



The Boomer Boon:

Generating ideas about engaging
baby boomers in the nonprofit sector

June 2010

HR Council for the Nonprofit Sector

The HR Council takes action on nonprofit labour force issues.

As a **catalyst**, the HR Council sparks awareness and action on labour force issues. As a **convenor**, we bring together people, information and ideas in the spirit of collaborative action. As a **research instigator** we are building knowledge and improving our understanding of the nonprofit labour force.

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Canada

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1 Introduction

The HR Council's work on a sectoral labour force strategy has produced a host of insights into the key trends and demands that are shaping the sector's need for people and skills.

This project is rooted in the work of the HR Council for the Nonprofit Sector (HR Council), specifically, its Labour Force Study and development of strategic directions for human resources and labour force issues in the sector. As stated in the introduction to the HR Council's first report on its Labour Force Study (2008a):

There is growing concern about the labour force challenges facing the voluntary and non-profit sector. There are more signs that organizations are less and less able to recruit the talent they need in today's tightening labour market. At the same time, retaining employees is also a challenge. An effective labour force equals an effective sector. Without improving the ability of the sector to recruit and retain workers – and without finding ways to build employees' skills – the sector will be less able to deliver needed services to Canadians and won't be making the best contribution to a strong, resilient social fabric in communities and for the country as a whole. (p.1)

To date, the HR Council's work on a sectoral labour force strategy has produced a host of insights into the key trends and demands that are shaping the sector's need for people and skills, and as well the factors affecting the supply of talent and the sector's ability to find the people it needs. Its survey of employers in the sector found, among other things, an acute awareness of the demographic reality of an aging Canadian workforce. This trend represents both a challenge and an opportunity. In the case of the former, there is concern that the departure of mature workers – the baby boom generation – will mean the loss of experienced workers from the sector. As for the latter, there was speculation about an emerging pool of skilled, older workers who may be prepared to make a late career transition from the public and private sectors to meaningful engagement in the nonprofit sector.

The hypothesis of this project on engaging baby boomers emerged out of this sense of opportunity:

High skills baby boomers represent a potential supply of labour, both paid and unpaid, for the nonprofit sector.

In keeping with its evidence-based approach to its work, the HR Council, with the support of HRSDC, determined that it will test the hypothesis in three phases. Phase One would entail identifying and framing the questions that need to be addressed before this premise can be advanced in a meaningful way. These questions would shape Phase Two – a daylong consultation of key informants who would gather to discuss the questions with an eye towards evolving workable strategies for action. Finally, Phase Three would involve crafting a set of recommendations that could be pursued by all parties with a stake in the development of a successful labour force strategy for the nonprofit sector.

The Boomer Boon: Generating Ideas about Engaging Baby Boomers in the Nonprofit Sector is a summary of this project. Phase One, as reflected in Sections 2, 3 and 4, is informed by both primary and secondary research, including interviews with key informants and a print and electronic literature review (please see attached bibliography). Section Two consists of an unpacking of the underlying premise – a high level consideration of the constituent parts of the hypothesis, as well as the assumptions they contain. Section 3 applies a labour market lens to the premise, identifying the issues arising from the perspectives of employers, existing employees, prospective employees, and labour market intermediaries. Section 4 presents a set of strategic questions intended to open the space for creative thinking and generate constructive dialogue about the hypothesis. Phases Two and Three of the project are summarized in Section 5.

The authors have made several assumptions that require clarification at the outset of this exercise. The first goes to the definition of the nonprofit sector, which is provided on page 3. In the ensuing discussion, references to the nonprofit sector (for purposes of brevity and convenience) are understood to encompass both nonprofit and volunteer

organizations that meet the defining criteria offered herein. The second assumption relates to the distinction between paid and volunteer work in the nonprofit sector. While the authors acknowledge the importance of distinguishing between the two (hence the formulation of the hypothesis), they also note that compensation notwithstanding, there are many characteristics in common between paid and volunteer work in the sector. In the context of this paper, the two are generally not distinguished unless it is critical to do so for purposes of clarity, such as in discussions of blended workforce issues. Finally, the authors would like to acknowledge their reliance on secondary US research sources, particularly with regards to psychographic information about baby boomers. This was necessitated by the absence of secondary Canadian sources. All economic, demographic, and census data are Canadian in origin. Other assumptions are addressed as they arise.

The authors would like to express their appreciation to the key informants whose perspectives helped shape Sections 2 and 3 of this document. They include:

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2 Unpacking the premise

High skills baby boomers represent a potential supply of labour, both paid and unpaid, for the nonprofit sector.

Any consideration of the hypothesis begins with a look at its constituent parts. Specifically:

- What exactly are we referring to when we speak of the nonprofit sector?
- What do we know about this sector's labour needs?
- What do we know about the high skills baby boomer cohort being proposed as a partial answer to the sector's labour needs?

What is the nonprofit sector?

For the purposes of this discussion, the definition of the nonprofit sector is derived from the National Survey of Nonprofit and Voluntary Organizations (2003). The sector is understood to encompass “the arena for non-market activity that goes on outside of government operations. Organizations are considered to be part of the sector based on their nonprofit status as well as what they do.” Identifying features of organizations in the sector include:

- Non-government (institutionally separate from governments)
- Non-profit distribution (no profits returned to owners or directors)
- Self-governing
- Voluntary (to some degree use voluntary contributions of time or money)
- Formally incorporated or registered under specific legislation with governments

Statistics Canada brings this sector into even sharper focus with its distinction between the overall nonprofit sector and what it refers to as the core nonprofit sector (as cited in the HR Council for the Nonprofit Sector, 2008a, p. 3). The former is understood to comprise all organizations meeting the above-referenced criteria, including hospitals, universities and colleges, while the latter excludes these institutions, encompassing only those organizations engaged in five spheres of activity:

- Sports/Recreation
- Health/Social Services
- Development/Housing
- Religion
- Other (including Arts and Culture; Education and Research; Environment; Philanthropy and Volunteerism Promotion; Law, Advocacy and Politics; International; and, uncategorized nonprofit activity)

The use of the term nonprofit in this paper refers exclusively to the organizations and activities in the core nonprofit sector.

In Canada, the nonprofit sector comprises almost 69,000 organizations employing nearly 1.2 million Canadians, or more than 7 per cent of the overall workforce (HR Council, 2008b, p. 8). Features of the nonprofit workforce:

- 76% are women, compared to 47% of Canada's overall labour force
- The average age of sector employees is 43.4, slightly higher than the overall labour force at 41.2
- Nearly all sector employees have completed high school and seven out of ten employees have acquired a post-secondary education
- 89% of employees identify themselves as white/Caucasian

- 71% hold full-time, permanent positions
- 21% of sector employees are union members
- Three quarters receive non-wage benefits, with the three most popular benefits being: drug plan (67%), life and/or disability insurance (64%) and dental care (61%)
- 53% have been employed by their current organization for more than five years, nearly a third have tenure exceeding 10 years
- 88% are satisfied with their current job, however some aspects of their work are less satisfying: access to retirement savings, compensation, opportunities for professional development and career advancement (HR Council, 2008b, p. 3)

Another defining characteristic of the non-profit workforce is its reliance on voluntary labour, defined as work without pay on behalf of a group or organization. According to Imagine Canada (2009) an estimated 12.5 million Canadians aged 15 and over volunteer their time over the course of a year. In 2007 they volunteered almost 2.1 billion hours – the equivalent of close to 1.1 million full-time jobs. Most of the contributed hours were dedicated to sports and recreations, social services, education and research, and religious organizations. The most frequent types of volunteer activities reported by Canadians include organizing or supervising events, fundraising, sitting on committees or boards, and teaching, educating and mentoring (Hall, Lasby, Ayer and Gibbons, 2009, p. 10).

