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EDMONTON

The Benefits of Age:

**An Annotated Bibliography of Strategies that Support Improved
Labour Market Participation for Older Workers**

This document was prepared by the Edmonton Chamber of Voluntary Organization on behalf of Edmonton Seniors Coordinating Council and City of Edmonton as part of A Vision for the Age-Friendly Edmonton Action Plan. The Action Plan provides strategic direction in 9 key areas and through 18 goals that will meet the needs of and improve the quality of life for seniors in Edmonton.

2013

Introduction

In the spring of 2011, Vision for An Age Friendly Edmonton: Action Plan was published. This five year plan provides strategic direction to meet the needs of seniors in Edmonton. Containing nine key strategic areas with 18 goals and associated actions, the plan aims to improve the lives of Edmonton's seniors. The key strategic areas are:

- Community Support Services
- Health Service, Communication and Information
- Social and Recreational Participation
- Transportation
- Respect and Social Inclusion
- Civic Participation, Volunteerism and Employment
- Housing
- Outdoor Spaces and Buildings

Working groups were established to focus on each of the key areas. In April 2013, the Civic Participation, Volunteerism and Employment Working Group explored goals and prioritized actions achievable within 6 months. One of the priority actions identified was conducting research and identifying and sharing best practices with regards to seniors' participation in the workforce.

The Edmonton Chamber of Voluntary Organizations (ECVO) is a nonprofit organization that provides capacity support to nonprofits. ECVO was one of the facilitators in the development of A Workforce Strategy for Alberta's Nonprofit and Voluntary Sector, and co-led Alberta's Workforce Council, a collaborative effort to support nonprofit workforce development.

As part of the Civic Participation, Volunteerism and Employment Working Group, ECVO has developed this annotated bibliography containing research reports and workforce strategies documenting successful approaches to improve participation of seniors in the labour market.

Methodology

This annotated bibliography includes Canadian workforce strategies, research reports and best practice reports published between 2006 and 2013. This period was selected because it coincides with the release of Alberta's Building and Educating Tomorrow's Workforce and several Alberta Industry Workforce Strategies. In addition, several significant research reports released by the National Seniors Council and the Canadian Council on Aging provided improved data on the state of seniors in relation to Canada's labour market around this time.

While this report focuses on Canadian sources, it should be noted that among English speaking countries, The United States, Australia and New Zealand have developed significant bodies of work on attracting, retaining and engaging the mature workforce.

The reports in this document were gathered through an electronic scan of reports published on the internet. This document, while representative, in no way represents a comprehensive review of all documentation related to older workers and workforce strategies and best or promising practices for improving workforce participation of older workers.

This bibliography is organized into three parts. Part I identifies Provincial Workforce Strategies, and highlights Alberta Strategies, Part II explores Industry Workforce Strategies. Part III focuses on Reports and Best and or Promising Practice documents. Documents listed in the bibliography include research

reports and documents providing supports and strategies to assist employers to attract and retain mature workers.

This bibliography intentionally excludes articles from blogs, newspapers, newsletters or academic journals. It was found that these documents either utilized information or facts from the primary research documents, or failed to cite any sources for their information. In the case of academic journals, they were omitted due to the fact that they are often inaccessible to users outside of the academy and as a result may not support the readers of this document.

PART I

Provincial Workforce Strategies

Most provinces have current workforce strategies or labour market development plans that include strategies aimed at improving workforce attachment for mature workers. Alberta, Nova Scotia, Nunavut Saskatchewan and the Yukon Territory, all include strategies specific to older workers, while other provinces would include mature workers as a target audience in strategies aimed at “under-represented” groups in the workforce.

Government of Nova Scotia, Department of Labour and Advanced Education. (2011) *Nova Scotia’s Workforce Strategy*.

<http://careers.novascotia.ca/sites/default/files/WorkforceStrategy.pdf>

Government of Nunavut, (2010) *Labour Market Agreement, Annex 1*.

http://www.gov.nu.ca/sites/default/files/nunavut_lma_-_annex_1-multi_year_plan_final.pdf

Government of Yukon Territories, Department of Education. (2010) *Recruitment and Employee Retention Strategies*.

