

Articles

An Aging Workforce: A Manitoba Perspective

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ABSTRACT

This paper reports on the results of an online survey that asked Manitoba employers about the employment of older workers. The survey attempted to gain insight into benefits of and challenges to engaging older workers; strategies to recruit, retain, and engage older workers; and the role of education and training for older workers. This research was informed by an earlier inquiry about age, work, retirement, and lifelong learning where focus groups were conducted with senior management and selected human resources (HR) managers in a public sector organization. Those results were reported at the Canadian Association of University Continuing Education (CAUCE) Conference in 2010. The results of this survey provide a look at practices for retention, recruitment, and engagement of older workers, and they outline organizational conditions that allow those practices to be successfully implemented.

RÉSUMÉ

Cette recherche rapporte les résultats d'un sondage en ligne qui questionnait des employeurs du Manitoba au sujet de l'emploi des travailleurs d'âge mûr. Ledit sondage tentait d'obtenir un aperçu des avantages et des défis que représente l'embauche de travailleurs d'âge mûr; une esquisse des stratégies liées au recrutement, à la rétention et à l'embauche de travailleurs d'âge mûr; et une idée du rôle de l'enseignement et de la formation pour les travailleurs d'âge mûr. La présente recherche est née d'une enquête statistique antérieure portant sur l'âge, l'emploi occupé, la retraite et l'acquisition continue du savoir dans laquelle des groupes témoins d'une organisation du secteur public étaient dirigés par des cadres supérieurs et des ressources humaines triées sur le volet. Ces résultats ont été rapportés lors du congrès 2010 de l'Association pour l'éducation permanente dans les universités du Canada (AÉPUC). Les résultats de ce sondage donnent un aperçu des pratiques de rétention, de recrutement et d'embauche de travailleurs d'âge mûr et décrivent les conditions organisationnelles qui permettent de réussir la mise en œuvre de ces pratiques.

INTRODUCTION

An overview of national and international research identified the trends of the aging workforce, and one trend, the low participation rate of older adults in lifelong learning, argues for continuous learning for older workers and changes in recruitment practices and job redesign (Descy, 2006). A majority of employers agree that the aging of their workforce will be a significant issue over the next three to five years, and its impact will be felt more strongly in the public sector where the median age of workers is higher than in the private sector and retirements are earlier. However, most organizations have not adopted new approaches to recruit and retain older workers. In fact, 83% indicate that their organizations use the same engagement strategies for older workers as with other age groups (Thorpe, 2008). Older adults' participation in lifelong learning activities is critical to individual and societal success (Hammond, 2004), but there is little research of that participation and little or no evidence to support the benefits it has for workplace development and the well-being of older adults (Sloane-Seale & Kops, 2004). At issue is the confluence of a growing older population, the employment expectations for that population, and the interest and readiness of older adults and employers to meet those challenges and expectations. Thus the problem, and opportunity, is to understand the significance of an aging population from the perspective of those who employ this population.

It is the intent of this paper to examine the relationship between work, age, and lifelong learning from Manitoba employers' perspectives. Hopefully, these insights will increase understanding of what is needed to retain and recruit older workers, identify practices for that retention and recruitment, and outline the organizational conditions for those practices to be successfully implemented. For purposes of this paper, older workers are defined as individuals age 55 and older. While older workers are the focus of this research, we recognize that there are issues related to youth unemployment and underemployment in Manitoba and Canada.

LITERATURE REVIEW

Advances in technology, health, and education have contributed to a major shift in thinking about aging and retirement. This changing view requires reconsideration of the relationship between age, work, and lifelong learning. For example, U.S. studies indicate that older workers may be working longer than they did 20 years ago. Many Boomers intend to work in retirement (AARP, 2003), that is, work full time past age 65, which represents an increase from 27% in 1992 to 33% in 2004 (Mermin, Johnson, & Murphy, 2007), and they want to phase into retirement rather than leave the workforce entirely (AARP, 2000; 2005) because they may be concerned about their ability to afford early retirement (MetLife Mature Market Institute, 2005). Businesses and organizations reap a number of benefits from recruiting and retaining older workers. Older workers provide age diversity and inclusion in work practices, ensuring that services are responsive to a diversity of customers, particularly the needs of an aging population. They provide a multigenerational workforce to complement strengths, mutual learning, and increased understanding across age groups. They hold skills, experience, and knowledge that may be adaptable and developed to the benefit of the organization and business demands. They raise the skills profile of the workforce and contribute to innovation, productivity, strong work ethic, and change (National Center on Workforce Development/Adult, 2008; Union of the Electricity Industry, 2008). Some of the other benefits of recruiting and retaining older workers include lower absenteeism, commitment, good judgment, knowledge of organizational history, and knowledge of other industries (DBM, n.d.; Department for Work and Pensions, 2001). Although older workers offer these benefits, including a "good fit" with job and culture of the organization, they also pose concerns and challenges to organizations.

