

LA RELÈVE: SUCCESSION IN QUEBEC'S COMMUNITY SECTOR

AN ISSUE THAT CONCERNS US ALL



L'ADN DES RESSOURCES HUMAINES



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Forward to the English Edition

La Relève is a unique piece of work resulting from over a decade of labor force efforts within the province of Quebec focused on the non-profit sector. Unfortunately, until now, much of the work has not been appreciated by the rest of Canada as this document has not been available in English. The Institute for Nonprofit Studies at Mount Royal College is focused on bringing new ideas and information forward for discussion and consideration by Canada's non-profit sector. In making the translation of *La Relève* possible, the Institute for Nonprofit Studies is helping to bring ideas and processes that are well established in Quebec to the rest of the country.

In both the community and social economy sectors in Quebec, there is increasing awareness about issues related to paid employment, including succession and succession planning. This is in large part due to the work of the Comité sectoriel de main-d'œuvre Économie sociale et Action communautaire (CSMO-ESAC), a non-profit organization that has been in existence for ten years with a mandate to address issues of paid employment in both community-based organizations and enterprises of the social economy.

Commissioned by the CSMO-ESAC, the original French document, *La Relève*, is a combination discussion paper and workbook, aimed at raising awareness about labour market and workforce demographics both in Quebec generally and more specifically in the province's community sector. The target audiences for this document are community-based organizations in Quebec. While the majority of the statistics found in the document are specific to Quebec, many of the issues and concepts about succession in the community sector have broad and universal applications for the voluntary and non-profit sector in provinces and territories outside Quebec.

The history and culture of Quebec have had a marked influence on social and economic policies, programs and practices that affect both the community and social economy sectors. Such an analysis is beyond the scope of these few pages. Nevertheless, there are a few contextual differences between Quebec and the rest of Canada that are important to understand when reading this document.

In Canada, putting a single name or label to this sector remains an elusive task: at various times and in various locations it has been called the voluntary sector, the non-profit sector, the third sector, the community sector and the social sector. In Quebec, they generally reference two separate sectors: the social economy sector and the

community sector. There is in fact a government policy on the community sector in Quebec (see below). And while the social economy sector in Quebec is not the target audience for this particular document, it should be noted that the 2006 Quebec Social Economy Summit paid particular attention to issues of paid employment in social enterprises and that the CSMO-ESAC works closely and collaboratively with that sector as well.

Quebec's Governmental Policy on Community Action

The government's general objectives reflected in this policy are:

- ▶ Acknowledging, promoting, and supporting community action in the broad sense.
- ▶ Acknowledging, promoting, and consolidating independent community action, more specifically rights advocacy organizations.
- ▶ Ensuring the sustainability of community action through general operations and broad national guidelines that apply to all government departments and agencies.
- ▶ Recognizing and supporting volunteering as practised in community organizations.

Through the policy, the government places community organizations at the very heart of Québec's social practices and recognizes their role in Québec's social and economic development while allowing them to maintain their independence and freedom of action. The policy also harmonizes the various funding mechanisms used by government departments and agencies.

In reading this document, you will see that many of the characteristics of the labour force in Quebec resemble those of other provinces and territories. For example, Quebec has an aging workforce, a relatively low overall unemployment rate and a need for more skilled workers. It is also drawing more and more on immigrants as a source of supply for its labour force. The characteristics of the community sector's workforce in Quebec also bear many similarities to those in other provinces. Most of the employees are women, many have college or university degrees, and the age demographics are not dissimilar to the voluntary sector as a whole in Canada.

Forward to the English Edition

Unlike many of its counterparts, Quebec continues to have more net out-migration to other provinces. And while Quebec shares jurisdiction with the federal government on immigration matters, it of course recruits and attracts more French-speaking newcomers than do other provinces. There also continues to be a steady flow of workers moving from some of the regions to the larger urban centres.

This document recognizes that different regions of Quebec face different economic and labour force realities. It calls on readers to consider succession planning in the context of their own regions and their respective organizations.

The province of Québec is divided into 17 administrative regions. This territorial division serves as a framework for the economic, cultural and social activities of the different governmental ministries and organizations. Each administrative region differs from the others with regards to its geography, natural resources, habitable land, economic activities and resulting industries. Education, social and health care services, sports and leisure activities as well as transportation fall under the jurisdiction of the different levels of government in the region. (Government of Quebec).

Another notable difference in the community sector in Quebec is the existence of a wide range of formal networks and provincial associations, some of which are funded at least in part by the provincial government. They are generally organized by sub-sector or by issue and their mandates often include convening relevant stakeholders to deliberate on matters and take action as needed. Because of the existence of these networks, provincial organizations like the CSMO-ESAC are able to identify and bring together established sub-sectoral organizations, facilitating the identification of issues related to paid employment, discussions on collective actions to be taken, and collaboration to achieve defined results or outcomes. By and large, there are few established and sustainable networks of voluntary organizations at the provincial or regional level outside of Quebec, which at times makes collaboration and the development of joint strategies more challenging.

In the Quebec context, the term ‘concertation’ is often used and it has no true equivalent in the English language. ‘La concertation’ can best be described as the action of convening key stakeholders over a period of time with the express purpose of listening to, and understanding their concerns and perspectives on an issue, and if possible, to develop an integrated strategy with shared objectives that reflects and takes into account all expressed concerns and perspectives. It involves extensive dialogue but when ‘concertation’ is possible, the actors are joined together in a common bond that generally has more strength than coalitions.

English readers being able to access *La Relève* for the first time through this translation will encounter thinking that ignited discussion and dialogue both within and across organizations in many regions of Quebec. The issue of succession and succession planning transcends boundaries, and the concepts and approaches herewith described will likely resonate with stakeholders in the voluntary and non-profit sector outside of Quebec.