Nonprofits constitute a diverse and robust economic sector, with a Gross Domestic Product (GDP) of \$35.6 billion in 2007, or 2.5% of the Canadian economy (Statistics Canada, 2009a, p. 9). Available economic data suggest the sector is growing.¹ The level of economic activity in the nonprofit sector nearly doubled between 1997 and 2007, growing by an annual average of 7.1% during that period. In comparative terms this was faster than

1. A caveat must be offered here. The most recent economic data available is for 2007, before the economic downturn of the last 18 months. While no quantifiable data is yet available to illustrate the impact of this downturn on the sector, one key informant compared it to a hurricane plowing through the nonprofit community, leaving devastation and destruction in its wake. Until the impact can be substantiated, all economic data and assumptions should be used with caution.

the Canadian economy as a whole, which grew by an average of 5.8% per annum during that period (Statistics Canada, 2009a, p. 9). Other notable factors and trends impacting the sector include:

Fragmentation

The sector is populated by small organizations (75% of them having fewer than ten employees) with few formal organizational links, spread out across a wide variety of activities. There is also a wide array of different occupations represented in this sector. This lack of homogeneity works against the development of a sectoral identity, and complicates the development of any kind of sector-wide strategy.

Challenges of a blended workforce

Among the unique features of the nonprofit sector is its reliance on the combined efforts of volunteers and paid employees to realize the mandates of its constituent organizations. In a sector where underdeveloped human resources management capacity is already an acknowledged concern, this feature adds yet another level of complexity.

Economic pressures

While the full impact has yet to be quantified, the recent economic downturn has amplified the challenges faced by the non-profit sector. Anecdotal reports suggest many nonprofits are struggling to reconcile decreased revenues from government transfers and investment income (and the attendant push to cut staffing and costs) with an increased demand for their services.

Demographic pressures

In terms of age, the nonprofit labour force skews slightly older than the Canadian labour force overall. This trend, coupled with the aging of both the population and the country's labour force has contributed to a concern among non-profit organizations about a looming leadership deficit, decreased management capacity, and a loss of "organizational knowledge" as a result of the retirement of baby boomers.

Competition for skilled labour

Within the next decade, a general labour shortage – throughout the economy and across the country – will become the norm of Canadian economic life. The number of people willing and available to work will be smaller than the number of jobs potentially available to them. Almost half of Canada's non-profits are already reporting that recruiting qualified people is either "difficult" or "very difficult". The reasons cited for this difficulty include:

- Few or no applicants to choose from
- Salary offered is too low
- Applicants lack relevant work experience
- Applicants lack skills required for the job
- Lack of money/funding for recruiting
- Competition from for-profit organizations and government agencies/departments (HR Council, 2008b, p. 17)

What are the skills needs in the nonprofit sector?

Almost half of the organizations surveyed by the HR Council either "strongly agreed" or "somewhat agreed" that their organizations had difficulties meeting their objectives because they didn't have enough employees. Furthermore, almost one in five indicated that they either "strongly agreed" or "somewhat agreed" with the proposition that their organizations had difficulty meeting their objectives because their employees don't have sufficient skills (HR Council, 2008b, p. 23).

The nonprofits surveyed by the HR Council identified a number of generic and specialized skills where their organizations' needs are being either "partly met" or "not at all". Included among the former are computer skills and time management skills. As for specialized skills, those lacking include:

- Legal knowledge
- Marketing
- Campaigning
- Research

- Fundraising/resource development
- Strategic planning
- Monitoring and evaluation
- Understanding of technology
- Finance
- Contract management
- HR/personnel management
- Project management (HR Council, 2008b, p. 21)

Looking ahead, one-third of the nonprofits surveyed believe that two years from now the skills required by their organizations will be either “somewhat different” or “substantially different” from today.

Who are the high skills baby boomers?

Quantifying the cohort referred to as high skills baby boomers is a challenging proposition inasmuch as there is no widely accepted definition of the category. At a very high level, it can be assumed that the cohort is a subset of the approximately 11 million Canadians born between the 1946 and 1964 who fall within that conventional definition of baby boomers. Baby boomers comprise the largest single cohort in the population, and have come to be referred to as a “ticking demographic time bomb” because of their growing impact on rising health costs and the shrinking tax base.

Parsing the qualifier “high skills” helps bring the designated cohort into sharper focus. A useful definition of the term can be found in Volunteer Calgary’s 2007 High Skills Volunteer Research Pilot Project, where it is used in reference to people “who hold professional or specialized skills that were developed over their career, and were associated with strategic organizational management.” Applying that understanding to the 2006 census data from Statistics Canada, two additional perspectives emerge. In the first, census data show that there were approximately 4.8 million Canadians aged 45 to 64 (i.e., baby boomers) who possessed

education levels over and above a high school diploma (Statistics Canada, 2006). Census data also show that there were almost 3.4 million Canadians aged 45 to 64 engaged in what could be termed “high skills occupations” in the labour force, including:

- Management occupations
- Business, finance and administrative
- Natural and applied sciences
- Health occupations
- Social science, education, government service and religion
- Art, culture, recreation and sport (Statistics Canada, 2006)

In the absence of a more exact accounting, which falls beyond the scope of this discussion, it therefore can be said with some degree of certainty that there are as many as 5 million Canadians who could be designated as high skills baby boomers.

Given the difficulties inherent in quantifying the cohort, it should come as no surprise that there are even greater challenges in presenting a more comprehensive demographic and psychographic profile of high skills baby boomers. What research there is focuses on the baby boomer cohort at large, not its high skills component. The observations which follow must therefore be qualified by the acknowledgement that in most instances what we have are assumptions; while they may apply to baby boomers overall, the extent to which they can be ascribed to the high skills cohort is a matter for more definitive research.

Baby boomers are a large, influential and incredibly diverse segment of Canadian society. As Volunteer Canada observes, “some still cope with teenagers at home, others pay university tuition fees, some care for aging parents while still others enjoy their grandchildren. Some baby boomers work full-time, some part-time, while others contemplate retirement or are already retired” (Volunteer Canada, 2009, p. 2). For all the differences, there are a number of characteristics commonly attributed to the cohort that lend texture to the statistics.

