



Boomer Bridging:

Tapping into the Talents of Late Career Employees

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

There is growing concern about the labour force challenges facing the [nonprofit] sector. There are more signs that organizations are less and less able to recruit the talent they need in today's tightening labour market.

Source:
Toward a Labour Force
Strategy for Canada's
Voluntary & Non-profit
Sector, Report 1

There is much discussion and speculation in all sectors – public, private as well as nonprofit – about the large number of baby boomers¹ approaching retirement age: What happens when an unprecedented number of people exit the labour force? Will there be a shortage of skilled workers and, possibly, a leadership gap? What will retirement look like for baby boomers? Where will they invest their time and talents?

While these are vital questions for all sectors, they are particularly important to the nearly 69,000 nonprofit organizations with paid staff in Canada. That's because nonprofit sector employers already face significant challenges in recruiting skilled employees.

In 2008 the HR Council for the Nonprofit Sector (HR Council) conducted a major study of the human resource needs of the sector. The Canada-wide survey of nonprofit sector employers found that:

- Nearly half (47.1%) of employers that reported recruitment activity (in the previous 12 months) said that it was either "difficult" or "very difficult" for their organization to find qualified people.
- In Health & Social Services, the percentage of employers reporting difficulty recruiting qualified paid staff was the highest at 54.8%.
- Large organizations (those with 100+ employees) reported greater difficulties (60.5%) compared to medium-sized organizations of 11-99 employees (54.1%) and small organizations of 1-10 employees (42.7%).
- In terms of recruiting professionals, about a quarter of all organizations reported difficulty recruiting qualified paid staff.

Other research in the nonprofit sector portrays the same picture. In 2007, Imagine Canada conducted a study of 32 organizational leaders from all areas of the nonprofit sector in Canada; 70% identified finding skilled staff to be their biggest challenge (Zarinpoush & Hall). Provincial consultations with nonprofit organizations conducted over the past few years have also identified concerns about shortages of skilled staff.²

1. There are different definitions but generally, a baby boomer is someone born during the demographic birth boom between 1946 and 1964. In Canada, Human Resources and Skills Development Canada (HRDSC) reports that there are approximately 10 million Canadians in the baby boomer demographic (Note: HRDSC defines baby boomer as someone born between 1946 and 1966). It is important to remember that it is difficult to make generalizations about an age demographic that spans almost 20 years.

2. See, for example, reports from: the Government Non-profit Initiative in B.C. and the Federation of Community Social Services of B.C.; the Government of Alberta; and the Comité sectoriel de main-d'oeuvre Économie sociale et Action communautaire in Quebec.

In 2007, Toupin and Plewes explored the looming leadership transitions in the nonprofit sector. They pointed out the particular vulnerability of the sector at the leadership level. Not only are the vast majority of nonprofit leaders from the baby boomer generation but the flat organizational structures of so many nonprofit organizations means there are often few middle management positions – a common source of future senior managers. As well, many mid-manager level employees are also baby boomers and approaching retirement age themselves.

There is certainly concern in the sector about the tight labour market and competition for skilled employees as well as the upcoming loss of organizational knowledge and skilled leadership with the retirement of baby boomers. However, some also see a strategic opportunity: the retirement of baby boomers from other sectors is a potential pool of new, highly skilled employees for nonprofits.

U.S. experience

In the United States, there is already significant interest in understanding and supporting late career/post-retirement career shifts into the nonprofit and public sectors. A 2005 study by the MetLife Foundation / Civic Ventures, entitled the *New Face of Work Survey*, uncovered widespread interest in what has since come to be referred to as the “encore career”³ – or the pursuit of purpose-driven work in the second half of life. The follow-up survey, the 2008 *MetLife Foundation / Civic Ventures Encore Career Survey*, was the first national (U.S.) survey that provided evidence that the encore career is more than just an appealing idea. In fact, surprisingly large numbers of U.S. baby boomers are seeking out work that combines income with personal meaning and social impact, and half of those aged 44 to 70, who are not yet in encore careers, want to be. More than half of those in encore careers (55%) and two-thirds of people interested in encore careers (64%) say they are motivated by a desire to use their skills and experience to help others. The majority of encore employees are between the age of

51 and 62, are more likely to be female, and mostly come from professional and managerial careers.

The MetLife Foundation / Civic Ventures research considered both the supply side of the labour market equation (i.e. baby boomers) and the demand side (i.e. nonprofit sector employers). Their survey of nonprofit employers (2008) found that interest in encore workers is fueled by growing concerns about finding talented staff and managing skilled labour shortages. Most nonprofits have employed encore workers in the recent past and see the benefits. Nonprofits have concerns about the encore workforce, but no more than one in four identifies any of the concerns as “serious.”

The American Conference Board explored the impact of baby-boomer retirements on the nonprofit sector in two reports. The first, *Boomers Are Ready for Nonprofits, But Are Nonprofits Ready for Them?*, concluded that there are unprecedented opportunities for nonprofits that are able to tap into the talents of boomers who retire from the public and private sectors. However, the report identified significant challenges including a dearth of flexible work options, employers’ limited recruitment networks, and a lack of pathways into the sector for older workers (Casner-Lotto, 2007).