LA RELÈVE: SUCCESSION IN QUEBEC'S COMMUNITY SECTOR

AN ISSUE THAT CONCERNS US ALL



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PREFACE

FOR WHOM AND WHY HAS THIS STUDY PAPER ON SUCCESSION IN THE COMMUNITY SECTOR BEEN PREPARED?



In preparing this paper, the CSMO-ÉSAC aimed to:

- 1) **Encourage reflection on the main issues involved in succession**
- 2) **Determine the characteristics of the community sector in regard to succession**
- 3) **Consider the question of succession in view of the anticipated labour shortage**
- 4) **Identify possible means of action**

Designed for managers and members of boards of directors, this discussion paper does not pretend to have answers to every question, or “recipes” that will help community organizations meet the challenge of succession. It should also be noted that it does not seek to explain the state of the labour force and labour market in Quebec.

When studying the issue of succession, it was difficult to ignore the labour shortage predicted for the next few years. This issue is of significant concern for human resources managers in both the private and public sectors.

It is also difficult to predict the consequences of this labour shortage on community organizations. Although unsettling, this issue has not been raised as an alarm. We have preferred to suggest certain possibilities that could be studied and to address a series of questions to the persons in charge of community organizations.

In other words, although present throughout the document, the labour shortage issue is not the only angle from which the question of succession has been – or should be – considered.

Now, it is up to you!

GETTING STARTED |

A FEW QUESTIONS SO YOU CAN HAVE YOUR SAY...

Why is so much attention being paid to succession today?



Could we establish parallels between what is occurring in the general labour market and the specific reality of community organizations?

Does the issue of succession pose a problem for leaders in community organizations?
Practitioners?
Representatives?
All employees?



Does the current situation create risks in regard to maintaining and developing organizations and the community sector as in other sectors of activity?



Do community organizations have advantages and characteristics that could become assets in ensuring the effective succession of talent?



WHAT SOLUTIONS ARE POSSIBLE?



INTRODUCTION



What do we mean by “succession?”

We need to answer this question in order to frame the discussion throughout the document.

Today, succession planning is an issue for all organizations in Quebec and Canada, whether private, public or non-profit (NPO). Authors, researchers and organizations have started to consider the challenges underlying this issue, particularly in regard to attracting and retaining employees and transferring acquired knowledge and know-how. In the community sector, the issue of the succession can be approached in several ways:

- ▶▶ Bringing in young people or new individuals with various levels of experience
- ▶▶ Recruiting new members
- ▶▶ Replacing volunteers on boards of directors, committees or volunteer teams

Why talk about succession in the community sector? Why talk about it today, when 10 years ago, it was not even a consideration? In the next ten years, there will likely be a labour shortage in Quebec – a situation that will affect the entire western world. In short, the employers’ market from 1980 to 2000 has now become an employees’ market.

So, we should not be surprised if, in this context, succession also becomes a major concern in the community sector, perhaps even as important as in large public and private organizations. In the community sector, as in other sectors of activity, employees are aging and many will soon be retiring.

This concern raises a number of questions:

What parallels can we make between the general labour market and the situation facing community organizations?

In terms of succession, will the community sector encounter difficulties similar to those observed in other sectors of activity? Is there reason for concern?

Will the labour shortage affect the community sector slightly, a great deal, or tremendously?

Will there be comparable challenges ahead in attracting and retaining employees in community organizations?

Should we fear that the maintenance and development of organizations in the community sector will be threatened?

What will this mean for each sub-sector? Will they also be affected?

What are the most appropriate solutions?

Does the community sector have advantages or special characteristics compared to other employment sectors which, used wisely, could become important assets?

INTRODUCTION



While we cannot answer all of these questions, just asking them nevertheless demonstrates how vast the issue of succession is. The primary objective of this study paper on succession in community organizations is to provide the players involved with a series of tools that will allow them to:

- ▶▶ Start to reflect on the major issues related to succession
- ▶▶ Identify the characteristics of the community sector in regard to succession
- ▶▶ Position the issue of succession in context of the anticipated labour shortage
- ▶▶ Identify avenues for action

Now it's up to you to consider this issue.



PART 1

NEW ISSUE, NEW CONCEPTS



A new issue is generally accompanied by myriad concepts. This is certainly true for succession and its related issues. The following is a brief lexicon to serve as a guide.

ENVIRONMENTAL SCAN

The goal of an environmental scan is to find out, as precisely as possible, the context in which organizations will be developing over the next few years. It involves identifying the factors that will influence the organization, evaluating the impacts on the workforce and deciding on measures to be taken to reduce the organization's vulnerability. These factors are twofold:

- ▶ **The external environment:** unemployment rate, labour market, education, political and legislative environment, emigration, immigration, etc.
- ▶ **Internal environment:** working conditions, composition of the workforce (gender, age, employment status, etc.), personnel movements (departures, long-term leaves), vulnerable positions, organizational structure, etc.

An environmental scan is the basis for all workforce planning, which will lead to a succession plan.

ATTRACTING AND RETAINING EMPLOYEES

Faced with increasing competition and a significant shortage of experienced workers, organizations are questioning what working conditions they need to introduce in order to attract and retain the most qualified people at all employment categories and levels.

The ability to attract depends on the organization's reputation, its workplace, specialized job titles, employment conditions, corporate culture, mission, management philosophy, ethics, etc. In order to put its recruitment methods into practice, an organization must identify the strengths it can count on to attract employees.