As a group baby boomers have been described as:

- Healthier than previous generations, with an increased life expectancy
- More educated than their parents
- Accomplished
- Used to having things on their own terms
- Possessing a sense of commitment and wanting to make a difference
- Less invested in the social capital of their communities²
- More affluent than their parents - baby boomers are in their peak earning years - moreover, while consumer spending is usually expected to taper off as people enter their retirement years, economists predict baby boomers are likely to keep spending (Friesen, 2010)
- Possibly wanting to stay involved in the workforce beyond the traditional age of retirement, in some cases balancing paid and volunteer opportunities
- Potentially open to finishing out their careers by switching from the public and private sectors to the nonprofit sector (HR Council, 2010)

Baby boomers are a significant presence in the demographic profile of Canada's labour force. They are becoming an ever-larger part of the Canadian workforce, and their participation rate – the percentage of baby boomers that is either working or actively seeking work – is increasing as well. Currently the cohort comprises approximately 41% of the Canadian workforce; its participation rate is approaching 55% (Statistics Canada, 2006). In addition to above average employment growth (i.e., annual percentage increase of new jobs), labour

force characteristics of baby boomers include increased part-time employment, a growth in self-employment, and a notable increase in the participation rate among women baby boomers (HR Council, 2009c, pp.13-14).

The reasons cited by baby boomers for wanting to stay active in the workforce are as varied as the cohort itself. They include:

- Need for income
- Building social networks and wanting to stay involved with other people
- Providing a sense of purpose
- Putting job skills and life experiences to use
- Providing an opportunity to help improve quality of life
- A chance to learn something and try something totally new

As for what baby boomers are looking for in their late career engagements:

- Flexibility and work/life balance. Baby boomers will gravitate to those opportunities that square with their schedules, values and priorities.
- Meaningful engagement. Baby boomers are attracted to opportunities that will absorb and challenge them.
- Variety. In many instances, particularly those involving volunteering, baby boomers will spread their time across several activities. This concept has been referred to as developing a portfolio of interests.
- In many instances, baby boomers are looking to grow beyond their acknowledged skill sets and learn new things. In others, they seek a “return to the coalface”, going back to the

2. As defined by political scientist Robert Putnam and others, social capital refers to the tapestry of social connections that comprise one of the many levels of interaction that constitute a community. They have identified a constellation of behaviors that serve as proxy indicators for social capital: for example, membership in civic or community organizations, voting behavior, newspaper readership (or watching the news on television), church membership, and volunteering. These behaviors are adopted relatively early in life and don't change substantially with age, making them useful in terms of providing insights into generational cohorts. In terms of baby boomers, the indicators are quite vivid. Comparing them to their parents' generation Putnam suggests: “By every measure of engagement they do less: They vote less. Read newspapers less, are less apt to join churches or civic organizations. This holds, Putnam has found, even for informal indicators of connectedness. The boomers, on the whole, go on fewer picnics and spend less time with their families. In what has become one of Putnam's most famous observations, they go bowling more than their parents did, but they do not join bowling leagues – instead, they bowl alone (Putnam, 2000).” Cited in Gertais, 2004, p. 18.

core interests that launched them on their career paths (e.g., an education administrator returning to teaching.)

- Baby boomers are results-oriented. They look to involve themselves in interests and causes that make a difference. They want to see an observable and measurable return on their investment of time and energy.
- Baby boomers like to be self-directed. They appreciate being handed a project that they can complete with a minimum of managerial oversight.
- Baby boomers want to be acknowledged for their contributions. Status and recognition are important for late career workers. As one key informant opined: “Offering a former vice-president of finance a position titled ‘accountant’ is, frankly, demeaning.” Terms such as “consultant”, “coach”, and “mentor” are considered much more appropriate.

From the preceding discussion it can be inferred that the core premise under consideration – that high skills baby boomers represent a potential source of skilled labour, both paid and unpaid, for the nonprofit sector – is potentially sound. There’s a recognizable sector of the economy facing a growing skills shortage. There’s a pool of prospective workers that could be tapped to meet those labour needs. What issues, then, stand as potential obstacles to taking advantage of the opportunities inherent in the premise?

3 Issues arising

When and how can we start to re-engineer the existing work and retirement structures that prevent more high skills baby boomers from pursuing meaningful engagement in the nonprofit sector?

From a broad, systemic perspective, the challenges inherent in recruiting, integrating and retaining high skills baby boomers in the nonprofit sector stem from the disconnect between the work preferences and needs of the cohort (as described earlier) and an obsolete yet commonly accepted chronology of jobs and retirement. Sociologist Phyllis Moen (2007) refers to the latter as a lockstep convoy of time, which she describes as an institutionalized pattern of expectations and behaviors that starts with full-time education in youth, moves to full-time, continuous employment through middle age, then culminates in a one-way, one-time irreversible exit to full-time leisure (i.e., retirement). Moen goes on to suggest this outdated architecture of time emerges from twentieth-century policies and practices that don't match the realities of the twenty-first century:

an older workforce, a growing educated and healthy retired force, and millions of boomers on the cusp of moving from being workers to being retirees – but wanting something different. Not only do these existing cages and convoys of work time limit family, educational, service, and leisure possibilities, they are also age-graded, building age segregation and discrimination – of all types – into all our institutions. We accept as natural divisions of time dividing (younger and middle-aged) paid workers from (older) unpaid retirees, even if retirees are “working” in community organizations, mentoring in schools on a regular basis, or caring full time for their parents or their grandchildren (p. 32).

Viewed exclusively from this level, the obstacles to realizing the premise of this issues paper are virtually insurmountable. Where and how can we start to re-engineer the existing work and retirement structures that prevent more high skills baby boomers from pursuing meaningful engagement in the nonprofit sector? The answers may lie in scrutinizing the challenges in a more segmented way.

The discussion in the following pages seeks to identify issues arising from the premise of this paper using a hybrid version of a labour market lens. Adapted and modified from the work of the HR Council (2008a) on developing a labour force strategy for the nonprofit sector, the model is predicated on the understanding that the labour market can be defined as the relationships between the supply of people available for employment and the available jobs (p. 1). For the purposes of this analysis, the relationships are understood to involve four distinct yet interrelated sets of interests:

Potential new workers. The high skills baby boomers who are possible recruits to the nonprofit sector, as well as the public and private sector organizations who currently employ them; these individuals will be referred to bridgers or late career sector switchers.

Employers. Organizations that comprise the nonprofit sector.

Existing workers. The current workforce in the nonprofit sector.

Labour market intermediaries. A constellation of brokers, stakeholders and influencers, including governments, post-secondary institutions, career centres, community-based training providers, and organizations whose mandates extend across the entire sector (e.g., Volunteer Canada, Imagine Canada, and the HR Council itself).

The lenses or perspectives of each of these constituencies can be used to identify and cluster the numerous issues arising from the proposition, as a prelude to framing the bigger questions that need to be addressed before the premise can be advanced in a meaningful way.

