



The Muttart Fellowships



**Aging in the Workplace**

Bob Sims

Each item in The Muttart Fellowship Products Series carries “the look” designed for the program. The concept incorporating pebbles and water fits with the Zen-like qualities of the visual identity of the Fellowship Program.

Each front-cover pebble is different—representing the uniqueness of each fellow and what s/he has to offer. Applicants are like pebbles among pebbles. After each is refreshed and renewed through the Fellowship year, s/he has an impact on the nonprofit charitable sector like the rings the pebble creates on a pond of water.

The varied use of this design recognizes the individuality of the Fellows while also creating a unified look to the Muttart Fellowship Products Series.

The Muttart Fellowship Program—unique in Canada—was created in 1996. A project of The Muttart Foundation, a private foundation based in Edmonton, Alberta, the program is designed to:

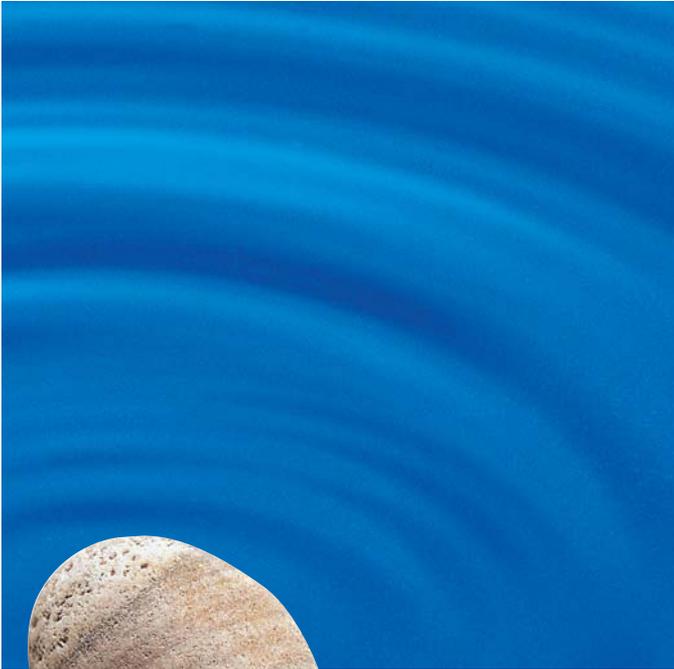
- develop research and other materials that will benefit the charitable sector in Canada.
- provide senior managers within the social-services sector with an opportunity for a sabbatical year—a chance to recharge and renew themselves.

Up to five fellowships are awarded each year to people working in senior-management positions in social-service charities within the Foundation's funding area—Alberta, Saskatchewan, Northwest Territories and Yukon.

During the Fellowship year, the Fellow leaves his or her agency to work on the chosen project. The Foundation makes a grant equal to the salary and benefit costs for the Fellow's position, and provides a budget for expenses related to the project. At the end of the Fellowship year, the Fellow returns to his or her agency for at least a year.

For more information about the project, please contact:

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## **Aging in the Workplace**

Bob Sims

2003



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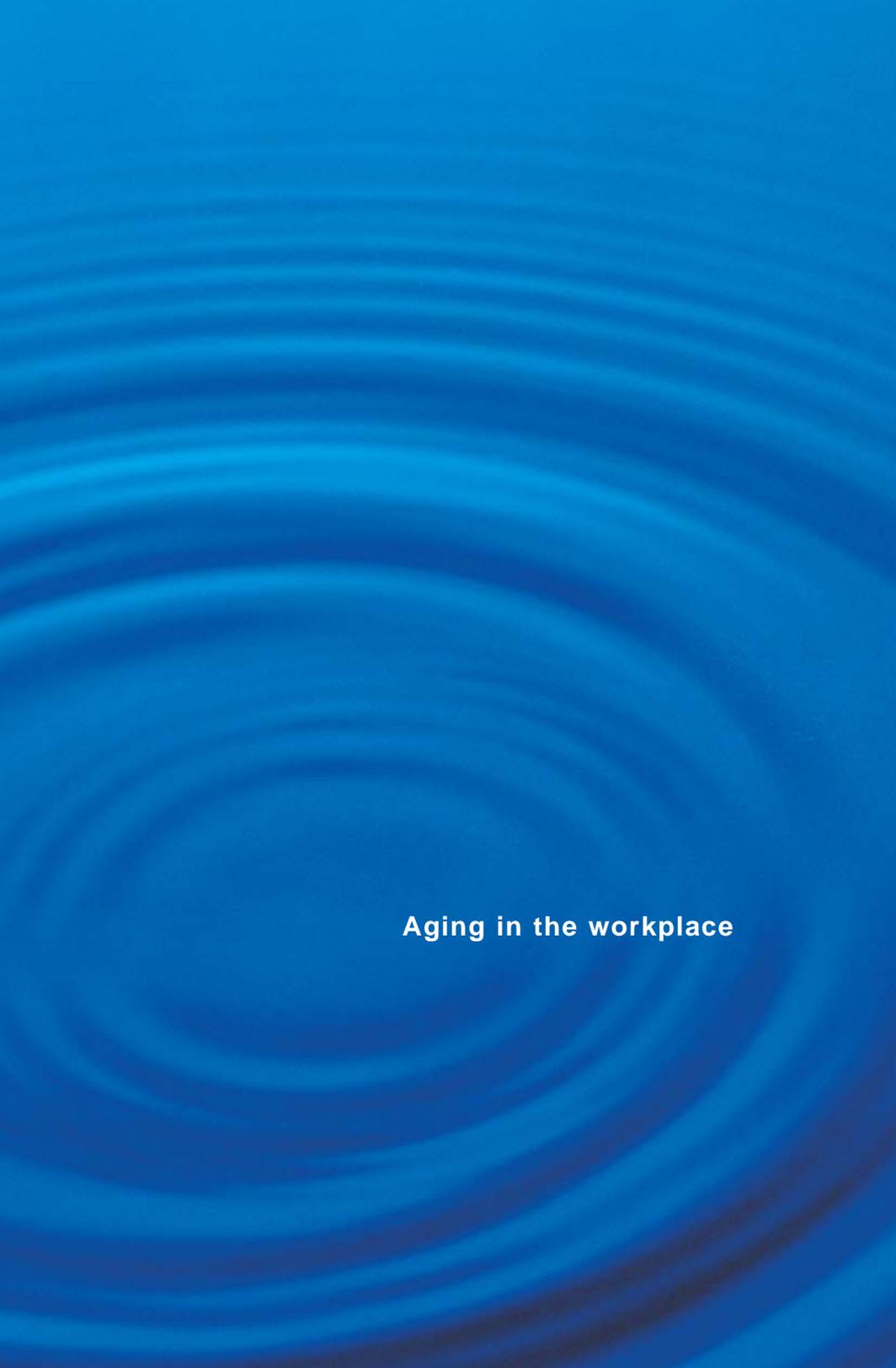
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This work was originally presented as a PowerPoint® presentation.