A follow-up report, entitled *A Perfect Match?: How Nonprofits Are Tapping into the Boomer Talent Pool*, reported on case study and survey research with nonprofit employers, “sector switchers” (who were age 50+ and had transitioned to a nonprofit job) as well as job seekers (also age 50+ and interested in transitioning to nonprofit positions). The report provides detailed advice to nonprofit employers and prospective employees. While transitions posed challenges for employers and new employees, the report concluded that employees found work that was personally fulfilling and brought critical functional expertise and business skills to their new employers (Casner-Lotto, 2009).

Research conducted by The Bridgespan Group (2009) to assess the potential for bridging talent from for-profit to nonprofit leadership roles found that 53% of nonprofits surveyed have significant

3. It is important to note that the definition of an encore worker is significantly beyond the scope of the HR Council’s research project as it includes transitions into the public sector (in addition to the nonprofit sector).

for-profit management experience represented on their senior management teams; additionally, 42% of executive directors surveyed had significant management experience in the private sector. Specific functional experience is highly rated in hiring employees, however “cultural fit” is equally valued.

What is noteworthy in the United States is the number of intermediary organizations that are in place to support employee transitions to the nonprofit sector. Some of these organizations have mandates to support “encore careers” in general – including many American community colleges as well as Civic Ventures, the American nonprofit

think tank focused on creating pathways to encore careers. Other organizations actively recruit and provide support for individuals who want to transition their for-profit professional experience to the nonprofit sector and also act as placement agencies for nonprofit organizations (for instance, the Bridgespan Group). These intermediary organizations also provide opportunities for employers, prospective employees and those who have made the transition to share effective practices about late career transitions into the nonprofit sector (see for example www.bridgestar.org and www.encore.org).

About the Tapping into the Talents of Late Career Employees project

The HR Council initiated the Tapping into the Talents of Late Career Employees project to investigate, within the Canadian context, the potential for late career/post-retirement recruitment from other sectors to the nonprofit sector. This research project explored factors that might influence professional and managerial employees in the public and private sectors to pursue late career or post-retirement paid employment within the nonprofit sector. The Project's two main activities included:

1. A literature review that examined labour force participation of older employees (including post-retirement employment); employment preferences of late career and post-retirement individuals; retirement trends, plans and preferences; and, career development of older employees, including transitions to the nonprofit sector.
2. A survey of 5,300 public and private sector employees aged 45+ and retired persons to assess their potential interest in transitioning to full-time or part-time paid employment in the nonprofit sector, either in later career or post-retirement years.

The intent of this report is to provide nonprofit organizations with an overview of the project findings to support their recruitment efforts. The research findings may also assist nonprofit networks and umbrella organizations to establish labour force development strategies that take into account late career and post-retirement workers from other sectors. In addition, the report may be of interest to late career and post-retirement employees who are interested in transitioning to the nonprofit sector.

Acknowledgments

The Canadian Career Development Foundation prepared the literature review for the Tapping into the Talents project. SPR Associates Inc conducted the survey. SPR's team for the project was led by Dr. Ted Harvey, President and Senior Consultant, SPR, who was overall study director. Dr. Morley Gunderson (University of Toronto) provided expertise on labour market issues; Dr. Marjorie Armstrong-Stassen (University of Windsor), provided advice on post-retirement employment; and both provided input on the survey plan and the draft study report. Dr. Brent Rutherford (York University), provided assistance with the sample design and statistical analysis of the survey results. Ms. Marian Ficysz, SPR Survey and Operations Director, managed the online survey, all data collection activities and computer tabulations. Ms. Lindsay Brunet, SPR Research Coordinator, assisted with the recruitment of employers and other organizations for the survey, and Dr. Patricia Streich, Senior Consultant, SPR, reviewed the final draft report.

Members of the HR Council's Late Career Advisory Committee provided advice and guidance to the project:

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2 What the literature tells us

The Canadian labour force is aging at a rapid rate, causing concern in all sectors about future productivity, skills shortages and sources of replacement employees.

A literature review provided the context and rationale for the *Tapping into the Talents of Late Career Employees* project. The literature review included an overview of:

- Canada's aging labour force
- Age of retirement trends
- Information about why older employees stay in the labour force and why they return post-retirement
- Labour force participation preferences of late career and post-retirement employees

Aging labour force⁴

The Canadian labour force is aging at a rapid rate, causing concern in all sectors about future productivity, skills shortages and sources of replacement employees. For the first time, there are just as many Canadian workers over age 40 as there are under. The 2006 census found that 24% of the labour force was between the ages of 45 to 54, and 12.7% was between the ages of 55 to 64 (Statistics Canada, 2009). Human Resources and Skills Development Canada (n.d.) estimates that by 2011, approximately 41% of the working population will be between the ages of 45 and 64, compared to 29% in 1991. In addition, Statistics Canada projects slower labour force growth over the next 25 years because of a lower birth rate along with an aging population (Martel et al., 2007). Considering that, on average, the lifespan after 65 is an additional 19.1 years (17.2 for men and 20.6 for women), there are many more years that a late career employee may stay active in the workforce (Statistics Canada, 2004a). With an aging workforce and population decline, older employees have become the largest talent pool that employers have to draw from.

4. Studies and reports on the aging labour force use different age references for “older” or “aging” workers. For example, the Expert Panel on Older Workers uses 55+ for their definition while Lowe (2007) refers to older workers as 45+ and Schellenberg and Ostrovsky (2008) focus on those aged 45 to 69. Baby boomers, who are increasingly pushing into the “older worker” category, generally include workers aged 45 to 64.