<http://www.labourmarketframeworkyukon.com/system/PDF/RR%20strategies.pdf>

Government of Saskatchewan, Saskatchewan Labour Market Commission. (2009) *Right People Right Place Right Time: Saskatchewan’s Labour Market Strategy*.

<http://ae.gov.sk.ca/sk-labour-market-strategy>

Government of Alberta, Ministry of Human Resources and Employment. (2006) *Building and Educating Tomorrow’s Workforce: Alberta’s 10 Year Plan*.

http://eae.alberta.ca/documents/WIA/WIA-BETW_strategy.pdf

Alberta

Alberta has taken the lead in developing strategies to improve labour market attachment for mature workers. Within the Building and Educating Tomorrow's Workforce initiative (BETW), the Province of Alberta has published the only provincial workforce strategy for mature workers in Canada to date, *'Engaging the Mature Worker: An Action Plan for Alberta'*.

Government of Alberta, Department of Innovation and Advanced Education. (2011) *Engaging the Mature Worker – An Action plan for Alberta.*

<http://eae.alberta.ca/documents/RRM/RRM-BI-mature-workers.pdf>

Engaging the Mature Worker: An Action Plan for Alberta was released in 2011 in response to a need identified in the Province's workforce development strategy Building and Educating Tomorrow's Workforce. The Strategy called for the development of actions to support the retention of mature workers, aged 55 and older in the workforce.

The Action Plan identifies four goals aimed at increasing the labour force participation of Alberta's mature workers and improving the supply of knowledgeable, skilled workers.

- Engage employers;
- Support mature workers;
- Promote active aging; and
- Promote a supportive policy environment.

Identifying responsibility for implementation with Government Departments and external stakeholders, the Plan identifies performance indicators and related targets to support monitoring of short and long-term progress.

PART II

Industry Workforce Strategies

As part of the BETW initiative, the Government of Alberta supported eight industry groups to develop industry specific workforce strategies. The Strategies identified priority action areas under four themes: Inform, Attract, Develop and Retain. All of the industry strategies make reference to supports for engaging mature workers as a priority group and many strategies include priority actions specific to mature workers.

Government of Alberta, Department of Innovation and Advanced Education. (2009) *A Workforce Strategy for Alberta's Supply Chain Logistics Industry.*

http://eae.alberta.ca/documents/WIA/WIA-BETW_supply_chain_strategy.pdf

This Supply Chain and Logistics Industry Strategy includes actions aimed at developing a re-training program to assist late-career, mature workers to shift into a career within the supply chain logistics sector.

Government of Alberta, Department of Innovation and Advanced Education. (2008) *A Workforce Strategy for Alberta's Forest Industry.*

http://eae.alberta.ca/documents/WIA/WIA-BETW_forestindustry_strategy.pdf

Within the Develop theme of the Forest Industry Strategy, priority was placed on the development of a strategy aimed at strengthening human resource management so that groups, including mature workers, are effectively integrating into workplaces.

Government of Alberta, Department of Innovation and Advanced Education. (2008) *A Workforce Strategy for Alberta's Nonprofit/Voluntary Sector.*

http://eae.alberta.ca/documents/WIA/WIA-BETW_nonprofit_strategy.pdf

The Nonprofit/Voluntary Sector Strategy incorporates priority actions under the Retain theme to enhance the attractiveness of working in Alberta's non-profit sector so that mature workers, among other groups, remain engaged in the sector.

Government of Alberta, Department of Innovation and Advanced Education. (2007) *A Workforce Strategy for Alberta's Construction Industry.*

http://eae.alberta.ca/documents/WIA/WIA-BETW_construction_strategy.pdf

The Retain theme in the Construction Industry Strategy includes priority actions that result in increased attractiveness of the construction industry as a workplace for mature workers. In addition the Strategy calls for actions that will encourage employers to adopt progressive employment practices that improve the retention of mature workers in the industry.

Government of Alberta, Department of Innovation and Advanced Education. (2007) *A Workforce Strategy for Alberta's Energy Sector.*

http://eae.alberta.ca/documents/WIA/WIA-BETW_energy_strategy.pdf

The Energy Sector Strategy includes the review of incentives/disincentives to encourage mature workers to remain engaged in Alberta's energy sector as a priority action.