Research indicates that many older workers experience age-based discrimination in the labour market because employers may give preference to younger workers for training and employment (Thorpe, 2008). Another issue facing organizations employing older workers is the myth about their productivity, rigidity, and inability to adjust to new technology and workplace changes. The literature also speaks to issues of lack of access and opportunity for career development, and workspaces that accommodate their lifestyles (Rocco, Stein, & Lee, 2003). As well, employers may be hesitant to hire and/or retain older workers because older workers typically earn higher wages and benefits based on age, experience, and seniority. Employers need to be cognizant of these challenges and concerns in order to avoid the negative consequences of employing older workers.

The literature suggests that employers use a number of strategies to employ and retain older workers such as flexible work arrangements, formal and informal phased retirement, and other options. Flexible work arrangements permit older workers to work flexible schedules, job share, and work from home and/or work seasonally (Eyster, Johnson, & Toder, 2008; Rocco et al., 2003). Phased retirement allows older workers to transition into retirement with the current employer rather than switch immediately from full-time work to full retirement (Eyster et al., 2008). Additional options to meet the needs of older workers are redesigning jobs; creating supportive, respectful workplaces; and developing flexible pension and benefit programs (DBM, n.d.; Thorpe, 2008).

In Canada, many businesses and organizations use strategies to engage older workers, including redesigning jobs, offering part-time and post-retirement work (Bowes, 2010), assigning special projects and mentoring opportunities, and tailoring wage and benefit packages. Efforts to recruit older workers are offered by service providers and some government agencies. These strategies include helping older workers find employment, developing employment web sites, holding job fairs, offering job counselling and training opportunities and providing education on valuing older workers (Eyster et al., 2008). The National Center on Workforce Development/Adult (2008) also reports a number of recruitment strategies, including employer referrals, collaboration with community partners to build pools of potential candidates, and tapping into retiree associations and seniors placement agencies.

Another facet of retention, recruitment, and engagement of older workers is training and education, which is often considered in terms of the perceived length of future job tenure and effectiveness of training related to increased job performance. While employers may hesitate to invest in training older workers if they perceive a shorter length of time over which they can amortize their investment (Wooden, VandenHeuvel, Cully, & Curtain, 2001), there are other factors that impact decisions, including learning ability, organizational culture, educational background, technological change, and attitudes of employers and employees. Some older workers have greater employment stability than younger workers and thus length of job tenure after training may be greater for them than younger workers. Regardless, education and training of older workers require adapting training methods and a learning environment to meet their needs, preferences, and learning styles, and it requires manager awareness training (Inder & Bryson, 2007) to help reap the benefits and avoid the pitfalls of engaging older workers.

For the purposes of this paper, the terms education and training are used interchangeably to describe formal in-house training—training courses the employer provides on-site; formal external training—training courses provided outside the organization by other providers; and self-directed learning, on-the-job training, mentoring and coaching, and involvement in communities of practice—activities employees undertake on their own to improve job skills (Wooden et al., 2001).

Overall, age-friendly practices are important to recruit, retain, and engage older workers (Union of the Electricity Industry, 2008). Research also identified creating flexible approaches to work, training, and careers (Lowe, 2004, McIntosh, 2001). Further, it appears that a reconceptualization of the concept of retirement and employment is important to enhance employment opportunities for older workers.

THE STUDY

The online survey was structured to gain a perspective to gain a perspective from employers about benefits of and challenges to engaging older workers; strategies used to retain, recruit, and engage older workers; and participation in education and training (see Appendix). This research was built on an earlier inquiry about age, work, and retirement, and lifelong learning where focus groups were conducted with senior management and selected HR managers in a public-sector organization. The results were reported at Canadian Association of University Continuing Education (CAUCE) Conference in 2010.

METHOD

A survey method was used to collect data from Manitoba employers, which allowed for collection of large data sets (Babbie, 1995; Creswell, 2009; de Leeuw, 1992). The online survey contained items designed to gather employer perspectives on older workers, specifically on strategies to recruit and retain older workers, strategies to transfer knowledge from older workers, and the benefits and barriers to the engagement of older workers. The survey was developed using questions from a Conference Board study (Thorpe, 2008), the results of focus-group interviews conducted in 2010 (with modifications to fit the Manitoba context), and the results of the feedback from the pretest of the survey.

POPULATION AND SAMPLE

This survey consisted of a purposeful sample of 226 individuals. The sample was drawn from the University of Manitoba Continuing Education database of 144 graduates of the Human Resource Certificate from 2010–2012. Only those who self-identified as HR managers, administrators, and supervisors were selected. An additional 82 HR managers were selected from a published list of Manitoba companies and organizations. The link to the online survey, with an explanation of the purpose, and instructions were sent electronically to the sample. After a second reminder, there were 84 respondents for a response rate of 37.2%. The 84 respondents consisted of HR professionals at various levels: managers (41%), directors (7%), executives (5%), administrators (23%), coordinators (16%), and other (8%).