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**Aging in the workplace**

# Personal Events

- **Mother**
- **Father in Law**
- **Close Friend**
- **Reaction**

---

Within a four month period in 1999, I experienced the deaths of three people very close to me, my mother and father-in-law through cancer, and a close friend by accident.

# Reaction

- **Mortality**
  - **Unique experiences**
  - **Everyone different**
  - **Shared experiences**
- 

These events, as you would expect, caused me to wonder about my own mortality and to seriously think about these experiences, and the impact they had on my family.

While these sorts of experiences are unique and different for each individual, I found that there are certain commonalities within them.

As I shared my experiences with friends, family, co-workers and colleagues, a common thread began to appear, a thread that concerned the difficulties of maintaining a “work” life and a home or personal life.

At the same time, it was obvious that for the most part, these kinds of issues became more prevalent as individuals became older.

# Reality

- **Need to move on**
- **Need to integrate work and home**

---

As time went on, I felt that I needed to move on.

As a result of these events, I continued to think about the need for people to be able to integrate the work and home life.

# Muttart Fellowship

- **Opportunity to make use of experience**
- **Examine Work-Life Balance issues**
- **Emphasis on what happens as staff age in Not-For-Profits**

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With these issues in mind, I applied to the Muttart Fellowship Program, hoping for an opportunity to examine these work-life balance issues, especially as they may apply to work in the not for profit sector.

# Opportunity

- **To think**
- **To study**
- **To interpret**
- **Relax, regroup, and rejuvenate**

---

With managing a not-for-profit on a day to day basis often being about “putting out fires”, I looked forward to the opportunity to think, to study, to interpret, and to rest.

# Thank you

- **To the Muttart Foundation**
- **To the interviewees**
- **To those who provided resources**
- **To my family**

---

I want to express my sincere appreciation to the Muttart Foundation for the experience I have had, and for its foresight in creating the opportunity that myself and others have shared.

I also want to thank those who I interviewed and received information from, in London, Manchester, Harrogate and Bath in England, and in Toronto, Owen Sound, Saskatoon and Regina here in Canada. Appreciation also to the terrific response I received from over eighty United Way agencies across Canada.

A special thanks go to my family, who provided so much support and encouragement.

# This Presentation

- **Provides background for discussion**
  - **Refers to strategy**
  - **Different strokes for different folks**
  - **Like it or not, these issues are upon us or just around the corner**
- 

This presentation is in no way designed to provide all the answers to a perplexing set of issues.

It is rather an opportunity to promote discussion within the not for profit sector regarding the future, the issues of aging in the workplace, and maintaining a health work-life balance.

It attempts to build a background of an understanding of demographics and how they can effect the workplace.

There is discussion of some of the strategies that people have used to address these issues, keeping in mind that each situation is unique, and that success is determined by any number of variables.

The issues at hand cannot be avoided

**Demographics**

# Changing Demographics

- **This presentation is based on changing demographics**
  - **A way of looking at life events**
  - **A way of predicting future events**
  - **Emphasis on age and gender**
- 

The area of demographics is a fascinating one.

Over time, demographics are a fluid dynamic which shape our lives in so many ways. Demographics are a long term dynamic which have more power to shape us than us to shape them.

Demographics give us another way to view and understand our world, and a means by which to predict some future situations.

While demographics include more than just age and gender, those two variables are the emphasis of this presentation.

# Baby Boomers

- The most common demographic reference we hear
-

# Getting our Bearings

- **Boomers**
  - **Busters**
  - **Echoes**
  - **Gen Xers**
-

# Boomers

- **Unusual 20 year cohort**
- **1947 – 1966**
- **Boom biggest in Canada**

**Started earlier and finished later than USA**

**Troops home earlier**

**Used pill later**

---

Most statistical age cohorts are done in ten year groupings. The baby boom is a twenty year cohort as it encompasses the years of major population growth.

The Boom was more pronounced in Canada than anywhere else.

In USA, troops came home later from WWII, and in the sixties, American women began using the pill earlier than Canadian women, thus the boom in America is shorter.

# Gen Xers

- **Not a separate group**
  - **Tail end of Boomers – early 1960's**
  - **Media confuses**
  - **A specific age group, not 30 somethings**
- 

Much has been made of the Generation Xers, and unfortunately, the media has contributed to confusion as to who exactly is a GenXer.

The term comes from the Douglas Coupland novel.  
Generation X

Media would often have us believe that a GenXer is the same as a “thirty-something”, and that as people age, they pass through the GenX phase.