Government of Alberta, Department of Innovation and Advanced Education. (2007) *A Workforce Strategy for Alberta's Manufacturing Industry.*

http://eae.alberta.ca/documents/WIA/WIA-BETW_manufacturing_strategy.pdf

Priority actions within the Retain theme include providing training on effective practices for integrating groups, including mature workers, in manufacturing workplaces.

Government of Alberta, Department of Innovation and Advanced Education. (2007) *A Workforce Strategy for Alberta's Tourism and Hospitality Industry.*

http://eae.alberta.ca/documents/WIA/WIA-BETW_tourism_strategy.pdf

Both the Develop and Retain themes in The Tourism and Hospitality Industry Strategy include priority actions aimed at mature workers. These include actions to improve practices for mature workers integrating into the workplace, initiatives to encourage the retention of mature workers in the industry and calls for lobbying for the removal of disincentives in pension and income tax provisions that discourage mature workers remaining in the workforce.

Government of Alberta, Department of Innovation and Advanced Education. (2006) *Building and Educating Tomorrow's Workforce – A Sub-Strategy for Alberta's Retail Industry.*

http://eae.alberta.ca/documents/WIA/WIA-BETW_retail_substrategy.pdf

The Retail Industry Sub-Strategy places priority on strengthening practices that support improved integration of mature workers into workplaces. In addition, the Strategy incorporates actions aimed at developing cultural diversity to improve the retention of under-represented groups in the industry, as well as proposing changes to pension and income tax provisions that discourage individuals from continuing to work after retirement.

PART III

Promising Practices

Promising practices are techniques or methodologies that, through experience and research, have proven to reliably lead to a desired result. A commitment to using the best practices in any field is a commitment to using all the knowledge and technology at one's disposal to ensure success. The practices identified in the references below have been captured through qualitative and quantitative research and represent some of the best solutions to improving labour market participation for mature workers.

CARP Canada. (2013) *CARP's New Vision for Engaging Older Workers.*

<http://www.carp.ca/wp-content/uploads/2013/12/Older-Worker-Paper-Dec-2013.pdf>

This white paper provides a vision and recommendations for engaging older Canadians in the workforce. Data shows that Canadians are staying in the workforce longer and CARP argues that as a result of significant social and economic factors, older workers want and need work, but barriers make it more difficult for older workers to keep their jobs or find re-employment once they leave the workforce. In addition, it is known that older workers tend to stay unemployed longer once they are out of the workforce.

CARP calls on the government and employers to work together to create an employment landscape that recognizes the importance and value of older workers by removing barriers and providing job opportunities, and recommends the following activities:

- All levels of government need to work together to remove barriers to continued employment
- Create additional supports that help unemployed older Canadians through prolonged job search
- Create job opportunities and promote the value of older workers.

Government of Canada, Ministry of Health and Ministry of Human Resources and Skills Development, The National Seniors Council. (2013) *Older Workers At Risk of Withdrawing from the Labour Force or Becoming Unemployed: Employers' views on how to retain and attract older workers.*

http://www.seniorscouncil.gc.ca/eng/research_publications/older_workers/older_workers.pdf

The National Seniors Council (NSC) developed the findings in this report through consultation with employers and selected leaders of employer networks in person, via teleconference or through an online consultation. The consultations led to the development of a series of recommendations organized under the following broad themes:

- Raising awareness of and recognizing the value and benefits of encouraging the active participation of older workers
- Building on the successes of federal programs and initiatives
- Engaging employers in planning for the aging workforce.

Federal/Provincial/Territorial Ministers Responsible for Seniors, Human Resource Development Canada. (2012) *Age Friendly Workplace: Promoting Older Worker Participation.*

http://www.seniors.gov.on.ca/en/resources/fpt/AFW%20Booklet_EN.pdf

This guide produced by The Forum of Federal/Provincial/Territorial Ministers Responsible for Seniors provides employers with strategies for engaging older workers.

Providing a case for employing older workers, the guide outlines the benefits of employing older workers. It briefly explores successful recruitment practices for attracting and retaining older workers including: where and how to advertise, effective advertising content, screening processes and interviewing techniques.