Reinventing retirement

Baby boomers have a history of reinventing life stages and social conventions. As this cohort ages, they are challenging assumptions about aging and retirement. Boomers are re-defining retirement. For many, retirement is not about the end of paid employment but rather a new start in life. When the age of retirement was set at 65, life expectancies were much lower; adults in the baby boomer age demographic now live longer. This generation is healthier and more active than their predecessors and can anticipate many more productive years. For the most part, they are also wealthier and better educated than previous generations.

The *Tapping into the Talents of Late Career Employees* project explores one aspect of the new face of retirement: the potential for late career or post-retirement sector transitions. The project findings help the nonprofit sector to understand where potential opportunities may lie and to anticipate the changes that will be required in human resource practices within the nonprofit sector.

Age of retirement trends

The oldest baby boomers are now approaching the traditional retirement age of 65. There are over 2 million employees (in 2006) that fall into the 55 to 64 year age bracket (Statistics Canada, 2009). The recent trend was early retirement; however as baby boomers have increasingly moved into the older employee category, this trend has reversed. Fewer older employees are retiring (using the traditional definition of leaving the paid workforce for good – see sidebar: Reinventing Retirement) and more recent research describes a pattern of employees remaining in the labour force. The average age of retirement in Canada is now 62 (Schellenberg & Ostrovsky, 2008), an increase from the 1999 figures of 60.1 years for women and 61.7 years for men (Schetagne, 2001).

From the General Social Survey 2007, Schellenberg and Ostrovsky found that of the near-retirees who are “very certain” of their age of retirement plans, about one-third expect to leave the workforce before age 60, another third expect to leave between age 60 and 64 and the final third expect to leave at age 65 or older.

Older employees returning to work

While some baby boomers are retiring later, some of those who made the break from the paid workforce are returning to work. Transitions to retirement can be complex. Recently retired workers may

experience a honeymoon period that can last from a few months to a few years. Following that phase, retirees may reassess their needs and preferences (Duchesne, 2004). Studies have revealed that a significant number of retired people want to reintegrate into the labour market after a few years (Policy Research Initiative, 2004).

The 2002 General Social Survey (Schellenberg et al., 2005) found various characteristics that influenced the likelihood of returning to work after an initial retirement:

- **Gender** – men were slightly more likely than women to return to work post-retirement
- **Health** – individuals in fair or poor health were far less likely to return to work than those whose health was excellent
- **Age** – individuals who first retired before age 60 were more likely to return to work than those who retired later; individuals who initially retired at 60 or later were more likely to work part-time than those who retired before 60
- **Occupational family** – individuals from professional occupations were most likely to return to work, followed by managers and technicians
- **Sector** – retirees from information, culture and recreation as well as construction were most likely to return to the workforce
- **Specific reason for retirement** – individuals who retired for reasons other than financial, those who received an early retirement incentive and those who no longer enjoyed their work were more likely to return to work.

The study found that 22% of retirees returned to employment because they did not like retirement and 19% mentioned the intrinsic rewards offered by work (including challenging tasks, social contacts, and sense of purpose). Overall, 55% cited at least one of these three non-financial reasons. (Schellenberg et al., 2005)

Another study found that bridge employment – paid work after an individual retires or starts receiving a pension – is more common among workers with a university education, and those living in rural areas or small communities (Hébert & Luong, 2008).

Reasons older employees continue working

The Expert Panel on Older Workers (2008) found that Canadians' transitions into retirement reflect individual choices concerning lifestyle, the desire to continue working to support a certain standard of living or because work itself has significance to the individual. Research has found that older employees continue to work for a variety of reasons:

- Staying involved with other people
- Staying mentally active
- Providing a sense of purpose and meaning
- Providing income
- Putting job skills and life experience to work

(BMO Financial Group, 2004; MetLife Foundation / Civic Ventures, 2005; Pope, 2008)

Labour force participation preferences

Accommodation of work preferences by employers is an important strategy for retaining older employees (as well as a strategy for increasing productivity). Based on the Rethinking Work Survey of 2004, Lowe (2007) identified that older employees place more importance on work-life balance, benefits and experiencing pride and accomplishment from their job (while younger employees place more importance on career advancement and extended leaves).

The survey found that workers experiencing high stress or dissatisfaction with their jobs planned to

retire earlier than co-workers with good work-life balance (Lowe, 2006). Statistics Canada research (Turcotte & Schellenberg, 2005) found that individuals in managerial, professional or technical jobs who experienced high job strain were much more likely to retire than those who expressed low job strain. Heavy workload, time pressures, conflicting demands and lack of autonomy were some of the job strain factors assessed in the research.

Lowe (2006) emphasizes the importance of job quality in retaining older workers, including factors such as flexible hours, part-time work, making a useful contribution to society, having opportunities for challenging and interesting work that matches employees' skills and interests, and low stress work environments. To improve job quality, some late career workers aspire to self-employment (Lowe, 2006; Policy Research Initiative, 2004).

A Statistics Canada report on retaining older workers (2004b) underscores the importance of work-life balance measures for late career employees. The report found that that 28% of retirees would have continued working had they been offered part-time employment. Overall, the literature on labour force preferences indicates that alternative working arrangements contribute to work-life balance of older employees for a number of reasons, including family responsibilities, personal health problems, declining physical capabilities or energy levels and an interest in pursuing leisure activities.