Not so. For demographic purposes, the true Generation X refers to people born in the baby boom years, but at the very end of the boom, in the early sixties.

# Busters

- Late 60s to early 80s
- So called because of decline or “bust” in population growth

---

Those people born after the population began to decrease are generally referred to as the baby busters.

# Echoes

- **Children of Boomers**
  - **The next big bubble**
  - **Not as big a group as boomers**
-

# Demographic Impact

- **Not always understood**
  - **Retail**
  - **Employment**
  - **Education**
  - **Health Care**
  - **Real Estate**
  - **Culture**
- 

Demographics impact our lives in so many ways.

For those with an interest in demographics, an excellent resource is David Foote's Boom, Bust, and Echo.

# Health Care

- **Who are the likely consumers?**
- **Different strategies for different age groups**
- **Geriatrics vs Obstetrics**

---

This is but a small example of how the demographics of “age and gender shape our health care. An understanding of demographics provides a solid benchmark for strategic planning.

# Retail

- **Success linked to:**
    - Present services**
    - Future services**
  - **Shoe store**
    - Current emphasis – cross trainers**
    - Future emphasis – basic beige “walkers”**
- 

Changing demographics often mean changing markets.  
The retailer who is in business for the long haul must understand this.

# Real Estate

- **Mall development emphasis:**
    - Current & past – gyms and racquet courts**
    - Future – wide hallways for mall walkers**
- 

Do we need more apartments or houses?

How big (or small) should dwellings be?

Is proximity to schools as big an issue as it was twenty years ago?

Who will I sell my house to if the population is declining?

Will apartments have elevators.

These are all questions which can be answered to some degree by demographics.

# Baby Boom Impact

- **Has been interesting to observe**
- **Impacts on everything from defence strategy to paint colours**

---

While other age cohorts have had and will have their impact, the impact of the baby boom, perhaps because of its sheer size, and the fact that many of us are part of it, is fascinating to observe.

# Baby Boom Impact

- Example from David Foote's *Boom, Bust, and Echo*
- Margaret Atwood's first novel – 1969

*9 point type*

Margaret Atwood's 1996 novel

*12 point type*

---

The impacts we experience are often very subtle, as this example illustrates.

# Bringing it Together

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We need to ask ourselves how all this effects us collectively and individually, especially our hopes to bring some balance to our personal and work lives.

# Not For Profits In 2002

- **The Hypothesis Of This Presentation Is That Not-For-Profits Have A High Population Of Baby Boomers, And That This Will Have Significant Impact Over The Next 20 Years**

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Observation and involvement over the last twenty years indicated that not for profit health and social service agencies and organizations were mainly staffed by baby boomers.

# Mini Poll

- **Random sample of United Way agencies across Canada**
  - **28 agencies employing 182 people**
  - **Includes shelters, counselling services, those assisting immigrants, etc.**
  - **This Is Not A Scientific Poll!**
- 

This presentation is not the result of a highly academic process and this poll is not highly scientific.

This poll was conducted by email, through randomly selected United Way agencies across Canada. Participants were asked three questions:

How many paid staff work in your workplace?

What is the gender ratio?

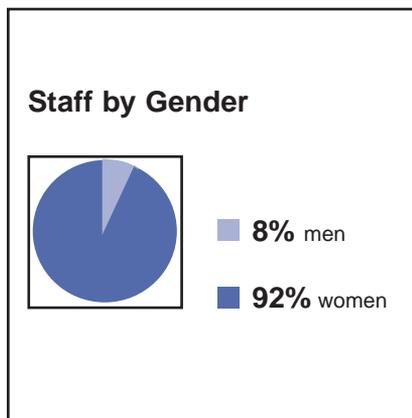
What is the average age of your staff?

# Staff by Gender

- Considerable over- representation by women

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I'm sure that most people familiar with these kinds of agencies would have anticipated this result.