Retaining employees refers to the organization's ability to introduce measures that reduce the temptation of going to work for another employer. Qualified employees are a precious commodity. To increase employee retention, we need to learn how to get to know our employees well in addition to knowing what motivates them.

Retention strategies are evaluated according to the mission, organizational culture, the organization's resources and its position in the labour market. We can adopt overall strategies for all organizations and their employees and personalized strategies to retain certain individuals, for example, by offering training programs.

SUCCESSION CANDIDATE / HIGH-PROFILE CANDIDATE

A succession candidate is an individual who, due to his or her qualifications, knowledge and personal qualities can take on a more senior position in the organization.

A high-profile candidate is an individual who, due to his or her qualifications, knowledge and personal qualities offers a sure advantage for the organization and who, simply through his or her presence, makes a difference to the organization.

LABOUR SHORTAGE

A labour shortage can be quantitative, qualitative or organizational.

A quantitative shortage means there is a significant imbalance between the number of employees required and the number of individuals available to fill the vacant positions.



A qualitative shortage refers to an individual's skills and qualifications. A qualitative shortage occurs when the number of workers is more or less sufficient to fill the demand, but their qualifications do not correspond to the needs of the organization or the labour market.

An organizational shortage refers to an organization's ability to attract and retain compared to the overall labour market. Several elements can be considered, including working conditions, management approaches, salaries and the status of the job.

WORKFORCE PLANNING

Workforce planning is a meticulous and structured exercise where a quantitative and qualitative portrait of an organization's employees is prepared. Its purpose is to increase the organization's knowledge of foreseeable personnel movements, vulnerable positions and key individuals in the organization. The employer will then have the necessary information on the current and future situation of the organization's human resources...and can begin to prepare an effective succession plan.

PLANNING AND MANAGING THE SUCCESSION (SUCCESSION PLAN)

A succession plan encompasses all of the strategies and activities, based on an analysis of the internal and external environment and a workforce plan, that are designed to identify, analyse, predict and take action in regard to an organization's human resources needs. A succession plan will ensure that the organization has the right number of qualified employees at the right time.

PART 2



DISCUSSING SUCCESSION TAKING SHIFTS IN THE LABOUR MARKET INTO CONSIDERATION

A brief review of the past demonstrates that the position and role of succession in any organization is closely related to the overall labour and employment market.

1960-1980: AN ABUNDANT WORKFORCE

Between 1960 and 1980, there was an explosion of activity in several sectors of our society, with the world in growth mode and the first baby-boomers entering the job market. This period was also marked by the introduction of a number of social programs such as Employment Insurance, universal old-age pension at age 65, the Guaranteed Income Supplement, public car insurance, public health insurance, and the *Régie des rentes du Québec*. The coffers were full and there was an abundant supply of employees.

1980-2000: AN EMPLOYER'S MARKET

During the 1980s, which began with a major economic recession, the emergence of increased automation, communications and information technologies and even computerization of work stations caused a great deal of upheaval. This period was also marked by economic and market globalization, two phenomena often used as a pretext for an unprecedented wave of reorganization and mergers, the consequence of which was massive downsizing.

Something new: massive layoffs not caused by financial difficulties. Rationalization became a management strategy. It affected blue-collar workers, managers and production employees. At the same time, hierarchical levels were also being streamlined.

These massive and blind rationalizations had, and are still having, devastating effects on labour. Working conditions deteriorated significantly. Staffing was considerably reduced, with a dramatic increase in the number and length of long-term sick leaves caused by burnouts. These management practices also resulted in an important decline in organizational loyalty, while the supply of employees remained abundant.

YEAR 2000 AND BEYOND AN EMPLOYEE'S MARKET

The years after 2000 stand out clearly from previous periods. At the turn of the century, the situation changed, as recruitment problems arose in many sectors of activity, particularly health and social services.

If, for the past five years, strategic human resources planning and workforce planning as well as succession planning have become a hot topic, it is first and foremost because we are passing from an abundance of available employees to a significant and unparalleled labour shortage.

Recent years have therefore been marked by the transition from an employer's market to an employee's market. In fact, the demographic shock, combined with the increased qualifications of the labour pool, are becoming growing concerns.

THE TRANSITION FROM AN INDUSTRIAL SOCIETY TO A KNOWLEDGE-BASED SOCIETY

The transition from an industrial society to a knowledge-based society has direct implications for the labour market and significant psychological impact on the workforce. Globalization, cost reduction, performance and flexibility are terms commonly used to describe the contemporary reality of organizations.



DISCUSSING THE SUCCESSION TAKING SHIFTS IN THE LABOUR MARKET INTO CONSIDERATION

The knowledge-based society imposes new trends (performance, speed, competitiveness) and dictates new skills (data processing, working under pressure, international knowledge). Not only are qualifications more specialized and advanced, but once acquired, they very quickly become outdated. We are witnessing a marked increase in academic requirements for many types of

employment. In this regard, according to a study by the *Institut de la statistique du Québec*, the proportion of Quebecers who obtained an undergraduate degree rose from 14.9% in 1976 to 25.7% in 2006¹, while the number of persons who obtain a master's degree has constantly increased since the 1990s.²

FACTS AND FIGURES ON THE AGING OF THE WORKFORCE IN QUEBEC

In an article³ on aging of the population, the author offers the following facts:

The phenomenon of aging of the population in Quebec, as elsewhere, is nothing new. The baby-boomers, who are the result of a demographic explosion in the 1950s, and the falling birthrate of the past three decades are systematically cited as an explanation. But what is the actual situation?

The average age in Quebec increased from approximately 30 in 1971 to a little over 38 in 2001. The average age of Canadians is now a little less than 38 years. This means that aging is occurring more rapidly in Quebec than in the rest of the country. Within seven years, it is estimated that labour force growth will end and begin to decline rapidly.