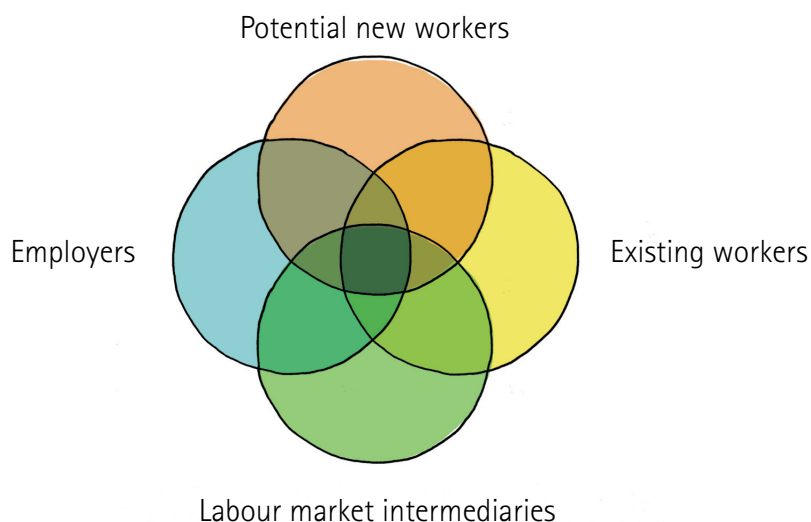
From the perspective of potential new workers

At first glance high skills baby boomers appear ripe for recruitment into the nonprofit workforce. What reasons might they have to think twice about bridging from the private and public spheres into the nonprofit sector?

In response to this query, three considerations come to the forefront: issues of economic security, awareness of opportunities, and preconceived notions about work in the nonprofit sector.

Economic security. For some prospective bridgers, the current state of the economy (the job market in particular) mitigates against considering a sector switch. They feel that in the face of ongoing uncertainty, the safest option is to stay put. Moreover, given the magnitude of retirement savings that have been lost as a result of the financial downturn, some prospective switchers may have reconsidered their retirement strategies, opting not only to stay in the workforce longer, but also to stay in those positions with the most earning potential.

Figure 1



Awareness of opportunities. A recent HR Council survey that explored the factors that might influence individuals to pursue late career or post-retirement paid employment in the nonprofit sector found that two-thirds of survey respondents had never thought of, or considered, a job in the nonprofit sector prior to completing the survey. In addition the survey found that most respondents had a strong interest in seeking a new job or career of some type (in any sector) within the next decade; this prospect is more immediate for those aged 56-65 than for the 46-55 age group. 64% of respondents said they might actively consider a new job or career in the nonprofit sector within the next decade (HR Council, 2010). These findings suggest a need for the nonprofit sector to raise its profile as a late career choice in general.

Pre-conceived notions about work in the nonprofit sector. The above referenced survey also canvassed respondents regarding job characteristics they associated with work in the nonprofit sector. Those characteristics scoring lowest were:

- Opportunity to self-manage
- Recognition for my work
- Ability to influence workplace decisions
- Opportunities for professional development
- Age-sensitive HR policies
- Good physical working conditions
- Good income
- Good benefits
- Job security (HR Council, 2010)³

The significance of these observations has less to do with their accuracy than it does with how pre-conceptions might become red flags for prospective sector switchers.

Those who have transitioned to the nonprofit sector identify a number of challenges in their new environment:

- Nonprofit work hours and compensation
- Operating in an environment with fewer resources
- Dealing with resistance to change
- Working in an environment emphasizing intangible measures of success and performance
- Working with multiple stakeholders
- Less authority to make decisions
- Working in an environment emphasizing consensus decision-making
- Needing to modify long-established management styles
- Dealing with increased public and media scrutiny of nonprofits
- Dealing with suspicions regarding the reasons for sector switching, and doubts about ability to contribute to a mission-driven organization
- Transferring skills/experience from a for-profit or government position to a nonprofit position
- Working with volunteers
- Dealing with perceived notions/stereotypes about age
- Lack of professional development programs, so individuals have to self-manage their career development (Casner-Lotto, 2009 p. 13)

Implicit in each of the aforementioned perceptions is a subset of concerns that require the attention of both employers and labour market intermediaries. How they are addressed will impact significantly on attracting prospective switchers to the nonprofit sector.

Inasmuch as prospective switchers are likely to be currently employed in either the public or private sectors, a question arises as to what the roles and responsibilities of these sectors might be in terms of helping facilitate the transition of their employees to the nonprofit sector. Admittedly,

3. In counterpoint, the characteristics of nonprofit jobs scoring highest included: contributing, working for a cause; challenging, interesting work; work aligned with personal values; a team working environment; flexible working conditions (control over hours/days/location of work etc.); smaller, informal organization; and, good relations with managers/co-workers. (HR Council, 2010).

this is a complicated proposition for governments and private sector companies. In the last decade, employers in the public and private sectors have become increasingly concerned about the impact baby boomer retirement will have on their own workplaces. The retirement of this cohort will bear little resemblance to that of previous generations; many will ease into retirement from their current employment while simultaneously engaging in new opportunities (e.g., volunteer work, different work, travel, etc.). In recognition of these preferences, public and private sector employers have been introducing a wider range of work options for older workers. These have been developed to address the following issues:

- a) A potential mass exodus of skills and experience would severely impact the ability of companies and governments to function effectively;
- b) The loss of tacit knowledge cannot be captured through technologically-driven knowledge management systems; it requires direct transfer from employee to employee;
- c) Corporate social responsibility initiatives⁴ are increasingly becoming “need to have” rather than “nice to have” for employers seeking to attract both younger (cause-driven) workers as well as older workers seeking to make a meaningful contribution to society.

Some employers have begun to provide flexible phased retirement options in which the employer and employee agree to a gradual transitioning from fulltime work to fulltime retirement over a set number of years. They are also developing new roles that acknowledge pre-retirement employees’ skills and experience. Employees are given the opportunity to become coaches, mentors and trainers. Rather than spending a few weeks handing over the reins of their job to incoming employees, the transition occurs over the course of a year or longer.

This bridging between working and retirement enables employees to balance time between their current employers and other activities. It also allows employers to ensure the incoming workforce receives appropriate training and support to ensure a smooth transition during staff turnover

Creative ideas emerging through this “supported transitioning” have the potential for positive impact on the nonprofit sector. For example, some companies are connecting executives/senior management to meaningful volunteer experiences while they are still part of the (public and private sector) workforce. Ideally, companies are looking to place senior people on boards or committees in organizations that can benefit from their skills and whose mandates match the employees’ passion and the company’s corporate social responsibility strategy. The goal is to build capacity and leadership in the nonprofit sector; this outcome, in turn, is understood to benefit the broader community. The hope is that as these individuals approach retirement they are likely to continue/increase their involvement with the organizations and/or seek to engage with other nonprofits. This is an active strategy for a handful of Canadian companies.

The challenge: how can we ensure these and other innovative approaches to transitioning high skills baby boomers from the public and private sectors to the nonprofit sector become the norm, rather than the exception to the rule, and that prospective late career sector switchers are able to take advantage of these opportunities?

From the perspective of employers

A 2007 Conference Board report in the U.S. was titled *Boomers are Ready for Nonprofits, But are Nonprofits Ready for Them?* The same report cited a survey from the National Council on Aging that found, among other things, that many nonprofits are:

4. Corporate Social Responsibility, or CSR, is used here in its broadest sense, and entails “the continuing commitment by business to behave ethically and contribute to economic development while improving the quality of life of the workforce and their families as well as of the local community and society at large.” Cited in Holme and Watts, 2000.