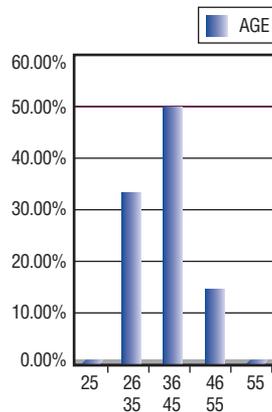


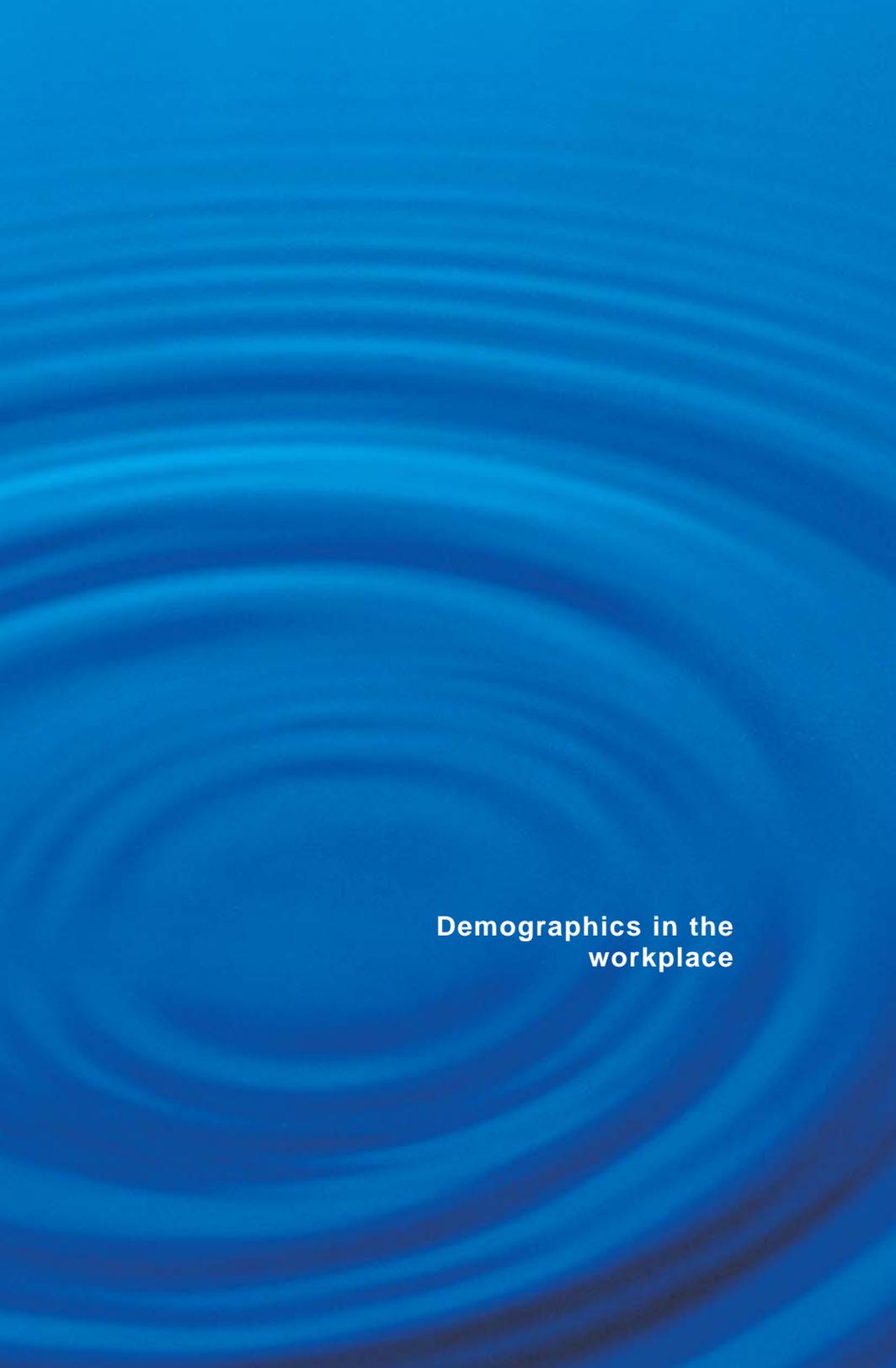
# Staff by Age

- If the Baby Boom ages are 36-55, we see that the majority of staff are boomers

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If the baby boom ages are 36-55, then we see that approximately two thirds of the staff in these workplaces are boomers.



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## Demographics in the workplace

# Mini Poll

- **Average staff is female**
- **Average staff is a Baby Boomer**

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We know from our Mini Poll that a very rough profile of workers in these workplaces is female and between 36 and 55.

# Canadian Not-For-Profits

- **Majority of staff are boomers**
- **Staff are aging, year by year**
- **How does this impact?**

---

If we know that the majority of staff are baby boomers, and we know that this boomer “bubble” is moving steadily forward, year by year, what does this mean to our workplaces?

# Impact of Gender

- **By and large, women are the caregivers in our society**

---

Although it is more common today than thirty years ago for men to assume a caregiver role to either children or seniors, it is still women who by and large are the caregivers in our world.

It is also speculated that if family income will be lost as a result of care giving, the person with the least income to lose will assume that role. Unfortunately, this will be women in most cases.

# Women as Caregivers to Children

- **Most significant to the lower end of the Boom**
- 

Women born at the end of the baby boom, in the early sixties are the most likely to have children still at home.

Women are also the most statistically likely to be single parenting.

# Women as Parental Caregivers

- **Most significant to the leading edge of the Boom**

---

Women born in the late forties are now in their early fifties, and with parents in their seventies and eighties. For those parents who require personal care to remain in their homes, these women will begin to take on heavier parental care roles.

# Cycle of Elder Care

- **Aging population – more demands on health care system**
- **Increased demands – health system struggles**
- **Struggling system – more need for home care**
- **Increased home care – increased demand on adult children**

---

This example illustrates how the needs and demands of one age cohort impacts on the lives of others.

# Sandwich Generation

- **People who are faced with being caregivers to both children and aging parents**

---

While the majority of parental care situations involve older parents, there are no age limits. It is not unheard of for middle aged people to be attending to the needs of both parents and children.

# Personal Health

- **If we accept that health problems increase with age, then we can expect to need to be away from our jobs more because of health problems**

---

An often neglected variable in the caregiving continuum is the issue of self care. As people reach their fifties, personal health problems may become more frequent.

**Age who needs it?**

# Age

- **We can't avoid it**
  - **We all complain about it**
  - **So many work issues are at least partly determined by age**
  - **Structure, hours worked, seniority, sick leave, promotion, vacation leave, retention, recruitment, performance to name a few**
- 

While we know that we have little control over aging, if we better understand the impact on the workplace, we may have the opportunity to be proactive in our response.

We will look at some of the areas which are and have been effected by population trends.

# Corporate Structure

- **Dependent on resources**
- **Primary resource is people**

---

If there is a phrase that has had a major impact on thousands of lives in the last twenty-five years, it would have to be **downsizing**.

Why did organizations begin to downsize? What things changed to bring this about? Why did corporate structures need to change?

# Corporate Structure

- **60's and 70's saw steady growth**
- **Triangle structural model worked**
- **Steady supply of new workers at the bottom of the triangle**

---

The triangle model, with managers at the top and entry level workers at the bottom was never questioned as a viable model as long as there was a steady supply of resources (people).

With corporate growth came the expansion of the bottom layers of the triangle, steadily pushing senior workers into middle and upper management positions.

# Corporate Structure

- **Mid 80's saw population begin to decrease**
  - **Employers struggled to maintain status quo**
  - **No ability for growth**
- 

Birth rate decreases in the early to mid sixties now began to have an effect on organizations.