For older employees who decide to continue working (or to return to the paid workforce), phasing in retirement with fewer working hours is an understandably attractive option. Other flexible arrangements can include working from home or creating consulting/non-employee relationships (Commongood Careers, n.d.).



For more information about flexible working arrangements (including guidelines, policy templates and links to other online resources), check out the HR Toolkit:

<http://hrcouncil.ca/hr-toolkit/workplaces-flexible.cfm>

Career changes of older workers: opportunities for the nonprofit sector

Labour market authors have speculated that if the situation in the labour market offers greater employment prospects, older employees may look for the opportunity to change careers rather than retire from the labour market completely. Also employees no longer enjoying their work may choose a new career to find more satisfying work instead of retiring (Schellenberg et al., 2005). Older employees who choose to remain in the workforce may do so by changing jobs within an organization, moving to a new organization in the same sector or changing sectors altogether.

Some research has found that “making a contribution and helping others” becomes more important as adults age, giving them an increased sense of meaning and purpose in life (Cohen, 2005). This phenomenon may make the nonprofit sector, with its mission-driven employment opportunities, more attractive to older adults. With these thoughts in mind, we turn to the findings from the HR Council survey of late career employees.

3 What the survey findings tell us

The survey results echoed those from other research suggesting that a majority of respondents view retirement as a change-point in their work lives but not a time to stop working.

The purpose of this survey was to explore a variety of factors that might influence professional and managerial employees to pursue late career or post-retirement paid employment in the nonprofit sector. Specific objectives of the survey were to:

- Assess the awareness of jobs and careers in the nonprofit sector among recent retirees and late-career employees in other sectors
- Identify perceptions and expectations of job satisfaction in the nonprofit sector
- Assess the degree of interest in transitioning to employment in the nonprofit sector
- Identify factors which could influence a decision to work in the nonprofit sector
- Identify segments of the labour force which would be more/less likely to move to the nonprofit sector

In total, the survey provided data from over 5,000 mostly Anglophone Canadians: 85% were aged 45 to 65 and 66% were employed in management and professional-level jobs, reporting a wide range of skills and experience. Respondents were employed primarily in various forms of public service: 50% in provincial/territorial government; 12% in municipal government; and 18% in other public organizations. (See Appendix A for a copy of the survey questions along with a top line summary of survey responses.)

Retirement as a change-point in working lives

The survey results echoed those from other research suggesting that a majority of respondents view retirement as a change-point in their work lives but not a time to stop working. For various reasons, 57% indicated that they would plan to continue working after retirement.

Most respondents have maintained their retirement plans despite the recession. 62% of respondents said that the recent economic downturn had not affected their thinking on employment and retirement. Others said that they were now planning to stay at work longer or find another job on retirement. Women and respondents with lower incomes were more likely to have adjusted their plans.

Most respondents are planning to look for a new job opportunity within the next 10 years

Two thirds (67%) of respondents said they are likely to actively consider a new job or career within the next 10 years. This prospect is more immediate for those aged 56 to 65 than for the 46 to 55 age group.

Many respondents want a job where they can make a difference. When asked why they might consider a new job or career, respondents stated:

- To contribute to society/community (46%)
- To make better use of my skills/knowledge (37%)
- To expand my skills/knowledge (35%)
- Would like a change (34%)
- For increased income (31%)

Respondents were not aware of job opportunities in the nonprofit sector

66% of all respondents (and 60% of those respondents who are likely to consider a new career in the next 10 years) said they were not aware of, or considering, jobs in the nonprofit sector prior to receiving the invitation to complete the survey.

However, respondents are willing to consider the nonprofit sector; 64% said they might actively consider a new job or career in the nonprofit sector within the next 10 years. Only 2% of respondents who might look for a new job in the next 10 years said they would not consider a job in the nonprofit sector. Those who have volunteer experience are more likely to have considered the possibility of a finding a job in the nonprofit sector.

Some respondents perceived no obstacles to nonprofit jobs

More than one-quarter (27%) of respondents saw no obstacles to nonprofit jobs. However, almost half of respondents (47%) felt that inadequate compensation and benefits would be a barrier to a job in the nonprofit sector. This was less of a factor for older respondents and it was more of a factor for respondents who had adjusted their retirement/employment plans as a result of the recession. About one-third of respondents (36%) felt that nonprofit jobs would not match their skills and interests.

Many factors are important in a job

Before asking about potential job transitions, the survey asked respondents to identify factors that were important to them in a job (without specifying the sector). Subsequent questions asked respondents to identify factors that they perceived as characteristics of the nonprofit sector and characteristics that could attract them to a job in the nonprofit sector.

These characteristics can be grouped into three underlying dimensions (as determined by factor analysis):

- An intrinsically rewarding dimension, including challenging/interesting work, opportunity to contribute to the community
- A job flexibility dimension
- A financial dimension including good income, benefits and security

As Table 1 shows, “challenging, interesting work” and “good relations with managers and co-workers” were rated as the most important characteristics of an attractive job. Most respondents also considered attractive “work that aligns with personal values” and opportunities to “contribute to community, work for a cause.” Seventy-two per cent of respondents rated flexible working conditions as important.

Three-quarters of respondents rated “a good income” as an important characteristic of an attractive job while 63% identified “good benefits” as an important characteristic. (The 46 to 55 age group put more importance on the financial dimension than the older group.)

Nonprofit jobs are perceived as rewarding, but lower paying

The survey then asked respondents to select factors that they perceived as characteristics of jobs in the nonprofit sector. Respondents were most likely to select intrinsically rewarding benefits and least likely to select financial characteristics (See Table 2).