...ill-equipped and uninterested in improving their organization's capacity to attract and retain older adults into more professional roles, either as volunteers or employees. About one-third of respondents said their organizations would be unprepared to improve their engagement of older adults and generally viewed them in more traditional volunteering roles as service providers rather than in professional or strategic leadership roles. The report concludes that the business case for attracting experienced older adults into new roles that match their skills is not evident to local and national leaders (p. 14)

Key informants for this issues paper suggest these findings apply to Canadian nonprofits as well as their American counterparts. While employers may acknowledge the demographic reality of an aging population and its potential negative impact on their organizations (e.g., loss of skilled and experienced workers from the sector combined with increased demand on sector services) they are not, by and large, considering the potential advantages that may be concurrently presented by the cohort of high skills baby boomers or late career sector switchers. Given what we know about the cohort (i.e., skills, experience and desire for meaningful engagement) and the needs of the sector (i.e., skilled workers) a question arises as to why this is the case. What obstacles face employers who may benefit from engaging the high skills baby boomer cohort, and why do these barriers exist?

Primary and secondary research suggests employers in the nonprofit sector, in general, are:

- Often unaware of the cohort as a potential source of highly skilled, experienced and willing workers
- Often unclear about the organization's needs and therefore unaware of how the skills and experience of late career sector switchers could address their specific human resource requirements
- Concerned the challenges posed in integrating the cohort into the existing workforce may outweigh the benefits

- Considering engaging the cohort for the wrong reasons. This can mean either regarding them as potential sources of "cheap" (i.e., volunteer) labour and therefore a means to address immediate, short-term problems or as potential cash cows to be tapped for donations.

Each of these issues is symptomatic of a much deeper malaise affecting organizations in the sector: the lack of organizational readiness to address issues and take advantage of opportunities in a strategic and structured way. A number of factors contribute to this lack of readiness. Highest among them are the cultural, operational and structural concerns that exist in many organizations in the sector.

Cultural factors

Cultural factors refer to the attitudes, experiences, beliefs, and values that operate within an organization. Held by the majority of people and transferred over time to ensuing generations of its workforce, these markers represent an organization's culture. Culture determines people's behavior, as well as how an organization approaches its work. The type of cultural barriers employers face in engaging baby boomers include:

Misconceptions, fueled by ageism, about late career sector switchers:

Knowledge gap. Employers believe the cohort is unable to quickly grasp and apply emerging technology in a way that is second nature to Generation X and Y.

Cost/benefit of training. There is a concern that the time and effort required to train a late career sector switcher for work in an organization will not be recouped because they will be more likely than other employees to take extended vacations, to choose to work part-time or to leave.

Cognitive fit. Older workers are perceived as being too set in their ways and too old to learn to do things differently.

Organizational values and workplace practices which differ from the public and private sectors:

Values clash. In addition to the requirement for organizational “fit” related to skills there is also a need for “fit” with respect to values. Nonprofits (and generally the people working for them) are mission-driven and focused on work that connects to their values. Employers see challenges in integrating people with a different orientation to work (e.g. bottom-line, revenue driven) into the existing workforce.

The challenges of an intergenerational workforce. These are not unique to the sector; however, with the average age of sector employees slightly higher than that of the overall labour force (HR Council, 2008b, p. 3) nonprofits have been particularly sensitive to the need to hire younger workers and have not been focused on the older cohort (other than their recognition of the need to retain older workers to enable skills and tacit organizational knowledge transfer from older to younger workers). Employers are engaged in determining how to manage the intergenerational workforce, how to support skills and knowledge transfer and how to retain high-performance older employees. Consideration of late career sector switchers is not a priority.

A dynamic tension exists between paid and unpaid (volunteer) labour and is likely to intensify as more employers look to blended workplaces to creatively address human resource requirements. Existing employees may be concerned volunteer labour increasingly will replace paid work in the sector, particularly if nonprofit employers don’t take a strategic approach to integrating paid and unpaid workers.

Operational and structural factors

In addition to cultural factors, employers face operational and structural issues which impact their ability to engage late career sector switchers; these include how nonprofit entities are organized and the systems and processes they have in place to

direct and manage their work.

There are three predominant areas of focus that set the stage for the discussion of the barriers preventing nonprofit employers from engaging the cohort into their organizations:

- Outdated operational models
- Absence of strategic workforce planning supported at the board level
- The unstable financial situations many organizations are in (exacerbated by the recent economic downturn)

Operational models. An overarching issue identified by key informants is that many, if not most, nonprofits continue to rely on outdated operational models to run their organizations. The observation was made that while the private and public (at a somewhat slower pace) sectors had models which had evolved to meet the changing needs of customers and to take into the account the changes occurring in society (including demographic, cultural, technological and other shifts), the nonprofit sector largely has continued using the original models in existence at the time individual organizations were founded. The models focus on a small staff contingent or a volunteer-driven workforce charged with executing the work of the organization shored up by (additional) volunteers who, other than board or committees members, are involved in low-skilled and often repetitive work.

The number of paid staff is relatively low compared to similarly sized organizations in the private sector. With paid employees, in most nonprofit organizations, responsible for both strategy and implementation the former is the first to go when time constraints force a choice. Very few organizations have volunteer managers or human resources managers; these functions are often a subset of someone else’s (i.e. usually the Executive Director’s) job. These positions, when they do exist, are often filled by junior staff in part because the salaries available preclude hiring senior managers and in part because these roles are not regarded as strategic.

5. Note: The work plans which evolve from the strategic and workforce plans would also incorporate technological and other potential solutions.

Workforce planning. The existing operational models are characterized by an absence of high-level (strategic) workforce planning. While boards understand the value of strategic planning (which identifies means of moving organizations toward fulfilling their missions) and budget planning (which allocates financial resources), there appears to be a lack of awareness at the governance level of the need for the development of complementary workforce plans to identify and allocate the human resources required to support success.

Strategic workforce planning is linked to an organization's strategic or business plan. It refers to the practice of identifying the work that needs to be accomplished in order to achieve an organization's mission and then allocating human resources to carry out that work. Most organizations in the sector do not have strategic workforce plans. Those that do will generally allocate existing human resources and perhaps some additional contracted support to accomplish the goals and objectives identified in the plan; some may engage volunteers to assist in specific elements such as fundraising; some may adjust the plan to fit the existing human resources. A strategic workforce plan would look at the best way of achieving what needs to be accomplished and determine the optimum combination of human resources. In the nonprofit sector the likely result would be a blend of paid, unpaid, part-time, full-time and contract workers.⁵ Kelly and Brown (2010) provide an overview of a successful blended workforce model that is in place at Vantage Point (formerly Volunteer Vancouver).

Job design issues along with those related to recruitment, retention, succession planning and employee performance arise out of this lack of workforce planning.