DATA ANALYSIS AND RESULTS

The data were analyzed using the *SelectSurvey* tool. Descriptive statistics were developed for each of the following sections: (1) sector information, (2) concerns about older workers retiring, (3) strategies to transfer knowledge, attract, retain, and engage older workers, and (4) motivation and barriers to engagement. These results are organized according to these sections and

Table 1: Sector Information

Sector	Nos.	%
Government	22	30%
Manufacturing/ construction	12	16%
Retail	6	8%
Health	6	8%
Finance	4	5%
Education	3	4%
Other	20	27%
* No response	11	13%

Table 2: Organizational Size

Size	Nos.	%
<250	45	60%
251–499	5	7%
500–1,000	4	5%
1,001–1,500	3	4%
>1,500	18	24%
* No response	9	11%

Table 3: Unionization

Union	Nos.	%
Non-Union	30	48%
Union		
>75%	21	33%
50–75%	4	6%
<50%	8	13%
Total	33	52%
* No response	21	25%

presented below. Unless stated otherwise, responses are based on all (84) respondents. The numbers do not always compute to 100% because all respondents may not have answered all questions while other questions required multiple responses.

Sector information

Tables 1, 2, and 3 present sector information: industrial sector, organizational size, and the extent of unionization.

More than half (56%) the respondents in Table 1 were from the private sector organizations (manufacturing/construction, retail, and financial). Forty-two percent were from public sector organizations (federal, provincial, and municipal government, education, and health). Twenty-seven percent checked the other category (high tech, communications, transportation and distribution, and business services). When compared to a Statistics Canada report (2012, 2013), the respondent profile varies somewhat from the sector profile for Manitoba businesses, where approximately three-quarters are in the private sector and one-quarter in the public sector.

Sixty percent of the respondents are small employers (less than 250 employees), while 24% are from large organizations (with over 1,500 employees). According to the same Statistics Canada report (2012, 2013), about half of Manitobans are employed in organizations with under 500 employees, while two-thirds of survey respondents were from organizations of under 500 employees (see Table 2). This suggests that the respondent profile somewhat favours a perspective from smaller (versus larger) organizations.

A little more than half (52%) the organizations were unionized (see Table 3), with the most of these organizations having 50% or more of their employees in unions. According to a Government of Manitoba, Family Services and Labour report for the years 2006–2012 (Government of Manitoba, n.d.), about one-third of Manitobans are covered by collective (union) agreements, while about half of survey respondents were from organizations with at least some unionized employees. This suggests that the respondent profile may favour a perspective from unionized organizations.

*Concerns about older workers retiring***Table 4:** Concerns about Retirement

Concerns	Frequency of Mention
Loss of experienced leaders	19
Loss of corporate knowledge	18
Difficulty in succession planning	14
Difficulty filling future work	12
Loss of continuity with clients	8
Shortage of leadership talent	7
Reduced ability to relate to aging client base	5
Other	1

Table 4 describes respondents' concerns about older workers retiring. Sixty-two percent of all respondents indicated that their organizations were not concerned about older workers' retiring. Of the 38% of respondents who indicated that retirement of older workers was a concern, the three most serious concerns based on frequency of mention were loss of experienced leaders, loss of corporate knowledge and technical know-how, and difficulty in succession planning.

Strategies to transfer knowledge, attract, retain, and engage older workers

The following tables address the strategies employers use to retain older workers, transfer knowledge of older workers, as well as strategies to attract and recruit, and engage them.

Table 5: Strategies to Retain

Strategies	Frequency of Mention
Flexible work	24
Mentor/coaching	20
Education and training	15
Leaves of absence	14
Phased-in options	13
Job sharing/redesign	13
Special work assignment	13
Other	1

More than half (57%) of all respondents indicated their organizations used strategies to retain older workers (see Table 5). Of the strategies used, the three most effective mentioned were creating flexible work arrangements, encouraging mentoring/coaching programs by older workers, and offering education and training opportunities for older workers. However, if education/training and mentoring/coaching are considered together in the broader description of education and training discussed earlier, it ranks highest as an effective strategy to retain older workers with a frequency of mention of 35.

Table 6: Strategies to Transfer Knowledge

Strategies	Frequency of Mention
Hire replacements prior	30
Arrange mentoring	28
Document job processes	24
Job shadowing	17
Maintain on retainer	15
Phased-in retirement	10
Communities of practice	4
Other	5

Sixty percent of all respondents indicated their organizations use strategies to transfer knowledge from older workers, and the most frequently cited strategies were hire replacements prior to the departure of the older workers, arrange mentoring by older workers, and document job processes. However, if arranging mentoring and communities of practice are considered together in the broader description of education and training discussed earlier, it ranks highest as an effective strategy to transfer knowledge of older workers with a frequency of mention of 32.

Table 7: Strategies to Attract and Recruit

Strategies	Frequency of Mention
Rehire former employees	9
Request referrals	7
Campaigns all generations	6
Job search agencies	6
Special events	3
Special recruit campaigns	2
Other	3

The majority (82%) of all respondents indicated that their organizations did not use any specific and/or different strategies to attract and recruit older workers (see Table 7). In short, they use the same strategies for all workers. Of those who used strategies (18%) specifically to recruit older workers, the top four strategies mentioned were rehire former employees, request referrals from existing employers, direct campaigns toward all generations of workers, and hire job/executive search agencies with focus on older workers.

Table 8: Strategies to Engage

Reasons	Frequency of Mention
More productive	16
Satisfied Workers	15
Highly motivated	14
Lower absenteeism	13
Employer of choice	10
Higher profitability	9
Other	34

The majority (77%) of all respondents indicated that it was important to engage older workers and the most important reasons for doing so included having more productive workers, having more satisfied workers, and having more highly motivated workers (see Table 8).