In addition, a series of tips assists and case studies from organizations across Canada that are successfully attracting and retaining older workers in their organizations are provided to assist employers to get started. Case Studies include: The Bethany Care Society, The Catholic Children's Aid Society of Toronto, Seven Oaks General Hospital, Merck Frosst Canada Limited and AltaGas Limited.

Federal/Provincial/Territorial Ministers Responsible for Seniors, Human Resource Development Canada. (2012) *Age Friendly Workplace: Promoting Older Worker Participation Checklist*. http://www.seniors.gov.on.ca/en/resources/fpt/AFW%20Checklist_EN.pdf

This tool is associated with the *Age Friendly Workplace: Promoting Older Worker Participation* published by Federal/Provincial/Territorial Ministers Responsible for Seniors and Human Resource Development Canada. It provides employers with a series of four checklists to assist them to assess the attractiveness of their workplace to older workers. The checklists identify human resource planning, recruitment, training and development and retention activities, behaviours and projects that support age-friendly workplaces and provides an opportunity for the employer to rate how well they are performing in these areas.

Public Policy Forum. (2011) *Canada's Aging Workforce: A National Conference on Maximizing Employment Opportunities for Mature Workers - Summary Report*. http://ppforum.com/sites/default/files/canadas_aging_workforce_eng_report.pdf

This report summarizes the key themes discussed at Canada's Aging Work-force: A National Conference on Maximizing Employment Opportunities for Mature Workers conference hosted by Public Policy Forum on behalf of Human Resource & Skills Development Canada in 2010. The report synthesises the presentations and dialogue from the conference and encapsulates the thinking generated about approaches and recommendations for strengthening employability and increasing engagement among mature workers.

The key themes discussed at the conference and shared in the report include re-employment, retention and recruitment. In addition the report highlights existing initiatives that support mature workers. Finally the report highlights areas for further consideration and identifies key questions for future thought.

Construction Sector Council. (2011) *Manage to Last: Older Worker's Labour Market Inclusion and Extension*. http://www.buildforce.ca/en/system/files/products/manage_to_last_0.pdf

This report provides an analytical survey of statistics related to older workers and a literature review in order to determine:

- Potential areas for the employment and retention of older workers in the Construction Sector
- Barriers to the employment of older workers
- Best practices related to older workers employment and retention.

Sections 1 and 2 of the report provide a background to the project and an overview of methodology. In Section 3 is an overview of the Canadian labour market and provides comparisons to international trends and analysis of indicators specific to older workers in the labour force. Section 4 uses data to identify trades with the greatest potential for attracting and retaining older workers.

Section 5 focuses on analysing barriers to employment for older workers from a national and international perspective, and, whenever possible, more specifically to the construction industry. Best practices are covered in Sections 6 and 7, analysing both incentives to make workplaces more attractive to older workers as well as best practices for hiring and retaining older workers.

Construction Sector Council. (2011) *Strategies and Best Practices for The Recruitment, Retention and Employment of Older Workers in The Construction Industry.*
http://www.buildforce.ca/en/system/files/products/older_workers_strategies_and_best_practices_0.pdf

This workbook was developed by the Canadian Construction Sector Council in 2011 to support organizations in their efforts to recruit, retain and support older members of their workforce. The Workbook is organized into four main sections: Recruitment, Retention, Transition To Retirement Support and Other Strategies and Best Practices. Each section includes a list of best practices to support specific strategies or practices. Also included are sample policies, examples of programs and initiatives as well as useful tips and suggestions.

The Alliance of Sector Councils. (2011) *Older Workers as Important Labour Force Participants: A Discussion Paper.*
http://www.nald.ca/library/learning/tasc/older_workers/older_workers.pdf

This discussion paper summarizes older workers and labour force planning issues and the benefits and opportunities related to better utilizing older workers in Canada. The paper argues that attraction and retention of older workers should be a labour force development priority.

To support employers, the authors include practical recommendations for retaining older workers through accommodation, training, and succession planning. For effectively recruiting older workers, the report provides recommendations including targeted marketing, training and accommodation.