- *Job design*

The nonprofit sector is characterized by inadequate and outdated job design that doesn't reflect the real skills and experiences now required in organizations. While strategic plans evolve over time, job design changes much less frequently, resulting in recruitment for jobs that no longer meet the needs of the organization. Until nonprofit employers are able to accurately

quantify what they need (i.e. the combination of skills and experience) to support implementation of strategic plans and design work to reflect this, the issue of job design will remain.

- *Matching skills acquired in other sectors to those required in the nonprofit sector.*

This issue is related to job design. Key informant interviews indicate an ongoing issue related to getting the right "fit" or match between prospective recruits and available positions and opportunities. Many jobs are defined differently in the different sectors so there is no systematic way to match competencies possessed by individuals in the public and private sectors with available opportunities in the nonprofit sector. Individuals are often recruited "under their heads" or "over their head"; for jobs that are beneath or above their ability. (This is true of both paid and unpaid workers).

- *Non strategic recruitment processes for both paid and unpaid workers*

The absence of strategic recruitment processes is directly related to the lack of workforce planning. In addition to the challenges already noted, current volunteer recruitment practice is based on putting people into existing volunteer roles rather than recruiting volunteers to support workforce needs. In fact, there is an overall tendency for employers to regard volunteers as a source of either very low skilled, long-term workers (e.g., envelop stuffing and equivalent) or as very specialized, higher skilled, short term workers (e.g. fundraising events). Key informants indicated that while late career sector switchers may carry out the low skill volunteer opportunities offered to them once or twice they are unlikely to remain with an organization that undervalues them. The work provided must be engaging, challenging and rewarding.

Employee recruitment follows a similar practice. It focuses on filling the vacant position rather than determining the work that is required, identifying the skill set needed and then hiring to meet the stated need. This often results in underemployment

6. See Vancouver Foundation, 2009. This study looks at the impact of the recent economic downturn on the nonprofit sector in BC.

of skilled people who could be helping to support organizations at the level of their mission; and, hiring the wrong people.

- *Lack of retention strategies and succession planning.* Once employees have been hired most organizations have few or inadequate retention programs. In addition to managing ongoing staff turnover they are now faced with the loss of high skills baby boomers. These individuals are usually operating at a senior manager level, have been with the organization for a number of years and possess valuable skills and organizational knowledge. As they approach retirement, many are experiencing burnout as a result of operational and structural issues such as:
 - The large amount of time spent on functions like fundraising and human resources management
 - Difficult board and funder relations
 - More complex and rigorous regulatory and accountability requirements

There is a concern that there will be a wave of retirements within this group of employees. Coupled with a lack of succession planning (i.e., strategic leadership transitioning), this could have a devastating impact on already stretched sector capacity. These factors, as well as other immediate concerns such as the need for competitive compensation and benefits and greater work/life balance are not being addressed by most organizations or by the sector and will remain issues for existing workers and for new employees being recruited into organizations.

- *Absence of strategies to retrain or replace low performance employees.* An additional difficulty for the employer arises out of the desire to retain high performance workers (at all levels; entry, mid and senior) and to transition lower performance workers (i.e., through termination, firing, retraining) into other options. Many organizations do not have access to or do not have the confidence to implement HR protocols and processes that would support them in addressing these issues.

Integrating a new, “unknown” cohort into an organization that is struggling with all these issues becomes difficult to imagine, let alone implement.

Financial Models. As a result of the unstable nature of most organizations’ funding, sector employers continue to be focused on financial issues, at times to the detriment of other equally important considerations. This is not to downplay the ongoing challenges employers are facing;⁶ of particular note is the fundamental change in the nature of the relationship between organizations and their principal (in a majority of instances) funders: the federal and provincial governments. In the last 10 years, there has been a move away from direct provision of core funding, combined with the introduction of private sector values (e.g., competition, diversification, entrepreneurialism, innovation, focus on the bottom line, etc.) all of which have had a major impact on the ability of nonprofit organizations to deliver on their mandates (Scott, 2003).

The combination of focusing on funding and managing immediate crises has kept the leadership of nonprofit organizations from taking a more holistic approach to HR management. Employers are so caught up in the tyranny of the immediate that high skills baby boomers are not on their radar screens; certainly, not as a pool of prospective skilled labour. Very few Executive Directors and Boards make time to take a high-level perspective on their organizations that would enable a more considered approach to all planning (i.e. strategic, human resources, financial). As noted, the ongoing stress of dealing with operational crises has an impact on the retention of existing employees and would also be a factor for both attracting and retaining late career sector switchers.⁷

The amalgam of outdated operational models, the “pathological” focus on financial issues and the absence of workforce planning have created a situation in which the business case for engaging the high skills baby boomer cohort is not readily apparent. It is impossible for an organization to craft a value proposition about itself to position the opportunity for engagement when so much is in flux.

7. See preceding section.

From the perspective of existing workers

While nonprofit organizations and their existing workers are often spoken of in the same breath, for the purposes of this analysis it's helpful to separate the two, if only to ask the question: how will the arrival of late career sector switchers be greeted by the current nonprofit workforce? This formulation focuses the spotlight on additional issues of integration that stem from the core premise.

Because large scale sector switching hasn't occurred, there's not much in the way of research into the integration of high skills baby boomers into the nonprofit sector. What's known is that organizations in the sector are characterized by what one key informant describes as precarious employment: many part-time, low wage positions with minimal or no benefits. Unions and associations representing employees in so-called social service sector jobs, which include nonprofit employees, have been working to address the insecure nature of work in these settings. They have made inroads with public and private sector employers who have created more full-time jobs with better benefits and their efforts continue with employers in the nonprofit sector.

Couple the uncertainty of precarious employment with the unknown impact of new arrivals, and it's not a stretch to suggest that the prospect of late career sector switchers arriving in their workplaces would be met with concern and trepidation on the part of existing workers. These fears may include:

The potential for job loss. Baby boomers could be perceived as having more skills and being able to work faster and better than existing employees. They have significant experience operating at the strategic level and are well connected to government/business through their previous employment. They have had hands-on experience in the public and private sectors – sectors nonprofit organizations seek to engage for funding and support – and they'll bring the benefits of this knowledge to the roles they undertake in the nonprofit sector.

Many individuals hired into the nonprofit sector

were selected because they were “doers”: able to work hard, for long hours and get the job done. They were not hired to be strategists yet, over time, as they have risen to more senior positions they have been expected to become strategic. Some have succeeded; others have not, but nevertheless have been placed at the helm of organizations. The arrival of late career sector switchers could represent a threat to these existing workers.

Uncertainty regarding the impact an influx of high skills baby boomers will have on sector salaries and benefits. Many late career sector switchers are choosing the nonprofit sector not because they need to work but because they are interested in new challenges and an opportunity to work for causes that are meaningful to them. These individuals may have full or partial pensions. They may be willing to work for lower salaries or as volunteers, potentially eroding the salary scales in the sector. Alternately, given their historical interest in social justice, baby boomers could take issue with the precarious employment in the sector and advocate for improved wages and benefits. Some kind of change appears inevitable; whether it will be to the benefit or detriment of existing workers remains to be seen.