Without an ever increasing supply of new workers at the bottom of the triangle, upward movement ground to a halt.

While there have been small growth spurts in the economy, the problems associated with these events continue today.

# Workers

- **Feelings of going nowhere**
- **The Boomers had all the good jobs**
- **Boomers still 20-25 years from retirement**

---

For workers who had not already achieved supervisory or management positions, this was a scary situation. With 0% or negative growth, no new management positions were being created, and no one already in these positions was going anywhere.

The leading edge boomers had all the good jobs, and they were still 20-25 years from retirement. Workers looking up the ladder had a very long view indeed.

Workers found themselves “stuck” somewhere in the middle of the triangle.

# Small Organizations

- **Including Not-for-Profits**
  - **Little upward mobility**
  - **No growth**
  - **Stuck**
  - **“Be thankful for what you’ve got” attitude**
- 

While many of the not for profits, by the very nature of their size, did not seem comparable to large corporations, they too saw the effects of these demographic changes. They too, saw growth or birth in the seventies, and they too felt the effect of lack of growth.

As our mini poll has indicated, they too are filled with boomers.

Small organizations, who had very little upward or even lateral mobility to start with, became stuck, and a be thankful attitude prevailed.

# Seniority and Promotion

- **For many years, seniority meant advancement**
  - **Then, seniority simply began to mean “getting older”**
  - **Middle and upper management jobs were clogged with boomers**
- 

Workers began to see their life plans change, and not for the better. They were stuck, they were getting older, and because the same thing was going on everywhere, there was not much opportunity for changing jobs.

# Hours Worked

- **Many older workers were ready physically and financially to work less hours**
- **Instead, they were often asked to work more, not less**

---

Not only was upward mobility slowed or stopped in the triangle model, but often the flow was reversed. Workers were often asked to “do more with less”, and people occasionally had to go downwards in the triangle in order to keep their job. This did not make for happy campers.

# Impact of Aging

- We tend to think of aging as a negative phenomena
- We often forget the positive aspects of being older and in the workforce

---

Having spent some time looking at the doom and gloom side of aging in the workplace, lets not lose sight of the fact that there is a positive side of aging.

# Workplace Benefits

- **Workplace needs experience and depth of knowledge**
  - **The ideal is a balanced workplace**
  - **A mixture of experience and knowledge with new ideas and enthusiasm is ideal**
- 

One of the strategies used in the past to “flatten” or downsize organizations has been the promotion of early retirements. And while the plus side of this strategy is freeing up some steps on the ladder, the downside is often a tremendous drain of knowledge and experience out of the organization.

A workplace, especially one that plans and needs to be around for some time, needs that depth of knowledge that comes with job maturity.

So, while “fresh blood” and new ideas are always beneficial, so too is the knowledge and experience of the older worker.

The ideal workplace is the mixture of younger and older.

# Employers

- **Remember that clientele and customers are also getting older**
  - **Employers need to retain older workers while recruiting younger staff**
  - **Need to balance needs with availability and future strategic planning.**
- 

Employers needs may be different from those of workers, but they too find it in their best interest to retain some older workers. Without these workers, who often fill an informal mentor role, training costs would increase.

As the workers age, we often see the customers and clientele age as well. Many older clients prefer to be served by mature workers rather than whippersnappers.

For an organization which plans to be around for some time, an even balance and flow of labour is essential.

# Employers

- **For employers, the balance is the bottom line (whether profit or productivity) vs benefit to employees**

---

Each of these in turn will effect the other. Staff morale and commitment can directly effect the bottom line, and the bottom line, through financial incentives, can effect the staff well being.

# Employees

- **Need for a change, and changing needs**
  - **For some but not for all**
  - **Aging may mean different responsibilities outside of the workplace**
  - **Needs affected by degree of financial security**
- 

The reality is that not all employees want or need the same things. In any workplace there is often a resistance to change.

Some employees situations change very little as they get older, but for others, their lives outside of work are constantly changing

Financial security for workers can never be downplayed. The worker who lives from hand to mouth is often in a poor position to make changes.

# Stagnant Workplace

- **No “new blood”**
- **Boredom**
- **Lack of mobility, either upward or lateral**

---

The stagnant workplace is not necessarily the end result of our discussions, but it can be one of the results

A stagnant workplace is often an unhappy workplace, and productivity and people often suffer.

# Changing Needs

- **Elder care, child care**
- **Sick leave**
- **Some needs driven by financial security**

---

As staff age, needs change for some. Need to provide parental care, sometimes mixed with childcare, increased need for personal health time away from work, and new needs around financial security often become the focus in the workplace.

# Other Issues

- **Elder and childcare issues not limited to “older folks”**
  - **Problems of succession**
  - **Different view of the workplace for younger workers**
  - **Workplace strategies must include all ages**
- 

Not all problems are attached to attached to aging. Childcare is obviously a bigger problem for younger workers than for old.

The problem of succession and of changing leadership is the stuff of a whole other project.

The literature also suggests that there is often potential conflict between older and younger workers. The work philosophy of these groups is not the same. Mature workers often graduated from their training, found a job, and made that job their career. Younger workers today are much more transient and see any job as a stepping stone.

# Work Life Balance

- **This is the term most commonly used to describe the struggle to balance the often competing pulls of work and personal life**
  - **Often are different needs for employer and employee**
  - **Successful workplaces must include both employer and employee participation in finding solutions**
- 

Work-Life balance has become a field of study in and of itself.

Work-Life balance issues are often complex, seeking solutions to problems where employer and employee needs are different.