*Motivation and barriers to engage older workers***Table 9:** Strategies to Engage

Strategies	Frequency of Mention
Equal opportunity	16
Offer meaningful work	15
Offer career development	14
Offer work flexibility	13
Focus on work–life balance	10
Adapt/modify work	9
Offer training	9
Pre-retirement guidance	5
Recognition of OW	4
Phased-in retirement	3
On-going communications	3
Other	3

Table 10: Motivation to Engage

Motivation	Frequency of Mention
Work ethic valued	46
People-oriented company	38
Financial reasons	36
Social interactions	34
Flexible employment	34
Age-friendly company	31
Decision autonomy	23
Social responsibility	21
Opportunity to improve skills	19
Interest in OW well-being	15
Education & training	14
Other	3

More than one-third (36%) of all respondents indicated that they used strategies to engage and/or motivate older workers (see Table 9), and the top strategies used included providing equal opportunity and fair treatment, offering meaningful work, offering continued career development opportunities, and offering work flexibility. If career development and training are considered together under the broader description of education and training discussed earlier, it ranks highest as an effective strategy to engage older workers with a frequency of mention at 23.

Table 10 outlines the motivational factors that employers suggested affect the engagement of older workers.

Respondents identified a number of factors that motivated older workers to continue participation in the workplace, including being valued for their work ethic, valuing a people-oriented company, financial reasons, and valuing social interactions and relationships, and flexible employment opportunities.

If education/training and improving skill development are considered within the broader description of education and training discussed earlier, the frequency of mention (33) ranks education/training higher in the list of factors to motivate older workers.

Table 11: Barriers to Engagement

Barriers	Frequency of Mention
Myths	31
Attitudes	30
Organizational culture	26
No access to development	22
Age, race, and gender	19
Lack of education & training	14
Other	8

education and training discussed earlier, the significance as a barrier to engaging older workers increases to be top ranked with a frequency of mention at 36.

Table 11 outlines the barriers that employers suggested affect the engagement of older workers. Respondents checked a number of barriers to engaging older workers, including myths about older workers (e.g., low productivity, rigidity, inability to learn), attitudes toward older workers (e.g., ageism, stereotypes), organizational culture and norms, and no access to advancement and development. However, if lack of access to advancement and development and lack of opportunity for education/training are combined in the broader description of

DISCUSSION

Understanding older workers is important to facilitate productive and meaningful workplaces. As well, identifying practices and organizational conditions are important for organizations to succeed in employing older workers. The following discussion relates to the perspectives from selected Manitoba employers on older workers' retirement, motivation, barriers to engaging older workers, and strategies to engage, attract, retain, and transfer their knowledge.

Older workers' retirement and retention

The results of this survey offer an interesting view on older workers in selected Manitoba organizations. The literature suggests national and international trends in aging or workers world wide, including lower employment participation rates of older workers (Descy, 2006) and lower participation rates in education and training. At the same time, there is a call for continuous learning for older workers and changes in recruitment practices and job redesign. Despite these trends and claims of an aging workforce—in Manitoba 25% of the province's population is over 55 years of age (Manitoba Bureau of Statistics, 2008)—the majority (62%) of the respondents in this survey (see Table 4) indicated that their organizations were not concerned about older workers' retiring. The Manitoba perspective varies somewhat from the literature, which indicates that although employers (80%) are aware of challenges their organizations will face in the next five years due to the aging workforce, the majority in the literature indicated that their organizations have done little to retain older workers because they perceive the problem to be in the distant future (Thorpe, 2008). These respondents may not be concerned because more than 57% have strategies in place to retain older workers and 60% use strategies to transfer their knowledge. One may speculate that these two factors may be compelling enough to allay employers' concerns.

It is interesting that those respondents who said that their organizations were concerned about older workers retiring identified the following key concerns: loss of experienced leaders, loss of corporate knowledge and technical know-how, and difficulty in succession planning. These concerns speak to the intrinsic value placed on older workers as well as the perceived benefits of older workers to their colleagues and their employers. These concerns also resonated in the literature, which stresses significant shortages of people with the right skills, experience, or leadership abilities; loss of corporate and technical knowledge; and difficulties in succession planning (DBM, n.d.).

Although the majority of respondents to the survey were not concerned about older workers retiring, more than half (57%) indicated that their organizations used strategies to retain older workers. Mentoring/coaching programs, which are forms of informal on-the-job learning, and participation in formally organized external education and training are seen in the literature (Descy, 2006; Wooden et al., 2001) as important strategies to retain and engage older workers. Moreover, there are advantages and disadvantages for both employers and employees regarding participation in education and training. Socialization or human capital theory suggests that training is an investment that is based on cost/benefit analysis where training is provided when there is a net positive benefit to both employers and employees. Benefits for employers include increased productivity and profitability, while costs are instruction and lower employee output. In contrast, benefits for employees include opportunities for promotion and career advancement and potentially higher salaries, while costs may be loss of leisure and family time, and lower earnings during training (Grayson, 1997; Wooden et al., 2001).