Situation by sector

Without exception, all sectors of activity seem to be affected by an aging workforce.

In 2002, in the primary sector, 39% of the workers were 45 years of age or over. The percentage was 35% for the secondary and tertiary sectors.

In the secondary sector, 50% of public service workers were 45 years of age and over, with 40% in construction and 33% in manufacturing. Manufacturing includes several industries particularly affected by a large proportion of workers aged 45 years and over. This is the case for textiles (49%), paper (46%), primary metals (44%), electrical supplies (39%) and clothing (38%).

In the tertiary sector, transport and teaching (46% of workers were 45 years and over), public administration (45%) and health (40%) are facing imminent challenges.

Multiple impacts

This rapid aging of the population, particularly the workforce, naturally has an impact on business and public and para-public organizations.

The equation is simple. The anticipated decline in Quebec's population beginning in 2026, added to the decline in the population of the 15 to 64 year-olds by 2011 and the fact that half the population now retires before the age of 60 – this percentage was 14% in 1976 – means a labour shortage is feared. This is an accepted fact.

PART 3

PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT



Succession planning, first and foremost, requires considering a group of factors which can have an impact on the availability of employees. Succession planning also requires dealing with the issue of the labour shortage in many workplaces, including the community sector. In short, to understand succession we must consider:

- ▶▶ The socio-economic context, or the **external environment**. What are the general factors that must be considered in order to have a grasp of how the labour market is developing and what the future holds? What impact will these factors have on succession, considering that a labour shortage is anticipated? What are the links between this anticipated shortage and succession in the community action arena?
- ▶▶ Each organization's operating method, or the **internal environment**. In taking into account the organizational context, parameters related to succession will be different from one organization to another and from one field of activity to another. We therefore need to know our organization well: what is its management philosophy, its organizational structure, the composition of its workforce and its values? What personnel movements are involved and what is the turnover rate? These elements will allow managers to identify possible solutions in planning their workforce adapted to the specific needs of their organization.

Together, this forms the ENVIRONMENTAL SCAN, which constitutes the foundation for workforce planning, the first stage in succession plan development.

So what are the factors involved in the environmental scan? In the following pages we will present some of them.

QUIZ

QUEBEC WORKFORCE ANALYSIS

TRUE OR FALSE ?

BEFORE LEARNING MORE ABOUT ENVIRONMENTAL FACTORS, WHY NOT TAKE THIS SHORT QUEBEC WORKFORCE ANALYSIS QUIZ? ANSWER TRUE OR FALSE TO THE FOLLOWING QUESTIONS:

| | T | F |
|---|--------------------------|--------------------------|
| 1. There is a correlation between aging of the population and the labour shortage. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Most people who work in community organizations are between the ages of 25 and 34 years. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Throughout the community sector, women represent approximately 80% of the workforce. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. From 1991 to 2001, immigrants accounted for 61% of labour force growth in Quebec. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. More than one out of two people worked full time in the community sector in 2005. | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. The workforce in the community sector is less educated than the general population. | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. 80% of employees in the community sector earn less than \$20 per hour. | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Adjusting for inflation, young Canadian men (15-24) earn approximately 75% of the amount today that men in the same age group earned in the mid 1970s. | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. In 2004, nearly two-thirds of Quebec's labour force was over 45 years of age. | <input type="checkbox"/> | <input type="checkbox"/> |

ANSWERS TO THIS QUIZ CAN BE FOUND ON PAGE 47.

PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT



WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?

THE MALE/FEMALE RATIO

FEMINIZATION OF QUEBEC'S WORKFORCE

Since World War II women have carved out a place in the labour market. Since then, we have seen a continuous increase in the participation of women in the workplace, whether they are wage earners or self-employed. From 1976 to 2003, "the percentage of women who held a job rose from 37.4% to 54.6%, while the rate for men decreased from 70.4% to 65.6%"⁴. The employment rate (see note no. 6) for women in Quebec (55.5%) remained lower than the rate for men (65.3%)⁵.

Another important fact: the labour force participation of women 45 years of age or older⁶ is constantly increasing while the rate for men of the same age is decreasing, thereby contributing to the feminization of the aging workforce⁷. It should be noted that the proportion of women aged 45 to 64 years who have a part-time job is three times greater than for men⁸. We also know that on average, women earn less than men. In 2004, the average hourly wage for women still represented the same proportion as in 1998, being 83.4% of the men's average wage.⁹

A MAINLY FEMALE WORKFORCE IN THE COMMUNITY SECTOR

According to a survey carried out by the *Centre de formation populaire et Relais-femmes*, 80% of the jobs in community organizations are held by women, and only 2% of community organizations reported that they employed no women, while 44% reported that they employ no men.¹⁰

WAGES

LESS COMPETITIVE WAGES, DELAYED RETIREMENT...

A recent Canadian Labour Congress study revealed that young Canadian men (15-24 years) earned only approximately 75% of their counterparts in the same age group in the mid 1970s in "real" or "indexed" hourly earnings.¹¹

In 2003, in Quebec, the average hourly wage (men + women) was \$19.99 for unionized workers, compared to \$15.56 for non-unionized workers, a difference of 28%.¹² Remember that in 2004, the average hourly wage for women in Quebec was 83.4% of the wage paid to men. This difference is even greater in terms of average annual income: in 2002 women earned only 65.2% of their male counterparts' salaries being \$25,300 for women and \$38,900 for men.¹³

This discrepancy can have a significant impact on the availability of workers, particularly when we combine the factors of gender and age. For example, if an organization employs several women over the age of 55, retirements will probably extend over a longer period since they have often accumulated fewer years of service at a lower average wage than that of men. This situation can have a direct impact on the date of retirement. This being said, on the average, women in Quebec retire earlier than men.¹⁴



PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT

WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?