# Government Involvement

- **Many provinces in Canada have realized the importance of these issues, and are working towards solutions**
  - **There is no national initiative at this point, but there are discussions**
  - **These issues are most advanced in the United Kingdom**
- 

In spite of the “goodness” of efforts to achieve work-life balance, it is not an easy process. Governments, being large employers themselves, are cautious about endorsing initiatives that may cost them dearly in the future.

At the same time, most governments are involved at some level in discussions regarding these issues.

# The British Experience

- **More research has been done in Great Britain than in North America**
  - **Government is more involved**
  - **Coalitions of workers and employers have been established to promote work life balance**
  - **A rewards system has been established**
- 

The biggest impetus in Britain has likely been in the area of childcare. Out of this has grown a national forum for discussion of work-life balance issues

Government has listened, and responded with legislation to improve working conditions.

Although more work has been done in Britain, we see that in North America we are often well ahead in these matters. For instance, British legislation only recently brought maternity leave standards to a point where they have been in Canada for some time.

# Workplace Culture

- **THIS IS A CRITICAL CONCEPT**
- **Has to do with relationships, philosophies, and practices within the workplace**
- **The experience has been that when workplace culture does not change, even good programs are rarely successful**

---

This is the heart of this discussion. How people perceive the workplace, who is involved in decision making, how does communication take place are all questions whose answers are critical to healthy work-life balance.

# Workplace Culture

- **Workplace culture changes have been difficult in union settings**
  - **Unions want to entrench new practices in collective agreements, managers are hesitant to commit themselves**
  - **Employers feel trapped**
  - **Both sides (adversarial) claim credit if successful, blame the other if not**
- 

This is not a bit of union bashing!

In unionized settings, the collective agreement often defines the workplace culture, and unfortunately may define the culture as adversarial.

Discussions and definitions of rights, privileges, and benefits may become bogged down in the negotiating table setting.

# Workplace Culture

- Will determine if strategies are successful
-

# Strategies for Change

- **In Britain and Europe, some strategies have been very successful, some have not**

---

Very often time is the single biggest factor. People, both employers and employees, want good things to happen quickly. But what often needs to happen is some time to adjust and evolution to take place.

# Different Strategies meet Different Needs

- **Success is often shaped by workplace culture, so what is successful one place may not be in another**

---

Comparisons need to be made with organizations with similar cultures, rather than with those doing similar work.

# Barriers to Success

- **Entrenchment**
  - **Moving too fast**
  - **Internal resistance**
  - **Perceived “unfairness”**
  - **Cost**
  - **Change is scary**
- 

There are many reasons why what seems to be a great idea to someone may falter in its planning and implementation.

Employers, or employer/employee groups who are “gung ho” to implement change, may rush ahead too quickly, or try to make too many changes at once.

Even terminology can be a hindrance. In both Europe and North America work-life balance was originally called “family-friendly practices”, but perceived unfairness hastened the change of terminology.

# Incentives

- **Better bottom line for employers**
- **Well being for employees**

---

While the advantages of a healthy workplace seem a little more obvious for employees, they are sometimes not so clear for the employer.

Often, the payoffs of better productivity, or better morale, seem a little fuzzy.

# Business Plan

- **Retention**
  - **Recruitment**
  - **Training**
  - **Less time off due to stress**
  - **Trust-based culture**
  - **Increased productivity and motivation**
- 

In the UK, business plans are used to try to sell the idea of work-life balance.

Reduced turn-over, easier recruitment, reduced training costs, reduced time-off can all be big time and money savers to an employer.

# Strategies

- **These strategies are by no means exhaustive**
  - **They are not rank ordered in any way**
  - **Again, different needs, different workplace cultures, and different resources available will determine the choice and success of strategies**
- 

We will see a few of the strategies that workplaces have tried.

Again, these typical strategies success will be dependant on any number of variables.

# Strategies – Flex-time

- **Employees work a set number of hours, but *when* they work them is flexible**
  - **There is usually a range of time when hours must be worked**
  - **There may be conditions that certain hours need to be covered**
  - **Somewhat similar to shift work**
- 

Flex-time tries to balance the problem of outside responsibilities with the need to get the job done.

The employer sets parameters of working hours, and the employee chooses the hours they will work.

For example, an employer may say that employees have to work a seven and a half hour day, and those hours have to fall between 7:00 am and 9:00 pm, with four of the 7 1/2 hours falling between 9:00 am and 6:00 pm.

This is not seen as shift work per se, as workers may be starting and finishing work at several different times.

# Strategies – Flex-time

- **LIMITING FACTORS:**
    - **Customer or clientele needs**
    - **Employee response**
    - **Type of work**
- 

Type of work is the biggest variable. If the purpose of the job is to provide daycare for the children of non-shift workers. It will not likely make sense to have people working in the middle of the night.

# Strategies – Flex-time

- **ADVANTAGES:**
    - **Good for workers with outside responsibilities at certain times of day**
    - **Number of hours is not reduced**
- 

This can be very helpful for the worker who perhaps has child care responsibilities in the morning, but has someone else to provide care in the evening.

And no hours are lost.

# Strategies – Flex-time

- **DISADVANTAGES:**
    - **Scheduling difficulty**
    - **May be too many employees at some times, not enough a others**
- 

In an organization with many workers coming in at different times, this could be a scheduling nightmare

The ideal, of course would be to have workers spread out over time. In some situations where this has been tried, a situation of too many people at one time and not enough at others has arisen.

# Strategies – Job-sharing

- **Already common practice in many workplaces**
  - **One job – two workers**
  - **Not necessarily 50/50**
- 

Job sharing is already quite a common practice.

Although the split is usually 50/50, there is no rule to say that that has to be so.

# Strategies – Job-sharing

- **LIMITING FACTORS:**
    - **Need for continuity**
    - **Type of job**
    - **Available workers**
- 

Some feel that continuity is lost by splitting the job in two. That is probably an issue in some types of work, but not in others.