The nonprofit sector fares well when you compare respondents’ perceptions of jobs in the nonprofit sector against their identified characteristics of an attractive job (as listed in Table 1). Of the top 10 characteristics of an attractive job, most respondents perceived them to exist in the nonprofit sector with the exception of good income (rated 4th in Table 1) or good benefits (rated 8th). Interestingly, while only 18% of respondents felt job security was a characteristic of nonprofit jobs, only slightly more than half of respondents (see Table 1) felt it was a characteristic of an attractive job at this stage of their life.

Challenging, interesting work	90	1
Good relations with managers/co-workers	80	2
Team working environment	76	3
A good income	75	4
Flexible working conditions (e.g. hours, work location)	72	5
Work aligned with personal values	68	6
Opportunities to self-manage, make decisions about work	68	7
Good benefits	63	8
Contribute to community, work for a cause	60	9
Recognition for your work	57	10
Opportunities for training and professional development	56	11
Good physical working conditions	55	12
Job security	54	13
Ability to influence workplace decisions	51	14
HR practices sensitive to the needs of older workers	38	15
	% ¹	Ranking

TABLE 1
CHARACTERISTICS
OF AN ATTRACTIVE JOB

1. % OF RESPONDENTS THAT IDENTIFIED THIS CHARACTERISTIC AS IMPORTANT IN A JOB.

Contribution to community, work for a cause	77	9
Challenging, interesting work	75	1
Work aligned with personal values	68	6
Team working environment	65	3
Flexible working conditions (e.g. hours, work location)	59	5
Good relations with managers/co-workers	50	2
Opportunities to self-manage, make decisions about work	47	7
Recognition for your work	44	10
	% ²	Ranking in table 1

TABLE 2¹
PERCEIVED CHARACTERISTICS OF NONPROFIT JOBS

1. IT IS IMPORTANT FOR THE READER TO EVALUATE THESE PERCEPTIONS AGAINST THE REALITY OF THE SECTOR.

2. % OF RESPONDENTS THAT PERCEIVED THIS AS A CHARACTERISTIC OF A NONPROFIT JOB.

Challenging work and flexible working conditions could attract employees to the nonprofit sector

Respondents were also asked which characteristics could attract them to a job in the nonprofit sector. Factors which were most frequently selected were similar to those identified as being strengths of the sector. (However, there is a slight difference in the ranking of job characteristics – intrinsic factors become more important and financial factors less important.) “Challenging, interesting work” continues to top the list (see Table 3) followed by “flexible working conditions.” Financial factors were less frequently mentioned by people with higher incomes as well as older workers.

“I think working for a non-profit organization would be both challenging and rewarding as I am at the stage in my life that I would like to do for others, yet I also need to supplement my income. I welcome change, it keeps life exciting!”

–Survey respondent

Other characteristics (not in the top 10 above) that respondents said would attract them to a nonprofit job included: opportunities for training and professional development; good physical working conditions; job security; ability to influence workplace decisions; HR practices sensitive to the needs of older workers; and, smaller, flatter, more informal organizational structures. However none of these additional characteristics were among the top 10 characteristics important in a job (see Table 1).

Challenging, interesting work	75	1
Flexible working conditions (e.g. hours, work location)	71	5
Work aligned with personal values	65	6
Contribute to community, work for a cause	62	9
Team working environment	60	3
A good income	60	4
Good relations with managers/co-workers	57	2
Opportunities to self-manage, make decisions about work	57	7
Good benefits	45	8
Recognition for your work	42	10
	% ¹	Ranking in table 1

TABLE 3
CHARACTERISTICS THAT COULD ATTRACT AN INDIVIDUAL TO A NONPROFIT JOB

1. % OF RESPONDENTS THAT IDENTIFIED THIS AS A CHARACTERISTIC THAT COULD ATTRACT THEM TO A NONPROFIT JOB

Respondents identified leave or part-time work as an important benefit in any future job

Respondents indicated a strong interest in the availability of part-time employment. Many also expressed interest in leave for personal and family reasons, seasonal or part-year employment and generous vacation leave.

- Extended health benefits (dental, vision, etc.) (68%)
- Availability of part-time employment (62%)
- Leave for personal and family reasons (51%)
- Availability of seasonal or part-year employment (47%)
- Generous vacation leave (45%)
- Life and/or disability insurance (41%)
- Private pension plan or retirement savings contributions (39%)

Leave and part-time work are more likely to be important to respondents ages 56 to 65, whereas financial benefits are more likely to be important to the 46 to 55 age group.

Personal contact is an important job search strategy

When asked about finding a job in the nonprofit sector, almost three-quarters of all respondents said personal contacts and networking was their preferred job search strategy (although many likely had limited contacts in the sector). Next, was general job search websites (54%) followed by newspaper classifieds/careers sections (50%) as well as job search websites focused specifically on the nonprofit sector (50%).

More information needed by those seeking jobs in the nonprofit sector

“Information about the types of job opportunities in the nonprofit sector” tops the list of resources which would assist individuals seeking to find jobs in the nonprofit sector (83%). Respondents also identified the following as helpful:

- Information about specific nonprofit job opportunities (70%)
- Information about nonprofit organizations (56%)
- A matching service to find suitable nonprofit jobs (45%)
- Information about workplace culture in the nonprofit sector (44%)
- Information about transitioning from other sectors into the nonprofit sector (43%)

The type of information identified as least useful was public information forums such as job fairs (35%).