...A VERY CONCRETE REALITY IN COMMUNITY ORGANIZATIONS

Over 80% of the employees of 1354 organizations who participated in a survey carried out by the *Centre de formation populaire et Relais-femmes* earned less than \$20 per hour. One-quarter earned less than \$10 per hour and more than one-third earned between \$10 and \$15 per hour. The average hourly wage in the community organizations that were surveyed was slightly more than \$15. **Table 1** offers additional information concerning wages in community organizations.

A survey of workers in women's groups revealed that 56% of the respondents would accept a position in an institu-

tional environment if it was offered and 53% would accept a job in the private sector.¹⁵ One of the main reasons given was insufficient income (63.2% earned less than \$25,000 per year¹⁶).

Added to these low salaries is the fact that few community organizations (9.7%)¹⁷ have a retirement plan. They are, however, more numerous (35.5%)¹⁸ in offering a group insurance plan.

In the light of this data, a conclusion can be drawn: many women working in community organizations will probably have to remain in the labour market for longer in order to be able to afford to retire.

TABLE 1 Hourly wages by gender

| | < \$10 | \$10 to \$15 | \$15 to \$20 | \$20 to \$25 | \$25 to \$30 | \$30 and + |
|--------------|--------|--------------|--------------|--------------|--------------|------------|
| Women | 24 % | 34 % | 27 % | 9 % | 3 % | 3 % |
| Men | 26 % | 31 % | 26 % | 8 % | 4 % | 5 % |
| Total | 25 % | 32.5 % | 26.5 % | 8.5 % | 3.5 % | 4 % |

Source: *Centre de formation populaire et Relais femmes (October 2005) Pour que travailler ne rime plus avec misère – Enquête sur les avantages sociaux dans les organismes communautaires*. P.41.



- Will the wage issue have an impact on succession in community organizations?
- If so, do community organizations have the tools necessary to measure and counteract this impact?
- Could late retirements have an impact on the workforce? For example, could it be considered a barrier for youth interested in their advancement?

PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT



WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?

EMPLOYMENT STATUS

IN QUEBEC, MOST PART-TIME WORKERS ARE WOMEN...

According to a survey carried out by the *Institut de la statistique du Québec*, "the proportion of part-time workers is much lower among those aged 25-64 years than among youth from 15 to 24 years. In fact, in Quebec, in 2003, 13.2% of those aged 25-64 years worked part-time compared to 45.0% among youth. The proportion is fairly stable among the 25-54 year-old group and increases at the age of 55 years, a practice that is probably most often desired with a view to a final retirement from the labour market."¹⁹

More men work full-time than women in Quebec (54.5% and 45.5% respectively)²⁰. According to a study by the *Comité aviseur femmes en développement de la main-d'œuvre*, women are over-represented in part-time jobs²¹ and this situation has remained stable since 1991 (67.5% in 1991 and 67.8% in 2003).

A look at the distribution by employment status allows a better understanding of the distribution between permanent and contractual personnel. It should be noted that, contrary to what we have been led to believe, employees do not necessarily prefer occasional employment. Being able to rely on work-family reconciliation measures and flexible hours does not mean that employees want a contractual status.

...THIS IS SOMEWHAT DIFFERENT IN COMMUNITY ORGANIZATIONS

According to a survey carried out by the *Centre de formation populaire et Relais-femmes* (see Table 2 on page 19), "69% of the jobs in the community sector are permanent, 26.1% are temporary and 5.3% are contractual (independent worker)."²² Women and men share the full-time positions more or less equally, but women are more numerous in the part-time positions.

According to research carried out by the *Université de Sherbrooke*²³, most workers (55.7%) have a contract of an undetermined length (which can be associated with a form of permanence), while 18.5% have contracts for less than one year. This being said, "contracts for less than six months [are] four times more frequent among workers under the age of 24 years than among those over the age of 45."²⁴

This information is important, particularly when considering attracting and retaining employees.



PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT

WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?

TABLE 2 Distribution of women and men in community organizations,
by employment status

| | Permanent Full-time | Permanent Part-time | Temporary Full-time | Temporary Part-time | Independent Worker |
|--------------|---------------------|---------------------|---------------------|---------------------|--------------------|
| Women | 50.8 % | 18.9 % | 12.4 % | 13.2 % | 4.7 % |
| Men | 52.6 % | 11.7 % | 16.5 % | 11.8 % | 8.5 % |
| Total | 51.1 % | 15.5 % | 13.2 % | 12.9 % | 5.3 % |

Source: Centre de formation populaire et Relais femmes (October 2005) *Pour que travailler ne rime plus avec misère – Enquête sur les avantages sociaux dans les organismes communautaires*. P.37.



- Is it possible to statistically demonstrate that an employee's status has a direct impact on departures in the community sector? What happens when low wages and precarious status are combined?
- In what way could these departures have an effect on succession?
- Have community organizations targeted contractual employees who could eventually become permanent employees? If so, what measures could be implemented to retain them?

PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT



WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?

EMPLOYEE EDUCATION

A WORKFORCE THAT NEEDS MORE AND MORE EDUCATION...

The qualifications required for jobs have changed radically. Jobs are increasingly more specialized. The profile of the new workforce has changed. An eloquent example: during the 1990s, “almost all labour force growth in Montreal corresponded to a strong demand for qualified workers. Over 80% of the increase came from university-level professions and one-third of these professionals were in the information technology sector.”²⁵ In 2003, 57.4% of the jobs in Quebec were held by employees with a post-secondary diploma or university degree²⁶. Technological change require workers to be flexible, able to adapt and to acquire new skills throughout their professional life.