It is also common for someone who wants to job share to find a qualified partner.

# Strategies – Job-sharing

- **ADVANTAGES:**
    - **Two sets of knowledge and experience**
    - **Meets employees needs for part-time**
    - **Meets employer need of full-time position**
- 

This may be very helpful for the employer in terms of training, as two sets of knowledge are retained. The employer also does not have to convert a full-time position to a half-time position.

It may be particularly helpful for employees who wish to remain with the employer, but need to work less hours.

Job sharing can be done on an hourly, weekly or monthly basis.

# Strategies – Job-sharing

- **DISADVANTAGES:**
    - **May be partial rather than full benefits**
    - **Lack of continuity**
    - **Who owns the full-time position?**
    - **May be more costly to employer**
- 

If an employer only pays benefits based on hours worked, then the employee may go from full benefits to partial benefits.

There are often questions as to which of the employees may have ownership of the position.

If the employer pays full benefits to both employees, then it will be more costly for the employer.

# Strategies – Deferred Salary

- **Employee works at reduced salary for set number of years in order to pay for time off at a future date**
  - **Options in terms of time are wide**
  - **May be a case by case deal between employer and employee, or standardized practice within the workplace**
- 

Deferred salary is most commonly seen in educational settings.

# Strategies – Deferred Salary

- **LIMITING FACTORS:**
    - **Employees financial security**
    - **A lot can happen in 6 or 7 years**
    - **Extra, complex record keeping**
    - **Must be in accordance with tax laws**
- 

Any strategies which take place over several years will be difficult to manage and administer.

The biggest problem here is likely to be the difficulty with tax laws.

# Strategies – Deferred Salary

- **ADVANTAGES:**
    - **Up to one whole year of freedom**
    - **Paid for by employee, retains ownership**
    - **Time taken in a large block often better for both employer and employee**
- 

As this is paid for by the employee, there are not extra financial obligations for the employer.

# Strategies – Deferred Salary

- **DISADVANTAGES:**
    - **Not for all (may be perceived as unfair)**
    - **More and complex administration**
    - **Entails lengthy follow-through**
- 

There is sometimes a perceived unfairness about this idea, as it is really only practical to those who have the financial security to take a cut in monthly salary.

Once again, many things can happen over a five or six year period.

# Strategies – Work at Home

- **Modern technology makes this more viable now than it was years ago**
- **Workers do work from home, connecting with physical plant by phone, fax, and email**

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Working at home is gradually becoming a more common practice, mostly a result of improved technology.

# Strategies – Work at Home

- **LIMITING FACTORS:**
    - **Availability of technology (cost)**
    - **Type of work**
    - **Employee needs**
- 

Type of work is the biggest variable. If someone's job entails sitting in front of a computer most of the day, then it is possibly work that can be done from home. But if the job entails face to face customer interaction, it will not be an option.

# Strategies – Work at Home

- **ADVANTAGES:**
    - **Employees may be able to meet conflicting needs (work and child care) at the same time**
    - **Employees stay working who otherwise might feel compelled to quit**
- 

The advantages, in situations where the variables are right, are tremendous.

For the employee, the ability to manage conflicting responsibilities may be the key to keeping them in the workplace.

For employers, having staff working at home may considerably change the costs of the physical plant.

# Strategies – Work at Home

- **DISADVANTAGES:**
    - **Not for everyone**
    - **May be confidentiality issues**
    - **May result in more work**
- 

Not everyone works well from home. For some of us, there are simply too many distractions

Loss of contact with colleagues

# Strategies Phased-in Retirement

- **Instead of retirement happening all at once, employees reduce the amount of time worked over a set period**
  - **Set period is flexible, usually set in years**
- 

We often hear about the difficulties experienced by retired folks who find it hard to adjust to suddenly not having a job.

The idea with phased-in retirement is to let the individual gradually withdraw from the workplace and gradually enter into retired life.

Instead of retiring 100% at once, the employee reduces time worked each year by a specific amount, over a period of years.

# Strategies Phased-in Retirement

- **LIMITING FACTORS:**
    - **Limited by age**
    - **Limited by stability of workplace**
- 

Workplace stability is critical for any strategies which are going to carry over several years. There are many questions to be answered and many conditions to be set, I.e., what if after two years the person decides they want to go back to full-time employment?

# Strategies Phased-in Retirement

- **ADVANTAGES:**
    - **Allows employee a “taste” of retirement**
    - **Allows employer time for strategic planning (succession) and training**
    - **Allows adjustment to new financial situation for employee**
- 

If everything goes well, this strategy can work well for both employer and employee. In senior management positions, it can be a cost effective method of addressing the issue of succession.

For the employee who feels ready to retire, but does not have the financial security to do so, it provides for a little of both worlds.

# Strategies Phased-in Retirement

- **DISADVANTAGES:**
    - **Only available to those who can afford it**
    - **Longevity of process may be frustrating for others**
    - **Need organizational stability to ensure success**
    - **Only applicable with age**
- 

Unfortunately, there are many employees who would not see this as an option. Someone may feel that they have to maximize their earnings right up to the day they walk out the workplace door.

For the person who is succeeding the retiree, it may seem like a long time to wait.

# Strategies Extra Time Off

- **Employee has access to time off beyond the usual (vacation leave, sick time, statutory holidays, time in lieu,etc)**
  - **Extra time may be needed for extended eldercare**
  - **Time off may be with or without pay**
- 

The biggest issue here of course is whether time off is with or without pay. The fact that a person has suddenly gained major responsibilities outside of the workplace does not necessarily mean that the individual can afford considerable loss in income as a result of non-attendance.