Fear of an intractable culture clash between existing employees and “interlopers” from other sectors. Research suggests that individuals choose paid work in nonprofit organizations because they have an interest in employment which benefits society; work that is mission-driven. Current employees are unsure as to why baby boomers from the public and private sectors would now choose to work in “their” sector. Public and private sector employees are often regarded as espousing different values; in particular, the distinction between private and nonprofit sector values has been short-handed as being the difference between a bottom-line and a people-focused orientation.

Disappearance of promotion opportunities. People already in the sector may believe they will be bypassed for promotion as employers seek to recruit late career sector switchers. Employees anticipating this shift could begin looking for employment

elsewhere to “get a jump on the situation.” Ironically, this could lead to the loss of the types of skills and expertise that nonprofit employers are seeking to increase through the engagement of high skills baby boomers.

Jobs in the sector could change from being focused on executing work to supervising work carried out by a blended workforce of paid and unpaid employees. The issue of volunteer/staff relations is a hot topic in many nonprofit workplaces, and will become even more so as the concept of blended workplaces gets more traction. Given this type of model, the nature of paid work in nonprofit organizations could change dramatically, either displacing existing workers or requiring people who have been employed for decades to learn new skills in order to remain in their jobs. Employment in the nonprofit sector could become increasingly about managing a blended workforce and dealing with the different challenges this model brings in terms of employer and employee expectations.

In addition to the fears outlined above, there are a number of misconceptions/prejudices about older workers that may be held by existing employees. They all relate to ageism, and while not exclusive to current workers in nonprofit organizations, they are not without consequence. The issues of ageism are similar to those articulated previously for organizations, but with a slightly different focus:

- Knowledge gap – incoming late career sector switchers will require support as they struggle to learn technology systems. There may be an expectation that existing workers will have to support the new recruits (e.g., assuming their responsibilities when deadlines must be met)
- Training requirements – existing employees will have to provide or support training for late career sector switchers
- Cognitive fit – older workers will be unwilling or unable to learn how to learn organizational processes and systems and will instead seek to impose the ones they know from the public and private sectors onto nonprofit organizations

- In the final analysis, existing workers may believe the recruitment of late career sector switchers is sure to result in additional duties being added to already heavy workloads.

From the perspective of labour market intermediaries

As noted previously, the nonprofit sector is characterized by small organizations with few formal cross-organizational linkages, delivering a wide range of programming and representing a variety of occupations. This absence of homogeneity makes it extremely difficult to define the sector. It may also be that this incredible diversity is the source of a number of issues that stand in the way of late career sector switchers bridging into nonprofits

Through the variegated lens of labour market intermediaries, the challenges inherent in developing inter- as well as intra-sectoral strategies to engage late career sector switchers in nonprofit organizations become more readily apparent. They include:

- *Outdated legislative frameworks, elements of which discourage the participation of older workers in the labour market generally, and the nonprofit sector labour market specifically.*
A number of aspects of the public pension system, as well as other aspects of the social security and tax systems, act as disincentives for older workers, discouraging them from continuing work and pursuing opportunities for flexibility and phased retirement. Current disincentives include:
 - Mandatory retirement provisions in federal jurisdictions
 - Lack of pension plan portability
 - No recognition of contributions of volunteer labour by the tax system
 - The work cessation clause in the Canada Pension Plan (CPP)
 - Disallowing CPP contributions to employment earnings once an individual begins to receive a CPP retirement pension

- Clawback provisions of the Guaranteed Income Supplement. (Expert Panel on Older Workers, 2008, pp. 45-56)

Federal, provincial and territorial governments need to undertake and implement program and policy changes that enhance their inclusiveness, give individuals more choice and flexibility in balancing work and retirement, and increase older workers' labour market participation.

- *HR capacity within the sector varies across organizations.*

While most nonprofits employ a small number of employees, employment in the sector is concentrated among a small number of larger organizations. When opportunities such as the possibility of recruiting high skills baby boomers from other sectors present themselves, it is often these bigger, better-resourced organizations that are able to take advantage of them. Might this contribute to a kind of organizational natural selection, where the proverbial “rich” get richer while the “poor” get poorer and potentially disappear? A sector-wide approach to determine how the playing field might be leveled to facilitate the recruitment of late career sector switchers by all interested organizations, regardless of their size or HR capacity, may be desirable.

- *Sectoral identity crisis.*

The nonprofit sector is well known but not known well. Most Canadians have some connection with organizations in the sector (e.g., children's sports organizations, community groups, etc.); however, very few individuals as a percentage of the population could define the sector and explain why so diverse a group of organizations constitute one sector of the labour market. Those not operating in the sector have misconceptions about what it is, what it does and why it matters. The diversity which enables organizations in the sector to be involved in supporting all facets of Canadian society also make it difficult to forge a sectoral identity, message or position not only to external audiences but also internally to its own employers and employees.

The dilemma is further amplified by the fact that the sector defines itself in terms of what it doesn't do – it is the nonprofit sector – as opposed to what it does.

- *The sector is not yet fully engaged by the opportunities (and challenges) presented by late career sector switchers.*

Until the issues and opportunities are understood across organizations in the sector and an effort has been made to develop a sector-wide strategy it will not be possible to develop a comprehensive business case to position the value proposition to high skills baby boomers for becoming involved in the sector. It also will not be possible for organizations to develop the individual value propositions (derived from the umbrella positioning) related to their own agencies.

- *Lack of sustained cross-sectoral dialogue regarding the nonprofit sector's labour market needs.*

Cross-sectoral cooperation at the local, regional and national levels is essential to successfully address opportunities of this magnitude. The impact of high skills baby boomer retirement is being felt across all sectors yet there has not been a concerted effort to bring the sectors together to begin to address the inter-sectoral possibilities of this opportunity. This kind of dialogue could potentially contribute to a fundamental reshaping of the sector itself, similar in impact to the kind of operational restructuring at the organizational level suggested earlier (see section 3.2 above). Cross-sectoral communication could also open discussions around other issues facing the nonprofit sector such as the growing concern organizations have with regard to the effort they are putting into hiring and training employees who are hired away by public and private sector employers offering better salary and benefits.

- *There remain significant knowledge gaps regarding prospective late career sector switchers and how they can be recruited and integrated into nonprofit organizations.*

The preceding discussion in Section 2 illustrates some of the challenges inherent in quantifying

and describing the high skills baby boomer cohort. Census and labour market data provide a partial picture but there's little in the way of psychographic information specific to the cohort. While inferences are possible, we can't make definitive pronouncements as to who they are, where they are, what they want and what they are likely to do. Another knowledge gap pertains to the recent recession and its impact on both high skills baby boomers and organizations in the nonprofit sector. An ongoing program of research into key issues by a network of post-secondary institutions and research-focused organizations would enable the sector to: 1) better define prospective late career sector switchers; 2) confirm their needs and intentions re. the labour market; 3) track and analyze their movements (e.g. follow bridgers who are moving from public and private sector employment to work in the nonprofit sector); and, 4) proactively plan for their meaningful engagement in the sector.

