workers such as the *Working Longer* book cited in the kit can also provide valuable advice and guidance.

We wish you every success in your quest to recruit and retain older workers and to realize all the benefits that come from having older workers as a part of your workforce.

Remember that flexibility, understanding and an open mind are all keys to the attainment of your goals!



Appendix A



Evaluating Generational Diversity in Your Company

What percentage of your company's employees belong to each generation?

Traditional	_____	%
Baby Boomer	_____	%
Gen X	_____	%
Millennial	_____	%

What percentage of your company's management belongs to each generation?

Traditional	_____	%
Baby Boomer	_____	%
Gen X	_____	%
Millennial	_____	%

Is any generation under-represented? If so, why?

.....

Do you understand what motivates and inspires each generation?

Yes No

Have you built a generational approach into:

Recruitment approaches?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Retention efforts?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Reward programs?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Does the group that interviews prospective employees represent all generations?

Yes No

Are they aware and respectful of generational differences?

Yes No

Does your website reflect all generations?

Yes No

Does marketing material reflect and appeal to all generations?

Yes No

What steps can your company take to ensure that you are effective at attracting and retaining each generation? _____

.....

Appendix B - Workforce Planning Questionnaire

1. Does our organization have a strategic plan or vision for the next five to ten years that outlines our direction and focus? Yes No

Next steps in achieving a strategic plan: _____

Responsibilities: _____

2. Will the workforce we have today be capable of meeting our strategic goals in the next five to ten years? Yes No

Skills needed will: Change Stay the same

Size of workforce will: Change Stay the same

Define specific capabilities that are not available today but will be needed in the future.

Define specific capabilities and jobs that are required today but will not be necessary in the future.

3. If new skills or an expanded workforce will be required in coming years, do we have a clear idea of where those workers will come from? Yes No

What steps will we need to take to locate and attract the workers we will require?

4. How many employees will be retiring in the coming five years? _____

How many employees will be retiring in the coming ten years? _____

Is there a plan in place to replace them? Yes No

5. Do we have a succession plan for all key employees/positions? Yes No

6. If key individuals left today, what challenges would we face in replacing them? _____

a) Level of difficulty anticipated in finding right mix of skills and experience _____

b) Estimated time involved in finding replacements _____

c) Estimated cost of finding replacements _____

d) Estimated time in training replacements _____

e) Estimated cost of training replacements _____

Steps we must take to begin/continue succession planning:

7. Do we have any retention strategies in place to keep experienced and valued workers?

Yes No

What actions can be taken to keep our high quality, experienced workers for as long as possible?

8. What are the opportunities and barriers facing workers who may wish to stay after their official retirement?

Must they retire and be hired back? Yes No

Will their pension benefits be negatively affected? Yes No

Will they lose seniority or benefits? Yes No

What changes can we make to make it easier for workers to stay past 65?

Will those changes allow us to differentiate between employees we wish to retain and those we do not wish to retain? If not, are there actions we can take to allow differentiation?

9. Are there skills or jobs that will no longer be needed in the future? Yes No

Do we have a plan and cost assessment in place for making those changes? Yes No

What actions can we begin to take today to prepare those individuals or the company for the time when those skills are not needed?

10. What will be our greatest challenges in retaining and recruiting the workers we need?

11. Do we have an organizational culture that makes our company an employer of choice? Yes No

What changes can we make to strengthen our culture to make our company an employer of choice?

12. Are we ready to begin to build a plan to meet our future workforce needs? Yes No

If not, what information do we need, or what actions need to be taken to prepare ourselves?

13. What steps should we take to communicate our plans to key stakeholders – employees, unions, etc?

14. What outside resources are available for assistance in workforce planning?

Appendix C - Employee Questionnaire for Workforce Planning

The following questionnaire may be used to seek employee input into the workforce planning process and to better understand employee perceptions of priorities in their assigned duties.

1. What are the five most important tasks/duties you perform, in order of importance? Beside each, list the percentage of your time that you generally spend on each.

1. _____ %
2. _____ %
3. _____ %
4. _____ %
5. _____ %

2. Do you think that the time you spend on each of these duties reflects their overall importance?
Yes No Please explain: _____

3. What tasks/duties do you perform that you think may be unnecessary or better performed by another worker? _____

4. Are there tasks/duties performed by others that you think might be better managed by you?
Yes No What are they? _____

5. Are there new tasks or duties that you think would be best assigned to you? Yes No
How much time do you think it would take you to perform these duties? _____

6. Have any of these tasks/duties increased or decreased greatly in the last 2 years? Yes No
Please explain: _____



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