Benefits for both employers and employees depend on perceived length of job tenure and effectiveness of training (Wooden et al., 2001). Older workers have fewer years of employment to recover investment and have less room for career advancement and increased salaries. Therefore, they may be less motivated and less willing to participate in formal education and training because there may seem to be fewer tangible benefits to them. Employers may not support formal education and training for older workers because there is limited return on their investment due to a shorter length of time over which to amortize their investment.

In contrast, informal learning options may be more appealing to both groups because they require less financial investment. When considering a broader definition of education and training, it ranked high on the lists of priorities to retain, recruit, and engage older workers. This makes a case for employers to think about education and training more broadly as an effective employment strategy.

Motivation and barriers to engage older workers

Motivation and barriers to engage older workers are seen as critical. On the one hand, the survey results suggest that employers feel older workers are motivated to engage in their workplaces. The reasons suggest that older workers may not only be intrinsically motivated to engage in the workplace but also provide added value to their colleagues and their employers because of their work ethic and abilities. It also appears that they may be motivated to engage because of extrinsic factors, including financial reasons, social interactions, and flexible employment. In addition, more than three-quarters (77%) of the respondents indicated that it was important to engage older workers because of the benefits to the organization. These motivating factors suggest that managers are cognizant of the fact that a happy workforce is a productive and profitable one, and the consequences are lower absenteeism, recognition as an employer of choice, and higher profitability.

These perspectives are echoed in the literature with respect to benefits of engaging older workers. For example, the instrumental nature of the workplace is reflected in benefits such as an age-diversified workplace that is responsive to a diverse customer base; a multi-generational workforce that complements strengths, mutual learning, and increased understanding across age groups; skills, experience, and knowledge that may be adapted and developed to benefit the organization and business demands; and contribution to innovation and productivity. Older workers were also valued for their strong work ethic, lower absenteeism, reliability, commitment, dedication, and leadership (DBM, n.d.; Department for Work and Pensions, 2001; National Center on Workforce Development/Adult, 2008; Union of the Electricity Industry, 2008).

On the other hand, the employers surveyed identified challenges to engaging older workers. These challenges included myths about older workers such as low productivity, rigidity, and inability to learn; attitudes toward older workers such as ageism and stereotypes; and organizational culture and norms that discount the ability of older workers. These challenges suggest the existence of systemic barriers that older workers experience at workplaces. Research also agrees that older workers often face age-based discrimination in the labour market, such as preferential treatment given to younger workers with respect to training, hiring, and layoffs (AARP, 2002; Reynolds, Ridley, & Van Horn, 2005; Thorpe, 2008). Furthermore, ageism is often perceived as a barrier to advancement and retention because it is related to myths about older workers' low productivity, rigidity, inability to adjust to new technology and learn (Rocco et al., 2003) and a belief they possess few skills (Inder & Bryson, 2007). Contrary to myths about older workers' inability to learn, Campanelli (1990) argues that older workers are more adaptable, possess complex intellectual capital, work longer, offer more reliable service, and have fewer workplace accidents and injuries than their younger colleagues. Other research indicates that besides age, older workers bring their accumulated reservoir of knowledge, skills, and abilities to the learning environment, which supports their learning new knowledge and skills (Wooden et al., 2001).

Strategies to engage, attract, retain, and transfer knowledge

The literature indicates that it is important to engage older workers and recommends a number of engagement strategies, including redesigning jobs, offering part-time and post-retirement work (Bowes, 2010), assigning special projects and mentoring opportunities, and tailoring wage and benefit packages. However, despite the fact that 77% of respondents to the survey agreed that engaging older workers was important, only 36% had strategies in place to engage them, including providing equal opportunity and fair treatment, offering meaningful work, and offering continued career development opportunities. Interestingly, when continued career development and training are combined, they ranked as the most effective engagement strategy, which supports the claim made in the literature for continuous learning as an important engagement strategy for all workers, including older workers.

According to the literature, the majority of employers (83%) indicate that their organizations did not use different strategies to attract and recruit older workers; that is, they used the same strategies for all workers (Thorpe, 2008). Again, the results of this employer survey are consistent with the literature, in that the majority (82%) of the respondents indicated their organizations do not have any strategies in place to attract and recruit older workers. Rather they tend to use the same strategies for all workers.

With respect to retention of older workers, the literature suggests that employers use strategies such as offering flexible working arrangements, providing phased retirement options, redesigning jobs, and providing training opportunities (Eyster et al., 2008; Rocco et al., 2003). More than half (57%) of the respondents to the survey indicated their organizations used strategies to retain older workers. Although not fully congruent with the literature, the survey found that offering flexible work arrangements, encouraging mentoring/coaching programs by older workers, and offering education and training opportunities to older workers were considered effective strategies. About 60% of employers surveyed used strategies including hiring replacements prior to the departure of older workers, arranging mentoring by older workers, and documenting job processes to assure knowledge transfer. These perspectives fit with the literature, which indicates that although most employers are aware of challenges their organizations

will face in the next five years due to the aging workforce, 70% have indicated that their organizations have done little to retain older workers. This lack of action appears to be because employers perceive the problem to be in the distant future (Thorpe, 2008).