4 Observations and conclusions

As an initial investigation, the project intentionally focused on the supply side of the labour market equation. More exploration of the demand side still needs to occur.

T*apping into the Talents of Late Career Employees* was an initial foray into a much larger issue: whether and how baby boomers from other sectors could be a supply of labour for the nonprofit sector. What we know, at this juncture, is that there is a large cohort of baby boomers – many of whom are highly skilled with functional expertise that could be useful to the nonprofit sector – fast approaching the traditional age of retirement. There is compelling evidence that, for many boomers, retirement is not about the end of paid employment but rather a new start in life. Recent HR Council research confirms earlier research from the United States that identifies an interest by late career (as well as post-retirement) employees in continuing to work into their “traditional” retirement years. These baby boomers seek meaningful work and flexible work arrangements. As the nonprofit sector potentially can meet both of these requirements, there is a significant opportunity to attract late career/post-retirement employees from other sectors.

The HR Council survey revealed a major barrier: a low level of awareness of employment opportunities within the nonprofit sector among employees in other sectors. However, the survey results also uncovered a willingness among late career employees to consider transitioning to the nonprofit sector.

The work of raising awareness about opportunities in the nonprofit sector is more than just a task for the sector itself. There is also a role for public and private sector employers, consultants and educational institutions that provide non-financial retirement planning programs to provide introductory information about the nonprofit sector and the types of employment opportunities that exist.

As an initial investigation, the project intentionally focused on the supply side of the labour market equation (i.e. late career and post-retirement employees from the public and private sectors). More exploration of the demand side (i.e. nonprofit sector employers) still needs to occur: Are Canadian nonprofit sector employers interested in recruiting late career and post-retirement employees from other sectors? Are there particular areas of activity within the sector that are more or less interested?

The nonprofit sector also needs to explore potential challenges and barriers – to employers and prospective employees – of integrating late career employees from the public and private sectors into the nonprofit sector. U.S. research suggests that such barriers include ageism, concerns about cultural fit, lack of strategic workforce development and HR management capacity, and a need for flexible work models, expanded recruitment networks, and new pathways to nonprofit jobs for older adults. There are also concerns about unintended impacts on the existing nonprofit workforce, such as decreased opportunities for promotion (Casner-

Lotto, 2007). If substantial interest exists in Canada and significant obstacles are identified, further work will need to be done to identify and implement strategies and effective practices to recruit and retain late career and post-retirement employees transitioning to the nonprofit sector.

The HR Council is undertaking this next level of investigation through an additional project that tests the hypothesis that high skill baby boomers represent a potential supply of labour, both paid and unpaid, for the nonprofit sector. The conversation started in this report on the *Tapping into the Talents of Late Career Employees* project continues in a report entitled *The Boomer Boon: Generating ideas about engaging baby boomers in the nonprofit sector*. This second report identifies issues associated with late career recruitment and retention from the perspectives of employers, existing employees, prospective employees and labour market intermediaries, and makes recommendations to address these issues.

Appendix

Top line summary of HR Council late career survey statistics

Survey Methodology: Public and private sector employers were approached and asked to invite their employees to participate in the online survey by distributing email invitations or by posting a notice on their company web site or newsletter. Some unions and associations also distributed invitations or posted a notice. Although employers from all regions of the country participated in the study, some regions were over-represented in the survey sample: Atlantic Canada (60%); and the Northwest Territories and Ontario (22%) of respondents. Employers who declined to participate included the Government of Canada and a number of provincial governments and private corporations.

A pre-test of the survey was conducted online (in English) in August 2009. After minor changes, the survey was translated into French, uploaded and launched in September 2009 with email communication to employers. Extensive telephone and email follow-up correspondence with employers and employees took place from mid-September to December 2009. A bilingual, toll-free hotline was available for respondents during this time.

Overview of Results: The survey results presented on the following pages reflect responses received as of December 29, 2009 for a survey assessing interest in late career/post-retirement paid employment in the nonprofit sector. The results shown are based on just over 5,300 survey responses.

Method of Presentation: For each question, the percentage of valid responses is shown (valid responses represent the number of responses to each question noting that, for some individual questions, respondents were “skipped” past certain questions which did not apply, or some questions were simply not answered).

The total number of individuals responding to each survey question (the “n”) is shown immediately after the question as [n = 111]. It is important to note that the “n” of respondents answering a given question is determined, to a great extent, by answering preceding questions which, in some cases, “skipped” respondents past some question(s). Thus, some questions are answered by fewer respondents.

All results are based on a sufficient sample for a reasonable degree of statistical confidence (at least 20 responses, excluding “don’t know” and “not applicable” responses).