The report also identifies programs and services developed by Industry Sector Councils that support the employment and development of older workers. The Sector Councils include:

- Canadian Tourism Human Resource Council
- The Canadian Auto Repair and Service Council
- HR Council for the Nonprofit Sector

- Construction Sector Council
- Apparel Human Resource Council

Government of Canada, Ministry of Health and Ministry of Human Resources and Skills Development, The National Seniors Council. (2011) *Report on the Labour Force Participation of Seniors and Near Seniors, and Intergenerational Relations.*

http://www.seniorscouncil.gc.ca/eng/research_publications/labour_force/page07.shtml

This report summarizes consultations hosted by the National Seniors Council from October 2010 to March 2011. The objective of the report is to identify the key challenges and barriers affecting labour force participation of seniors and near seniors. The report explores positive intergenerational relations, and suggests options for federal action that may serve to break down barriers and support the well-being of seniors and all Canadians.

The consultations resulted in several recommendations for action by the Federal Government.

- Develop and implement a comprehensive workforce aging strategy.
- Develop supports for senior volunteers.
- Develop policy solutions to support the provision of informal care.
- As the Government moves forward in assessing and addressing the impact of an aging population, analysis of intergenerational challenges and opportunities should be an integral part of this work.
- Integrate the importance of intergenerational relationships into the celebration of both National Seniors Day and National Child Day.
- Place more emphasis on supporting intergenerational community projects through the New Horizons for Seniors Program.
- Work collaboratively with all levels of government, stakeholders and relevant partners to develop integrated, coordinated and comprehensive policy that supports all Canadians in response to the challenges of population aging.

Toronto Training Board. (2010) *Songs of Experience: Mature Workers and Labour Market Transitions.*

<http://www.workforceinnovation.ca/sites/default/files/SongsofExperience.pdf>

This report shares the results of interviews with eight mature workers and six stakeholders representing employers, academics and advocacy groups. The interviews explored their work history of mature workers at different stages of leaving or re-entering the labour force. These individuals were asked to share their thoughts on retirement and the strategies they are using to transition into and out of employment. Interviews with employers and other stakeholders identified the strategies that employers use to retain the knowledge, skills and abilities of mature workers.

The results of the interviews were synthesized into Best and/or Promising Practices Related to Mature Workers. These include:

- Ensuring accessible training for re-entry to the workforce – Examples of approaches that support access to training for mature workers

- Offering flexible work arrangements as an attraction strategy– With examples from Direct Energy, Catholic Children’s Aid Society of Toronto and Ontario Public Service
- Investing in accommodations to support performance
- Using Innovative strategies to recruit mature workers - With Examples from Home Depot, Avis Rent a Car, Catholic Children’s Aid Society of Toronto, Direct Energy, Toronto Auto Auctions
- Improving attraction and retention by offering phased retirement and partial retirement options
- Integrating informal experience and knowledge into the job

Government of Canada, Senate of Canada, Special Senate Committee on Aging. (2009) *Canada's Aging Population: Seizing the Opportunity.*

<http://www.parl.gc.ca/Content/SEN/Committee/402/agei/rep/AgingFinalReport-e.pdf>

This report is the final report in a series of three issued by the Special Senate Committee on Aging. It provides a comprehensive vision and broad recommendations for government, organizations and individuals to embrace the challenges of an aging population.

Covering a variety of issues facing seniors, the report addresses employment in the Countering Ageism chapter in the section called Competency at Work. The report highlights that while all provinces have eliminated mandatory retirement, federally regulated employees fall under the purview of the Canadian Human Rights Act, which excludes those who have “reached the normal age of retirement” from protection against discrimination in the workplace. As a result, federally regulated employees are the only employees in Canada not protected from mandatory retirement.

The report explicitly states that the authors believe Canadians should have choice about when to retire based on ability and not on age and recommends that “the provisions of the Canadian Human Rights Act concerning mandatory retirement be amended to bring federal legislation in line with other human rights legislation in Canada”.

Training and Adjustment Board, Waterloo Wellington. (2009) *Older Worker Retention Strategies – A Literature Review.*

<http://workforceplanningboard.com/Files/English/Older%20worker%20retention%20strategies.pdf>

To address growing skills shortages and to improve the retention and/or transfer of knowledge to new or younger employees, The Waterloo Wellington Training and Adjustment Board commissioned a literature review aimed at identifying strategies to support and retain older workers in the workplace. Thirteen strategies are identified. For each of the strategies, a brief description and some details regarding approaches, impacts, and or challenges associated with the strategy are included. Strategies include:

- Job Redesign
- Flex Time
- Job Sharing
- Training
- Customized Benefits
- New Positions
- Pre-retirement Leave and Vacations
- Shift Selection and Special Shift Schedules

- Dual Worksite Programs
- Telework
- Work Reduction
- Contract Work
- Changing Legislation.