It should be noted that for the past few years, women have made up the majority in all educational institutions from secondary school to undergraduate programs.²⁷

In this context, unspecialized workers or those with little education risk experiencing increasing difficulty in finding employment. The knowledge-based economy poses many challenges, one of the most important concerns being an incumbent's qualifications. Demands for both managers and non-management employees have changed as never before, considerably altering the skill profiles sought by businesses.

...THIS IS ALREADY A REALITY IN COMMUNITY ORGANIZATIONS

This fact is fairly obvious: workers in the community sector have higher levels of education than those in other employment sectors. Compared to the Quebec labour force aged between 25 and 34, more employees in the community sector have a bachelor's degree (35.2% compared to 21.9%), and 84.3% of workers in the community sector aged between 25 and 34 have a post-secondary diploma or degree compared to 54.7% for Quebec's labour force overall.



PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT

WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?

TABLE 3 Comparison of the level of education of community workers and the general population

| | | Less than 25 years | 25 to 34 years | 35 years and over |
|-------------------------|----------------------------------|--------------------|----------------|-------------------|
| Community sector | Secondary school diploma or less | 27.3 | 15.7 | 33.5 |
| | College diploma | 48.8 | 41.2 | 28.5 |
| | B.A. | 22.8 | 35.2 | 31.9 |
| | M.A. or Ph.D. | 1.2 | 7.9 | 6.0 |
| | (Total: N = 4801) | 100% | 100% | 100% |
| The entire labour force | Secondary school diploma | 74.7 | 45.3 | 71.6 |
| | College diploma | 20.2 | 27.6 | 14.1 |
| | B.A. | 4.8 | 21.9 | 10.1 |
| | M.A. or Ph.D. | 0.3 | 5.2 | 4.2 |
| | (Total: N-6 429 660) | 100% | 100% | 100% |

Source: Table taken from: Deschenaux, Frédéric (2003). *Choisir, subir, s'ajuster : la place des milieux communautaires dans l'insertion professionnelle des diplômées et diplômés du post-secondaire*. Doctorate dissertation, Faculty of Education: Université de Sherbrooke, p.342. Data sources: *Collective de recherche sur les occupations*. (2002). *Résultats de la deuxième phase du projet CRSH*. Unpublished data. Sherbrooke: Université de Sherbrooke and Statistics Canada (2003).



- Could the community workers' high level of education have an impact on creating a succession?
- Since they have more education, and often more experience, do community workers not risk being courted by public and para-public employers following the retirement of the baby-boomers?
- Are these educated and experienced community workers not likely to voluntarily make the jump in large numbers to the public and para-public sectors?

PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT



WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?

AGE GROUPS?

THE AGING WORKFORCE

In Quebec, the age pyramid is in radical change and the population is aging rapidly. In addition to aging of the baby-boomers, the declining fertility rate and spectacular increase in life expectancy explain this phenomenon. From now on, not only will the number of those aged 65 and over and retired workers grow, but the so-called aging labour force will also increase significantly.

In 2001, the average age of the labour force in Canada was 39, compared to 37.1 in 1991.²⁸ In 2004, 61.2% of the Quebec labour force was over the age of 35 (compared to 43.1% in 1976); 35.4% were over 45²⁹. It is estimated that by 2008, there will be only four potential employees entering the labour market for five potential departures.³⁰ If this trend continues in the short and medium term, it will no doubt result in numerous departures as workers retire. The situation is of even more concern in rural areas. Young people are increasingly leaving their regions for the urban centres, thereby accelerating aging of the rural population.³¹

Another sign of aging of the labour force: between 1984 and 2004, the share of jobs held by the 45 to 64 year-old group increased from 23.5% to 36.1%, while the proportion of jobs held by the 15 to 34 year-old group decreased from 51.3% to 36.6% during the same period.³² According to certain demographic scenarios, having dropped from 40% to 24% between 1971 and 2001, the proportion of youth in the total population will be no more than 19% in 2026 and 17% in 2051.”³³

We also know that a certain portion of retired workers are employed today.³⁴ The effect of this new reality may not slow down aging of the labour force, but could reduce the negative impacts related to labour shortages over the next few years.

...THIS IS ALSO THE CASE IN COMMUNITY ORGANIZATIONS

The labour force, along with the general population, is aging: This is evidently also the case in the community sector. Many managers and professionals are 50 years of age or over today. It should also be noted that a number of them are also the founders of the organizations to which they have devoted a good portion of their professional and activist life.

The statistics in Table 4 (see page 23) indicate that “even though there is still a significant number of young employees in these groups, their presence is tending to decline, giving way to the relative aging of the workforce in this sector.”³⁵

This data allows us to estimate the risk of retirements, take action to ensure the transfer of knowledge and plan for succession. To do so, we must obviously take into account the diversity of the organizations in the community action sector.

Since wages are generally lower in community organizations than, for example, in the public sector, people who make their career in the community sector cannot usually plan an early retirement from the working world – particularly since we know that few organizations offer a retirement plan.³⁶

Activism will also have an impact on the age structure. People who champion a cause are less interested in leaving the organization, and tend to age with it.



PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT

WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?

TABLE 4 **Distribution of employees of community groups by gender and age category**

| | Less than 25 years | 25-34 years | 35-49 years | 50-64 years | 65 years and over |
|-------|--------------------|-------------|-------------|-------------|-------------------|
| Women | 16.2% | 26.0% | 39.9% | 17.2% | 0.8% |
| Men | 17.1% | 25.0% | 38.0% | 19.0% | 1.0% |

Source: Centre de formation populaire et Relais-femmes (October 2005). *Pour que travailler ne rime plus avec misère – Enquête sur les avantages sociaux dans les organismes communautaires*. P.36.