4 Strategic questions

Upon synthesizing and distilling the preceding research, at least six clusters of questions emerge that could frame a constructive dialogue aimed at advancing the premise that high skills baby boomers represent a potential supply of labour, both paid and unpaid, for the nonprofit sector. They include:

1. How can high skills baby boomers be assisted in making informed decisions about bridging into the nonprofit sector? What outreach measures would help prospective late career sector switchers become aware of the opportunities and be enticed into making the transition to the nonprofit sector? How could such measures be implemented?
2. What does the effective integration of the high skills baby boomers into nonprofit workplaces look like? How can environments be created where this can be achieved? Can this be done so that organizations and people win and no one loses?
3. How can we encourage nonprofits to recalibrate their organizational mindsets and start thinking differently about their workforce strategies? Is it a question of a compelling business case? A burning platform? Incentives?
4. Some key informants have advocated the need for structural change in the nonprofit sector, arguing that meaningful progress on the premise is impossible without re-tooling the model of nonprofit organizations. What needs to change? What would a re-engineered organizational model look like? What are its component parts and assumptions? How can these new models be brought into reality?
5. What kinds of shifts in thinking need to occur among other parties with a vested interest in this proposition? For example, among high skills boomers themselves? At the sectoral level? Among unions? At the cross-sectoral level? Among governments?
6. Regarding the meaningful engagement of late career workers, what are the best practices in the sector, in other sectors, and in other jurisdictions? How can we build on these activities and adapt them more broadly among and across organizations in the nonprofit sector?

5

Stakeholder consultation and recommendations

In Phase Two of this project, the HR Council hosted a daylong consultation at the Lord Elgin Hotel in Ottawa on March 23, 2010. The purpose of the session was to solicit the feedback and input of key informants regarding the questions and concerns raised in Sections 3 and 4 of this document, as a prelude to evolving workable strategies for action. Participants in the consultation included:

- Hilary Amit – HR Council Board of Directors
- Laurel Benson – Volunteer Calgary
- Susan Carter
- Eldon Emerson – Muttart Foundation/HR Council Board of Directors
- Charles Feaver – youngretired.ca
- Michelle Gauthier – Imagine Canada
- Maureen Kellerman – HR Council Staff
- Colleen Kelly – Vantage Point
- Don Lapierre – Volunteer Canada
- Bruce MacDonald – Big Brothers Big Sisters of Canada
- Ruth Mackenzie – Volunteer Canada
- Amanuel Melles – United Way
- Simone Powell – Public Health Agency
- Liz Rootham – HRSDC
- Liz Sauter
- Susan Tolton – HRSDC
- Lynne Toupin – HR Council Staff
- Leslie Wright – Novita Enterprises
- Marnie Ziegler – Elizabeth Fry Society

Gayle Farrell and Bohdan Zajcew of Siena Consulting facilitated the consultation.

The day's proceedings began with a situational analysis that highlighted findings from Section 3 in this document. Participants then worked through a macro-environmental analysis, reflecting on the political, economic, socio-cultural and technological factors, trends and currents with a potential to influence the underlying hypothesis of the project. This was followed by a review of the six strategic questions identified in Section 4. During this conversation a seventh question was identified by participants as worthy of consideration:

How can nonprofits who are interested in this opportunity locate later career sector switchers? Where can they go to make their pitch?

These questions above framed the breakout discussions undertaken by smaller groups made up of between four and six participants each, meeting in two rounds of 45-minute sessions. The plenary reconvened after each breakout round, during which time the groups reported out on the substance of their discussions. After the second round of reporting, the plenary reconvened for a larger group discussion directed at evolving workable strategies. The conversation in this session was framed by three sets of questions:

1. What questions are we not asking ourselves about engaging high skills baby boomers in the nonprofit sector? What's missing from this picture so far? What is it we're not seeing? What do we need clarity about? What's the next level of thinking we need to do?
2. What needs our immediate attention going forward?
3. If our success was completely guaranteed, what bold steps might we choose?

A vigorous 90-minute discussion ensued, resulting in the generation of a host of ideas and suggestions.

Upon the conclusion of the consultation, Phase Three of the project was launched. The facilitators reviewed the Phase One research, the reports from the breakout and plenary sessions of the Phase Two consultation, and identified the major themes, ideas and recommendations. After further discussion, synthesis and distillation, six final recommendations emerged. They are:

1 In order to encourage the meaningful engagement of older workers in the labour market generally, and the nonprofit labour market specifically, it is recommended that a cross-sectoral forum of representatives from the private, public and nonprofit sectors, as well as organized labour, be convened to begin addressing issues of career transitions (e.g., where to go to recruit late career sector switchers; strategies for successful recruitment; common obstacles to recruitment and how to overcome them; how to prepare organizations for seamless integration of new workers; effective bridging strategies; etc.) and skills transferability (e.g., strategic workforce planning in the nonprofit sector, including current and future skills requirements and innovative job design; matching skills acquired in other sectors to those required in the nonprofit sector; training requirements and cognitive fit; succession planning and retention of organizational knowledge; etc.)

2 In order to build stronger relations between organizations in the nonprofit sector and to encourage dialogue between them, it is recommended that a virtual, sector-wide "hub" be created to function as a centralized, easily accessible source of information and advice regarding labour force and other relevant issues. Building out and housing this hub on the existing HR Council website would be a logical starting point for such an initiative.

3 In order to advance best practices and innovative thinking regarding the engagement of older workers in the nonprofit sector, it is recommended that two or three prototype workforce initiatives be implemented, tracked and reported on over the next 24-36 months. A labour market intermediary with resident capacity in terms of knowledge and

resources would lead each initiative. The intermediary would work with two or more nonprofit organizations to test promising workforce strategies. Examples of the latter might include: trials of integrated workforce models such as that developed by Vancouver's Vantage Point, featuring unique combinations of volunteers and paid staff working side by side; adaptations of the Finnish model of "Work Ability" (where the focus on the connection between employees' health and their jobs has led to improved retention of aging workers); "bridging" to retirement and other job redesign initiatives; and, other creative strategies to support and facilitate cross-sector transitions.

4 In order to encourage and facilitate cross-sector transitions of older workers, it is recommended that a series of toolkits and workshops be created for nonprofits, prospective sector switchers and other interested parties, to assist with the recruitment, integration and retention of late career sector switchers in nonprofit workplaces. Toolkits, workshop details and schedules could be located in the virtual "hub."

5 In order for prospective switchers and public and private sector employers to understand the value of work in the nonprofit sector, it is recommended that a series of marketing initiatives be undertaken to bring the opportunities available in the sector to the attention of the targeted parties. A parallel marketing push would see the opportunities represented by older workers positioned with nonprofit organizations.

6 In order to encourage evidence-based decision-making in the nonprofit sector with regards to the engagement of older workers, it is recommended that a series of research initiatives be undertaken to address the knowledge gaps identified in the preceding phases of this project. The latter might include: composing a more comprehensive and textured profile of the target cohort (particularly in terms of Canadian-based psychographic data); researching the impact of the recent economic recession on prospective late career sector switchers and on nonprofit organizations themselves; and, conducting longitudinal studies tracking bridgers as they move from the public and private sectors to work in the nonprofit sector.

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