# Strategies Extra Time Off

- **LIMITING FACTORS:**
    - **Cost to employer and employee**
    - **Continuity in workplace**
    - **Administration available**
- 

This is a situation where there are going to be some extra costs to somebody. In the not for profit sector, few employers have the financial ability to pay for additional time off. In that same sector, where staff are traditionally underpaid, few workers can afford to lose income.

# Strategies Extra Time Off

- **ADVANTAGES:**
    - **Time to meet other needs**
    - **If extra leave is paid by employer, no income loss**
- 

If cost is not an issue,extra time off meets the needs to fulfill other responsibilities.

# Strategies Extra Time Off

- **DISADVANTAGES:**
    - **If extra time is without pay there is loss of income**
    - **Too much time away from work may produce its own stress to employee and others**
    - **Cost to employer (financial, continuity)**
- 

This seems that it would be rarely a win-win situation

There is also a difference in taking time off work because you don't want to be at work as much, and taking time off work because you need to be elsewhere.

This is also a situation where other workers are affected by another's absence. If there is no cover-off (usually a cost issue), then it often means that other employees have to "take up the slack" while someone is away. This may produce its own stress both for the absent person and those who are left in the workplace.

**Not for profits**

# Not for Profit Strengths

- **Work is values oriented**
  - **Relaxed, non-threatening style of service delivery**
  - **High level of staff commitment**
- 

Not for Profits are usually well-liked, but not always well understood. As with so many things in life, the same attributes which are often assets may also turn out to be deficits. For example, a high level of staff commitment is often tied to long hours of work and subsequent burn-out.

# Not for Profit Issues

- **Staff in Not For Profits mostly women between 36-55**
  - **Women are primary care givers for both children and the elderly**
  - **Women most likely to be heads of single parent families**
- 

In the single issue of caring for others, demands on women are likely to increase in the years to come.

# Not for Profit Issues

- **Traditionally low paid positions**
  - **Stress levels can be high**
  - **Jobs often get done by staff working long hours**
  - **Often a perception that staff will do the work out of loyalty and commitment rather than because of healthy salaries and benefits**
- 

None of this is news to those in the not for profit sector. This is not to suggest that this only happens in this sector.

Situations often arise where because the perceived role is helping, often in emotionally charged situations, people feel guilty about charging for their services.

# Not for Profit Questions

- **In a values driven organization are those same values being put into internal employment practices?**
- **In low pay, long hours, high stress atmospheres, does quality of service and stakeholder value suffer?**

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In many not for profit organizations we often see loyal, dedicated workers and workplaces who provide much better care for their clientele than they do for themselves.

**Conclusions**

# Conclusions - Summary

- **Demographics indicate an aging workforce, primarily female, in many Canadian not for profits.**
  - **The demographics of the workplace indicate that issues such as eldercare, retirement planning, personal health and succession planning will be problems in the near future.**
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# Conclusions - Summary

- **Changing demographics will result in changing needs for both employers and employees.**
  - **The “old” way of doing things isn’t always working anymore.**
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# Conclusions - Summary

- **There is a need for a change in workplace culture, in values, in philosophies, in communication, and in beliefs.**
  - **To effectively change workplace culture requires the participation of all stakeholders at all levels**
-

# Conclusions - Summary

- **The common reference to these and other health workplace issues is the term work life balance.**
  - **There is some research and some experiential information regarding strategies for work life balance**
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# Conclusions - Summary

- **There are tested strategies for achieving work life balance, but many and diverse variables will shape the success or failure of a given strategy.**
  - **A strategy must be able to produce results within the given workplace culture. If not either the culture, the strategy or both must change.**
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# Conclusions - Summary

- **Not for Profit organizations have admirable strengths, but also have difficulties developing health work life balanced workplaces**
  - **Not for Profits, often with low pay, long hours and high stress, need to improve their work life balance**
-

# Conclusions - Tasks to be Done

- **There are no easy answers. The variables are many and diverse, each situation is unique, and resources are rarely plentiful.**
  - **This, however, is not justification for doing nothing.**
  - **There are certain fundamentals which can be pursued in the quest for the health workplace.**
-

# Conclusions - Tasks to be Done

- **Leadership is essential, in the not for profit sector, in individual workplaces, in government, and in funders**
  - **Champions need to be found, champions who have the vision, the integrity, and the stamina to bring about change**
-

# Conclusions - Tasks to be Done

- **In many situations, work must be done to bring about healthy workplace cultures.**
  - **There must be education about culture and about work life balance, and this education must happen at all levels.**
  - **Unions and employers must examine strategies for working together in the best interests of all.**
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# Conclusions - Tasks to be Done

- **Special care needs to be taken to be as inclusive as possible, with different levels of input, but always including those disagree as well as those who agree.**
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# Conclusions - Tasks to be Done

- **One of the skills in the process must be that of patience. Time must be taken to study, to analyze, to prioritize, to implement, and to evaluate**
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# Conclusions - Tasks to be Done

- **It must always be remembered that the goal is balance, balance of employer needs and employee benefit, of old and young, and most of all, a balance of our lives at work and our lives at home.**
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# The Muttart Fellowships



## **Bob Sims**

2000 Muttart Fellow

Bob is the Executive Director of Saskatoon Crisis Intervention Service, a 24/7 professional crisis intervention service.

Bob has been the director of Crisis Intervention since 1986, but has been involved with the organization since they opened their doors on September 1, 1980.

In his years in the field of crisis intervention, Bob has served on numerous local, provincial and national boards and committees. Bob has served as President of the Canadian Association for Suicide

Prevention, and the Chair of the Minister's Alcohol and Drug Abuse Advisory Council in Saskatchewan.

Bob has his Bachelor of Arts degree from University of Saskatchewan. He has been involved in community based organizations for 25 years.

Bob lives on an acreage outside of Saskatoon, with his wife Michelle and youngest daughter Jillian. He has two adult children, Nicole in Evans Lake B.C. and Jesse in New York.