CONCLUSION

The results of the survey provide a glimpse into Manitoba employers' perspectives on the aging workforce in the province. However, the research is not intended to minimize the significance of the younger workers to the Manitoba economy. This represents a meaningful demographic shift because 25.0% of the province's population is now over 55 years of age, with a prediction that the older adult age group will increase by 21.7% by 2018 (Manitoba Bureau of Statistics, 2008). Compared to the profile of all Manitoba employers, a greater proportion of employers responding to the survey were from larger, unionized, and public-sector organizations. With this in mind, it appears that responding employers are aware of the issue but vary in their efforts to take specific action to retain, attract, and engage older workers.

On the question of an aging work force, specifically the ever-increasing rate of retirement of older workers, only a third of the Manitoba employers surveyed indicated a concern. This statistic does not fit with what is generally reported in the literature where employers agree an aging workforce is an issue for the future. One can only speculate that the lack of concern by Manitoba employers results from the fact that they have not yet experienced labour shortages or reductions in productivity due to loss of organizational knowledge and experience, which happens when older workers leave. In part, this collective experience also may be a reflection of the "baby boom" generation just beginning to reach retirement age, and there may be limited awareness of the loss of (and conversely benefits of retaining) older workers. The employers who were concerned about losing older workers to retirement talked about a loss of knowledge and expertise, and the majority had strategies in place for knowledge transfer. This action on the part of some employers may be an indicator of what others will consider in the future.

At some point, more Manitoba employers may realize that it is necessary to consider robust retention and recruitment initiatives in order to keep and attract older workers to their organizations. At the moment, about 60% of Manitoba employers have strategies in place to retain older workers, but only 20% indicated strategies existed to recruit or attract them. This is typical of what other researchers have found where most employers have not adopted new approaches for retention and recruitment of older workers. It may be safe to assume that while employers are not recruiting older workers directly, their general recruitment efforts will include older applicants who will be considered based on job qualification.

Those employers who had specific recruitment strategies in place relied primarily on in-house recruitment efforts, including rehiring former employees and using referrals from existing employees. Efforts to retain older workers were more prevalent with strategies identified as providing older workers with flexible work schedules, mentoring and coaching opportunities, and training/education sessions. All are typical of recommended actions when employers want to retain older workers. The fact that older workers are motivated by both intrinsic and extrinsic factors is important for employers to understand. Establishing working conditions that retain as well as engage and motivate older workers provides a win-win outcome for workers and employers. In this regard, the news is positive for Manitoba as employers indicated an awareness of factors that motivate older workers and many had developed strategies to engage them, specifically by creating meaningful jobs, ensuring fair and equal treatment, and providing career development opportunities.

One of the questions of interest in conducting this survey was how important the participation of older workers in training and education (continuous learning) is to the creation of productive and meaningful workplaces. As argued in the literature continuous learning is important to older workers, and there is evidence to support this view from Manitoba employers. Defining education and training more broadly to incorporate self-directed learning, career and skill development, communities of practice, and mentoring/coaching expands the determination of what is happening with respect to continuous learning in the workplace. It is interesting to note that Manitoba employers who developed strategies for retention, knowledge transfer, engagement, and motivation of older workers ranked strategies related to education and training highly. Conversely, they recognized that limitations on education and training opportunities are some of the most critical barriers to the engagement of older employees in the workplace.

This recognition by Manitoba employers of the importance of continuous learning for older workers is encouraging, and most would agree that continuous learning is a good thing for everyone, especially older adults. There is strong evidence that this kind of mental activity is critical to successful aging (Sloane-Seale & Kops, 2008). It can be assumed that older workers will benefit from continuous learning with respect to their productivity, currency of skills/knowledge, sense of well-being, and an ability to take on new challenges. In addition, organizations will benefit from training all workers, including older workers, in a way that ultimately gives them the benefits of a more skilled and high-performing, age-diversified, engaged workforce, which results in returns on investment in training and education both in the short and long term.

Based on the survey of Manitoba employers, there are practices in place to recruit, retain, and engage older workers. These practices, listed below, are worthy of consideration by other organizations as they begin to examine how to maximize the advantage of an aging workforce.

Retain older workers

- Encourage mentoring/coaching
- Offer education and training opportunities
- Provide leaves of absence
- Develop options to allow workers to phase into retirement
- Create flexible work, job sharing, and job redesign
- Create special work assignment to take advantage of expertise

Transfer knowledge from older workers

- Hire replacements prior to retirements
- Arrange mentoring/job shadowing between older and young workers
- Create detailed documentation of work practices and expert systems
- Create options to contract/retain older workers
- Create communities of practice

Attract and recruit older workers

- Rehire workers who have previously retired/left
- Request referrals for new hires from existing employees
- Structure recruitment efforts to be inclusive of all age groups

Engage older workers

- Ensure equal opportunity/fair treatment of older workers
- Offer meaningful work to older workers
- Offer career development and training opportunities
- Create work/scheduling flexibility to enhance work-life balance and retirement transition

While identifying meaningful practices is useful, it is equally important to understand organizational conditions that allow these practices to be successfully implemented. Manitoba employers identified a number of conditions that encourage engagement and commitment of older workers:

- Value older employees for work ethic, commitment, and expertise, and provide adequate financial incentives and rewards
- Promote a people-oriented organization to foster an age-friendly atmosphere
- Disclaim myths and stereotypes of older workers to eliminate bias and age discrimination
- Provide opportunities for career development, training, and education for older workers
- Create flexible employment arrangements to accommodate personal/life changes and transition to retirement

Overall, the results of the survey make a number of contributions to the relationship of work, age, and lifelong learning by comparing the Manitoba context to the general perspective based in the literature. Specifically, a selection of Manitoba employers have gained insight on a range of issues—concerns for increasing rates of retirement, and strategies for knowledge transfer, recruitment, retention, and engagement. Given the perspectives are solicited from employers, it is clear the same questions need to be asked of employees and unions to gain a more comprehensive sense of issues related to participation of older workers. This is the intent of future research. Furthermore, it would be interesting to look more closely at workplace training and education of older workers, specifically relating to participation in training/educational activities, definitions of education and training, and motivation and barriers to participation. Gaining this understanding will assist with the development of productive and meaningful work and career opportunities for older workers.

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BIOGRAPHIES

Atlanta Sloane is Professor and Program Director, Continuing Education, Extended Education, at the University of Manitoba. Her research interests include older workers and successful aging, accessibility, gender differences, program planning (such as needs assessment, program evaluation, and curriculum development), mentoring and professional development, management development for women, career progress, retention and recruitment of adult learners, and leadership development and succession planning.

Atlanta Sloane est professeure et directrice des programmes de l'éducation permanente et de la formation continue (Extended Education) de l'Université du Manitoba. Ses recherches portent surtout sur les travailleurs d'âge mûr, le vieillissement harmonieux, l'accessibilité, les différences entre hommes et femmes, la planification de programmes (comme l'évaluation des besoins et de la qualité des programmes, ainsi que l'élaboration de curriculum), le mentorat et le perfectionnement professionnel, le perfectionnement de la gestion chez la femme, l'avancement professionnel, la rétention et le recrutement des apprenants adultes, le développement des qualités de chef et la planification de la relève.

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APPENDIX

Older Workers Survey: Human Resources

Preamble

This study focuses on increasing understanding of what is needed to retain and recruit older workers, identify best practices for retention and recruitment, and outline organizational practices that will lead to success in employing older workers. The questions focus on company demographics, retention, knowledge transfer, recruitment, and engagement strategies and practices. Most questions are composed of three (3) parts: a) do strategies exist in your organization; b) what strategies are used; and c) how effective are the strategies. Please answer each question to the best of your ability with the most current information available.

To ensure confidentiality and anonymity all identifying marks will be removed and codes used for all surveys. Only members of the research team will have access to the data, and at the completion of the study electronic files will be deleted and paper copies shredded.

Thank you for your participation.

Position: _____

Company/Organization: _____ Phone: _____

Sector: r Public r Private r Non Profit r Other

Section 1: Company/Organization Demographic Profile

1. Which of the following best represents your company?

- ☐ Federal government
- ☐ Provincial government
- ☐ Municipal government
- ☐ Manufacturing and construction
- ☐ High tech, communications, and business services
- ☐ Transportation, distribution
- ☐ Finance, insurance, real estate
- ☐ Retail
- ☐ Education
- ☐ Health or social services
- ☐ Other, please specify: _____

2. How many employees work in your company/organization?

- ☐ Fewer than 250
- ☐ 251–499
- ☐ 500–1000
- ☐ 1001–1500
- ☐ 1500 or more

3. What is the extent of unionization in your company/organization?
- ☐ Not unionized
 - ☐ Less than 50%
 - ☐ 50% – 75%
 - ☐ Over 75%
4. What is the average age of the employees for the following job categories in your company/organization?
- _____ years old – Upper management/Senior administration
- _____ years old – Professional/Technician
- _____ years old – Middle management
- _____ years old – Supervisory/Lower management
- _____ years old – Non-management/Non-supervisory
- _____ years old – Overall for all job categories
5. What percentage of the employees in your company/organization will reach retirement age (65 years old) in the next 5 years in the following job categories?
- _____ % – Upper management/Senior administration
- _____ % – Professional/Technician
- _____ % – Middle management
- _____ % – Supervisory/Lower management
- _____ % – Non-management/Non-supervisory
- _____ % – Overall for all job categories

Section 2: Strategies to Retain Older Workers

6. Is retirement of older workers a concern for your company/organization?
- a. ☐ Yes ☐ No
- b. If yes, please check as many of the following concerns that apply.
- ☐ Loss of experienced leaders
 - ☐ Loss of corporate knowledge and technical know how
 - ☐ Difficulty in succession planning
 - ☐ Shortage of future leadership talent
 - ☐ Loss in continuity of relationships with customers/clients
 - ☐ Difficulty fulfilling future work demands
 - ☐ Reduced ability to relate to an aging customer base
 - ☐ Other, please specify: _____
- c. Please list the top three concerns.
1. _____
2. _____
3. _____