A national survey assessing interest in mid- to late career transitions from the public sector or private sector or retirement, to paid employment in the non-profit sector

A research project conducted by the HR Council for the Voluntary & Non-profit Sector

A. General Questions

1. How did you learn about this survey? (Select one) [n = 5,321]

29.9%	Direct E-mail invitation from the HR Council
54.4	E-mail or web-link provided by my employer
6.2	E-mail or web-link provided by my union
5.2	E-mail or web-link provided by a membership association I belong to
4.3	Other

2. What is your current employment status? (Select one) [n = 5,302]

87.0%	Employed full-time (SKIP TO QUESTION 4)
5.9	Employed part-time (SKIP TO QUESTION 4)
1.1	Self-employed or employed on contract (SKIP TO QUESTION 4)
.6	Not currently employed, but looking for work
4.1	Retired
1.3	Other

3. If not currently working, was your most recent job full-time or part-time? (Select one) [n = 356]

81.2%	Full-time
18.8	Part-time

4. Is your current job (or was your most recent employment) in: (Select one) [n = 5,235]

6.1%	The private sector
5.0	A Federal Government Department
6.5	A Federal Agency or Crown Corporation (RCMP, Post Office, etc.)
49.6	A Provincial/Territorial Government Department or Agency
11.9	A Municipal Government or Agency
18.0	Another public organization (e.g. school, library, hospital, university)
1.5	The non-profit sector (SKIP TO QUESTION 29)
1.4	Other

5. In which of the following industry or service sectors are you currently, or were you most recently employed? (Select one) [n = 5,246]

25.8%	Public administration (Government)
.8	Communications (broadcasting, publishing, etc).
3.7	Technology (IT services etc.)
5.0	Post office, couriers
4.8	Finance, Insurance or Real Estate
.9	Manufacturing (auto industry, steel, etc.)
7.7	Law enforcement
17.4	Education
16.8	Health
6.1	Social services
2.5	Transportation
.3	Mining, Petroleum or Utilities
.4	Retail and Food Distribution
.9	Arts, Entertainment, Recreation, Hospitality or Tourism
6.9	Other

6. How would you describe your current position or the most recent position you held? (Select one) [n = 5,237]

8.2%	Senior management
26.0	Mid-level manager or supervisor
32.0	Professional
10.1	Technical staff or paraprofessional
3.7	Front-line sales, customer service
15.9	Clerical, administrative or support staff
4.2	Other

7. Are you a licensed or certified professional (e.g. lawyer, physician, accountant, teacher, etc.)? (Select one) [n = 5,191]

42.1%	Yes
57.9	No

8. What type(s) of experience could you bring to a potential employer? (Select all that apply) [n = 5,227]

61.1%	Client services
61.3	Working in collaboration or partnership with other organizations
17.1	Executive level management experience
29.4	HR and personnel management

42.9	Clerical/administrative skills
48.0	Mid-level management/leadership experience
58.4	Supervisory experience
20.0	Finance
32.6	Strategic planning
45.9	Project management
42.4	Monitoring & evaluation
33.3	Research
13.1	Management of technology (computers, information technology)
13.0	Procurement & purchasing (managing contracts with suppliers)
19.0	Fundraising
11.2	Legal knowledge
22.2	Proposal writing
11.2	Marketing
17.3	Advocacy
48.2	Teaching, instruction
33.5	Communications
22.9	Bilingual or multilingual language skills
6.5	Other
.9	None of the above

9. Which of the following factors are important to you in a job? (Select all that apply)
[n = 5,230]

75.4%	A good income
89.8	Challenging, interesting work
23.4	Smaller, flatter, more informal organizational settings
60.1	Opportunity to contribute to community, work for a cause
68.4	Work that aligns with personal values
51.4	Ability to influence workplace decisions
56.9	Recognition for your work
55.8	Opportunities for training and professional development
55.0	Good physical working conditions
80.3	Good relations with managers, co-workers
75.6	A team working environment
54.3	Job security
63.3	Good benefits
67.6	Opportunity to self-manage, make decisions about your work
72.0	Flexible working conditions (e.g. control over hours and/or work location)
37.6	HR policies and practices which are sensitive to the needs of older workers
2.3	Other

10. Have you ever held a paid position in the non-profit sector? (Select one) [n = 5,206]

- 24.0% Yes
- 72.6 No
- 3.4 Uncertain, don't remember

11. Have you been a volunteer (unpaid) with a non-profit organization or charity within the past five years? (Select one) [n = 5,200]

- 34.2% Yes, I am currently a volunteer
- 29.4 I have volunteered in the past 5 years, but not at this time
- 36.4 No, I have not volunteered in the past 5 years

B. Potential Job/Career Transitions

12. When, if at all, do you think you might actively consider a new job or career? (Select one) [n = 5,232]

- 7.6% Immediately
- 13.2 Within the next year
- 29.0 In the next 2-5 years
- 17.4 Within 6-10 years
- 3.3 Other
- 14.9 Uncertain at this time
- 14.6 Not applicable/not interested in considering a new job/career (SKIP TO QUESTION 15)

13. Why might you consider a new job or career? (Select all that apply) [n = 4,451]

- 36.6% To make better use of my skills/knowledge
- 35.1 To expand my skills/knowledge
- 45.5 To contribute to society/community through my work
- 34.3 Would like a change
- 31.4 For increased income
- 1.0 Currently unemployed
- 4.5 I expect my current job to end/I could become unemployed (laid-off)
- 57.4 I plan to retire and will seek employment after retirement
- 6.2 Other

14. Which of the following benefits would be important to you in a new job? (Select all that apply) [n = 4,449]

- 67.5% Extended health benefits (dental, vision, etc.)
- 41.2 Life and/or disability insurance
- 38.8 Private pension plan or retirement savings contributions
- 61.5 Availability of part-time employment
- 47.4 Availability of seasonal or part-year employment
- 50.5 Leave for personal and family reasons
- 45.1 Generous vacation leave
- 3.9 Other
- 1.8 None of the above