- Is the community sector going to face succession difficulties similar to those observed in other sectors of activity?
- Is aging of the workers a greater threat to community organizations than to other sectors?
- Are community organizations “competitive” in terms of the general conditions of the labour market?
- Does the community sector have advantages, distinct characteristics which, skilfully used, could become important assets compared to the rest of the labour market?

WHAT DO YOU THINK?

The labour market:

Differences from one generation of workers to the next

Due to a certain division between generations, new values and attitudes emerge in the working world and influence human resources management approaches. **WHAT DO YOU THINK?**

| Generation | Date of birth | Values in the workplace |
|----------------------------|---------------|---|
| Children of the millennium | 1996 to 2010 | Familiar with Information and Communication Technologies (ITCs) |
| Generation "I" (Internet) | 1980 to 1995 | Quality of life Independence and autonomy Seeks new challenges More demanding and better informed Immediacy Scepticism Tolerance and social openness |
| Generation "Y" | 1967 to 1979 | Facility with ITCs Respects authority if competent |
| Generation "X" | 1961 to 1966 | Quality of life Independence, autonomy Seeks new challenges Immediacy Demanding and well informed Scepticism regarding employers |
| Baby-boomers "BB" | 1946 to 1960 | Reticence concerning ITCs Loyalty to the organization |
| War babies "WB" | 1940 to 1945 | Respects authority Quality of life Seniority and job security Seeks professional success |
| Seniors | 1919 to 1939 | Work Aware of the value of money Respects authority Organizational loyalty Optimistic about the future Moral obligations and sense of duty Strongly moulded by the system |

This survey was carried out according to the classification and profile of generations by five researchers specializing in the field and more particularly based on groupings presented by David Foot. Foot, David (with Daniel Stoffman) (1996). *Entre le Boom et l'Écho: Comment mettre à profit la réalité démographique*, Montreal, Les Éditions du Boréal. Foot, David (with Daniel Stoffman) (1999) *Entre le Boom et l'Écho 2000 : Comment mettre à profit la réalité démographique à l'aube du prochain millénaire*, Montreal, Les Éditions du Boréal.



PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT

WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?

YEARS OF SERVICE?

THE IMPORTANCE OF BEING ABLE TO COUNT ON EXPERIENCED EMPLOYEES...

A combination of an employee's age and the number of years of service has an influence on the amount of knowledge he or she has accumulated over the years. This is what we mean by "experienced" employees. When an experienced employee leaves, transferring knowledge becomes a priority, if not a major strategic issue.

Most resignations of employees who have more than 15 years of service send a different message than if they were new employees. In the latter case, it may be appropriate to review employee orientation and integration structures. When it comes more tenured individuals, we could see it as an indication that the workplace no longer meets their expectations.

... A COMMON REALITY IN THE COMMUNITY SECTOR

The data in Table 5 reveals that "community sector employees generally have fewer years of experience in the same organization." In fact, "more than one-quarter (27.9%) have less than one year of seniority."³⁸ Close to one-quarter have more than five years of experience.

When we combine this data with the results of the work of other researchers, it is clear that there is a relatively high rate of turnover in community organizations (a rate which however remains to be compared with other sectors). For example, in 2002, in women's centres in Montreal, close to two-thirds of the workers had less than five years of experience in the organization.³⁹ According to a survey carried out in 2000 among organizations in the health and social service sector, 57.2% of the workers had less than three years of seniority.⁴⁰

TABLE 5 **Distribution of women and men in community organizations,
by the number of years of seniority**

| | - 1 year | + 1 year | + 2 years | + 5 years | + 10 years | + 15 years |
|--------------|--------------|--------------|--------------|--------------|-------------|-------------|
| Women | 26.9% | 25.9% | 23.5% | 13.23% | 5.9% | 4.6% |
| Men | 31.7% | 25.2% | 21.7% | 11.2% | 5.7% | 4.5% |
| Total | 27.9% | 25.8% | 23.1% | 12.8% | 5.9% | 4.6% |

Source: Centre de formation populaire et Relais-femmes (October 2005). *Pour que travailler ne rime plus avec misère – Enquête sur les avantages sociaux dans les organismes communautaires*, p.40.

PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT



WHAT IS THE SITUATION IN YOUR REGION? IN YOUR ORGANIZATION?



- These figures certainly raise some questions. If the transfer of knowledge and continuity is mainly up to the organization's coordinators, this is important information because it is precisely these employees who will be retiring in the near future. What is the situation in your organization?
- What is the turnover rate for personnel in your organization? Is it comparable to other sectors, non-profit or not?
- Has your organization identified:
 - Succession candidates, that is individuals who, due to their qualifications, knowledge and personal qualities, could take on a more senior position in the organization?
 - High-profile candidates, that is individuals who, due to their qualifications, knowledge and personal qualities, represent a sure advantage for the organization and whose presence make a difference to the organization?
- Does your analysis show that your organization has enough succession candidates to meet your labour needs for the next three years? If so, what measures do you need to introduce to ensure the development of the qualifications they will require? If not, what can be done to remedy the situation?
- What about employee turnover in community organizations?
- Will a possible labour shortage accelerate the problem, making it more difficult to retain employees?
- Has your organization ever considered introducing a succession plan? If so, what are its objectives? Is it clear for the entire work team?

PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT



IN REGARDS TO YOUR REGION, HAVE YOU EVER WONDERED ABOUT...