7. Is retention of older workers an important issue?
- a. ☐ Yes ☐ No
- b. If yes, what strategies do you use to retain older workers? Check as many as apply.
- ☐ Offer special work assignments
 - ☐ Promote flexible work arrangements
 - ☐ Arrange job sharing/redesign
 - ☐ Provide phased-in retirement options
 - ☐ Offer programs to reduce biases and stereotypes about older workers
 - ☐ Encourage leaves of absence
 - ☐ Extend health-care benefits
 - ☐ Establish mentoring/coaching programs
 - ☐ Develop tailored rewards package
 - ☐ Become an age-friendly organization
 - ☐ Offer education and training opportunities for older workers
 - ☐ Other, please specify: _____
- c. If you use any of the above strategies, list the three most effective.
1. _____
 2. _____
 3. _____
8. Do you use any strategies to transfer knowledge from older workers?
- a. ☐ Yes ☐ No
- b. If yes, please check as many of the following that apply.
- ☐ Hire replacements prior to the departure of the older workers
 - ☐ Document job processes, including best practices, expert systems, key job competencies, and/or job aids, references, checklists
 - ☐ Arrange mentoring by older workers
 - ☐ Maintain key older workers on retainer for consultation
 - ☐ Encourage phased retirement
 - ☐ Conduct job shadowing or information exchange sessions
 - ☐ Establish communities of practice
 - ☐ Conduct critical incident interviews
 - ☐ Prepare video/audio archives
 - ☐ Other, please specify: _____
- c. If you use any of the above strategies, please list the three most effective.
1. _____
 2. _____
 3. _____

Section 3: Strategies to Attract and Recruit Older Workers

9. Do you use strategies to attract and recruit older workers?
- a. ☐ Yes ☐ No
- b. If yes, please check as many of the following strategies that are used to attract and recruit older workers.
- ☐ Re-hire former employees
 - ☐ Request referrals from existing employees
 - ☐ Direct campaigns toward all generations of workers
 - ☐ Recruit through unions or professional associations
 - ☐ Hold special events that may attract older workers (e.g., job fairs)
 - ☐ Use job search agencies (specialize in recruitment of older workers)
 - ☐ Contact temporary employment agencies
 - ☐ Use executive search companies
 - ☐ Plan advertising campaigns directed specifically at older workers
 - ☐ Other, please specify: _____
- c. If you implement any of the above strategies, please list the three most effective.
1. _____
 2. _____
 3. _____

Section 4: Strategies to Engage Older Workers

10. Do you use strategies to engage older workers?
- a. ☐ Yes ☐ No
- b. If yes, please check all the strategies that apply.
- ☐ Offer flexibility in work
 - ☐ Offer training
 - ☐ Offer career development
 - ☐ Provide equal opportunity/fair treatment
 - ☐ Adapt and modify work
 - ☐ Offer recognition program
 - ☐ Offer financial guidance/support for retirement
 - ☐ Provide total health program
 - ☐ Focus on work–life balance
 - ☐ Hold on-going communication with older workers
 - ☐ Encourage phased retirement
 - ☐ Offer meaningful work
 - ☐ Other, please specify _____

c. If you use any of the above strategies, list the three most effective.

1. _____
2. _____
3. _____

11. Do you think it is important to engage older workers?

a. ☐ Yes ☐ No

b. If yes, why is it important? Please check as many as apply.

- ☐ Develop a motivated workforce and workers
- ☐ Have a productive workforce and workers
- ☐ Increase profitability
- ☐ Have satisfied workers
- ☐ Be seen as an employer of choice
- ☐ Become recognized by sector
- ☐ Achieve low absenteeism rate
- ☐ Other, please specify: _____

c. Please list the three most important benefits for engaging older workers.

1. _____
2. _____
3. _____

12. Do you assess the engagement of older workers?

a. ☐ Yes ☐ No

b. If yes, how do you assess it?

- ☐ Formally with tests or other measures
- ☐ Informally through a personal appreciation of work environment

13. What prevents older workers from engaging in the workplace? Check all that apply.

- ☐ Attitudes towards older workers (ageism, stereotypes)
- ☐ Myths about older workers (low productivity, rigidity, inability to learn, etc.)
- ☐ Organizational culture and norms that do not support older workers
- ☐ Issues related to age, race, and gender
- ☐ Lack of access and opportunity for career advancement and development
- ☐ Lack of opportunities to participate in education and training
- ☐ Other, please specify _____

c. Please list the top three factors from the list above that prevents older workers from engaging in the workplace.

1. _____
2. _____
3. _____

14. What encourages older workers to engage in the workplace? Check as many as apply.

- ☐ People oriented organization
- ☐ Valued for work ethic
- ☐ Social interaction and relationship
- ☐ Financial reasons
- ☐ Age-friendly organization
- ☐ Opportunities to improve skills and capabilities
- ☐ Input into decision making
- ☐ Opportunities to make decisions and set personal standards
- ☐ Education and training opportunities
- ☐ Opportunities for flexible employment
- ☐ Employers' interest in older workers health and well-being
- ☐ Organization's reputation for social responsibility
- ☐ Other, please specify _____

b. Please list the top three factors from the list above that encourage engagement of older workers in the workplace.

1. _____
2. _____
3. _____

Thank you for taking the time to complete this survey.