15. Has the recent 2008-2009 economic downturn impacted your thinking or decisions about your employment or retirement? (Select all that apply) [n = 5,109]

- 14.4% Yes, because of the downturn, I plan to delay my retirement
- 13.1 Yes, because of the downturn, I will need to continue working after retirement
- 6.8 Yes, because of the downturn, I think this is not a good time to consider a job or career transition
- 6.4 Yes, because of the downturn, I am more likely to consider a job or career transition
- 61.6 No, the recent economic downturn has not affected my thinking on these matters
- 8.2 Uncertain

16. Which of the following do you see as characteristic of jobs in the non-profit sector and which, if any, might lead you to consider a job/career in the non-profit sector? (Select all that apply) [n = 4,158]

	CHARACTERISTIC OF JOBS IN THE NON-PROFIT SECTOR	MIGHT LEAD ME TO CONSIDER A JOB IN THE NON-PROFIT SECTOR
A good income	23.5%	59.7%
Challenging, interesting work	74.8	74.5
Smaller, flatter, more informal organizational settings	50.7	35.8
Opportunity to contribute to community, work for a cause	77.1	62.4
Work that aligns with personal values	68.4	65.1
Ability to influence workplace decisions	39.0	44.5

	CHARACTERISTIC OF JOBS IN THE NON-PROFIT SECTOR	MIGHT LEAD ME TO CONSIDER A JOB IN THE NON-PROFIT SECTOR
Recognition for your work	43.6	41.5
Opportunities for training and professional development	31.1	41.8
Good physical working conditions	28.9	42.8
Good relations with managers, co-workers	50.2	57.0
A team working environment	65.0	59.9
Job security	18.4	33.2
Good benefits	23.1	45.2
Opportunity to self-manage, make decisions about your work	47.3	56.6
Flexible working conditions (e.g. control over hours/days/work location)	58.7	70.5
HR policies/practices which are sensitive to the needs of older workers	30.3	40.1
Other	2.7	2.6

17. If you indicated "Other" in Question 16, above, please explain.

18. When (if at all) might you actively consider a new job or career in the non-profit sector? (Select one) [n = 5,193]

- 6.7% Immediately
- 11.7 Within the next year
- 27.3 In the next 2-5 years
- 18.6 Within 6-10 years
- 3.9 Other
- 23.0 Uncertain at this time
- 8.8 I would not consider late career or post-retirement employment in the non-profit sector (SKIP TO QUESTION 21)

C. Jobs in the Non-Profit Sector

19. Which of the following sources would you use to search for a job in the non-profit sector? (Select all that apply) [n = 5,333]

49.6%	Job search web-sites with a non-profit/voluntary sector focus (e.g. Charity Village)
53.8	General job search web sites such as Workopolis or Service Canada's Job Bank
49.7	Newspaper (classifieds, careers)
73.8	Personal contacts (networking)
3.9	Other
.9	None of the above
10.6	Don't know

20. What type of information and/or assistance would you find useful when considering a job/career in the non-profit sector? (Select all that apply) [n = 4,716]

83.1%	Information about types of job opportunities in the non-profit sector (including salaries)
69.6	Information about specific non-profit job opportunities
55.8	Information about non-profit organizations
43.9	Information about workplace culture in the non-profit sector
43.2	Information about transitioning from other sectors to the non-profit sector
34.6	Public information forum, such as a job fair
45.3	A matching service to find suitable non-profit jobs
.9	Other
5.3	Don't know

21. What obstacles, if any, do you see to your pursuing a job/career in the non-profit sector? (Select all that apply) [n = 5,059]

36.6%	Jobs would not match my skills and interests
46.7	The compensation and benefits would be inadequate
15.0	I would need to adjust to a different workplace culture
14.6	I would need training upgrades (e.g. in technology)
5.8	Other
26.6	I see no obstacles

22. Were you aware of, or considering job/career opportunities in the non-profit sector prior to receiving the invitation to complete this survey? (Select one) [n = 5,136]

33.7%	Yes, I was previously aware of/considering employment in the non-profit sector
66.3	No, I had not thought about employment in the non-profit sector prior to receiving the survey invitation

23. Do you have any comments about transitioning to employment in the non-profit sector?

D. General Information/Demographics:

The following questions are being asked to allow us to understand the population responding to the survey and are strictly for research purposes.

24. What is your highest level of formal education? (Select one) [n = 5,208]

.8%	Grade school or some high school
8.1	Completed high school
11.5	Some community college or university, did not finish
23.5	Technical or trade school or community college diploma
30.8	Undergraduate degree
18.5	Post-graduate degree (Master's or Doctorate)
6.8	Other

25. Which of the following sources would you use to search for a job in the non-profit sector? (Select all that apply) [n = 5,333]

4.1%	Less than \$30,000 per year
21.0	\$30,000 - \$49,999 per year
33.1	\$50,000 - \$69,999 per year
24.2	\$70,000 - \$89,999 per year
17.6	\$90,000 or more per year

26. Please indicate your age group: (Select one) [n = 5,230]

12.6%	Under 45
57.3	45-55
27.9	56-65
2.1	66-75
.1	Over 75

27. Please indicate your gender: [n = 5,224]

62.9%	Female
37.1	Male

28. To help us to understand the distribution of survey responses by region, please provide the first three characters of your home postal code:

Home postal code: _____

29. Do you have any other comments?

Thank you for your participation!

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