Government of Canada, Human Resources and Social Development Canada, Expert Panel on Older Workers. (2009) *Supporting and Engaging Older Workers in the New Economy*. http://publications.gc.ca/collections/collection_2010/rhdcc-hrsdc/HS4-105-2008-eng.pdf

This report is based on a series of national consultations conducted by Expert Panel on Older Workers between 2007 and 2009. The report examined the position of older workers within the broad labour market context, the impacts of population aging on Canada's economy and labour force, the barriers to older workers' participation in the labour market and the circumstances of displaced older workers, and their labour market prospects.

Part I provides the context of older workers in the labour market and analyses their experiences and the obstacles they face. Part II summarizes the findings of the consultation process with provincial and territorial governments, stakeholders in the broader public, and academic researchers. Part III, presents recommendations from the Expert Panel which deal with enhancing the labour market prospects of older workers. Part IV focuses on recommendations for how best to support older workers' adjustment in the labour market.

The report calls on the government and employers to work together to create an employment landscape that recognizes the importance and value of older workers by removing barriers and providing job opportunities, and recommends the following activities:

- All levels of government need to work together to remove barriers to continued employment
- Create additional supports that help unemployed older Canadians through prolonged job search
- Create job opportunities and promote the value of older workers.

Government of British Columbia, Ministry of Economic Development. (2008) *The BC Employer's Toolkit: A Resource for British Columbia Businesses, Booklet 2: It's About Ability – How to Attract, Retain, and Engage Mature Workers*. http://www.workbc.ca/WorkBC/media/WorkBC/Documents/Docs/toolKit_Book2.pdf

This toolkit was developed as resources for employers in anticipation of coming demographic shifts associated with the aging workforce and the impact on business due to the potential loss of expertise and skills. The authors refer to this situation as "the labour storm", and provide employers with strategies and tips to assist them to stay ahead of the storm by creating workplace environments that will encourage mature workers to remain engaged on mutually beneficial terms.

The toolkit identifies the need for employers to understand generational differences in the workplace and to use this knowledge to create roles, benefits and incentives that will attract mature workers. It suggests that employers who are effective at managing and communicating flexible work and retirement options will be better able to attract and retain existing and prospective mature workers. The

toolkit includes a short case-study about flexible options from the mature worker and employer perspectives.

The toolkit also points to the need for intentional workforce planning aimed at mature workers. This planning includes understanding the environment, having a future vision and an action plan to generate tangible actions that engage, retain and attract mature workers. Strategies are provided for the improved attraction and engagement of mature workers.

Watt, D., Haimowitz, J., Fennessy, B., Synowski, E., Macdonald, A., Thomson, M., The Conference Board of Canada. (2007) *Ontario's Looming Labour Shortage Challenges Projections of Labour Shortages in Ontario, and Possible Strategies to Engage Unused and Underutilized Human Resources.*

http://www.workforcecoalition.ca/downloads/conference_board_report.pdf

In this Conference Board of Canada report, mature workers are identified as one of several key underrepresented populations that Ontario can tap into to build its human resources capacity. The report offers analysis of the challenges facing mature workers and employers and offers some strategies to increase labour force participation of seniors.

Identifying the contribution of mature workers as essential to the nation's productivity and competitiveness, the authors suggest that Ontario should draw on the experiences and actions of other governments and jurisdictions to develop and implement proactive labour-market programs focused on increasing the supply of older workers. The report examines the effectiveness of:

- Balancing income support and work incentives - Finding the right balance of income support and work incentive policies to help increase the participation rate of mature workers
- Improving working conditions to meet the needs of older workers - Offer management guidelines and various forms of incentive-based funding to assist employers to improve workplace accessibility
- Investing in training to fill shortages - Replicating programs modeled on the federal Targeted Initiative for Older Workers initiative
- Harnessing the existing skills of seniors - Build not-for-profit sector specific programs to leverage the New Horizons for Seniors initiative.