GEOGRAPHIC MOBILITY AND ITS IMPACT ON THE AVAILABLE LABOUR POOL

Inter-provincial migration

The migratory situation between provinces is alarming. Since 1972, Quebec has clearly lost residents to other provinces. Census data for 2001 confirm this trend⁴¹ which results in a gradual loss of a portion of the labour force and, naturally, reduces the recruitment pool.

Inter-regional migration and unemployment rates

Migration between regions in Quebec varies depending on the economic situation in the regions, job possibilities and the individual's career choice. We note a direct relation between migration and high unemployment rates.

From 1996 to 2003, the unemployment rate in Quebec dropped from 12.1% to 9.2%⁴² (it was 8.6% in 2006⁴³). The unemployment rate can vary a great deal from one region to another. For example, in 2004, it was 6.4% in Chaudière-Appalaches and 19.5% in the Gaspé and Magdalen Islands. Among the seven administrative regions in Quebec which, in 2004, had an unemployment rate higher than the provincial average (8.5%), six also had negative migration rates (the sole exception was the Montreal area)⁴⁴.

A POSSIBLE DEMOGRAPHIC DEFICIT

Population growth is distributed in an unequal manner depending on the region studied. It is generally agreed that remote regions lose their population to urban areas and their periphery. In the data consulted, this trend seems to be confirmed. From 1991 to 2004, the following regions experienced an increase in their general population: Outaouais (+16.2%), Laval (+13.3%), Lanaudière (+20.3%), Laurentians (27.7%). On the other hand, during the same period, the populations of Abitibi-Témiscamingue, the North Shore and Gaspé-Magdalen Islands decreased by -6.5%, -8.3% and -10.4% respectively⁴⁵. If this trend continues, it is estimated that by 2026, the six following regions will have experienced 25 years of demographic decline: Gaspé-Magdalen Islands, North Shore, Abitibi-Rémiscamingue, Saguenay-Lac-Saint-Jean, Lower St. Lawrence, Mauricie⁴⁶.

UNEMPLOYMENT AND JOB RATES AND THEIR CONSEQUENCES ON THE AVAILABILITY OF LABOUR

Quebec's labour market conditions have changed since the beginning of the new millennium. The unemployment rate, which remained above 10% during the 1980s and 1990s, dropped below 10% at the beginning of 2000⁴⁷ and has remained fairly stable since. From 2003 to 2008, an average rate of job growth of 1.4% per year is predicted for Quebec. Employment in the tertiary sector (1.6%) is, nevertheless expected to increase as much as twice as rapidly as the secondary sector (0.7%).⁴⁸

The unemployment rate is an important indicator in estimating the availability of labour. However, even if the unemployment rate is 9%, there could still be a shortage, particularly in terms of qualified workers.

The employment rate⁴⁹ has experienced solid growth, particularly among so-called "older" workers (another sign of aging of the active population). From 1984 to 2004, the employment rate for the 45 to 54 year-old group increased from 61.3% to 78.3% (+17%), while this difference was only +10.8% for persons aged 35 to 44 years (70.1% in 1984 and 80.9% in 2004)⁵⁰. From 1999 to 2004, the employment rate increased in all regions of Quebec. It was, however, generally higher in urban areas than in the so-called marginal areas.⁵¹

It should also be noted that from 2003 to 2008, 60% of job growth will be created by "replacing persons who are leaving the labour market", a trend "which will only intensify over the next few years due to aging of the population."⁵²



PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT

IN REGARDS TO YOUR REGION,
HAVE YOU EVER WONDERED ABOUT...

THE CONTRIBUTION OF NEW ARRIVALS IN THE LABOUR MARKET

In comparison to the total population of Quebec, the percentage of immigrants rose from 5.6% in 1951 to 9.9% in 2001.⁵³ In Quebec, from 1991 to 2001, immigrants accounted for 61% of growth of the active population, compared to 97% in Ontario.⁵⁴ One reason for this is the fact that Ontario has been the first choice of immigrants for the past 30 years: 55.6% of all immigrants have settled there, compared to 13% in Quebec and 19% in British Columbia.⁵⁵ It should be noted that 45.4% of immigrants to Quebec between 1993 and 2002 had over 14 years of education (20.2% of whom had over 17 years).⁵⁶ In spite of this level of education, their integration on the labour market is nevertheless difficult. In 2001, the unemployment rate of the immigrant population in Montreal was 12%, practically double that of the non-immigrant population (6.2%).⁵⁷

THE POLITICAL AND LEGISLATIVE ENVIRONMENT

Changes in government can be accompanied by changes on the political, strategic and legislative levels. Government orientations change depending on the economic and social situation. This can lead to new priorities, new policies, new laws. All these factors have an impact on organizations and at different levels.



- Is there a decline in the population of the region where your organization is located?
- Has it had an impact on your hiring practices and preparing for succession?
- Has your organization ever considered hiring immigrants as a part of its succession strategy?
- Is your organization located in a region with a low unemployment rate? If so, is hiring difficult and, consequently, succession?

PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT



IN YOUR ORGANIZATION, HAVE YOU EVER WONDERED ABOUT...

THE MOBILITY OF CERTAIN WORKERS

In this case, we are referring to employees who are under the age of 35 years and who change their job every three or four years. This data indicates the efforts that must be made to retain these workers, particularly if they are identified as “succession” candidates.

THE “VULNERABILITY” OF CERTAIN POSITIONS

The vulnerability of positions in an organization can be identified using the following criteria:

- **Very specific skills** are required: the difficulty in filling a position may be directly proportional to the qualifications required. Some organizations have individuals in their ranks who acquire specialized skills that are not common in the labour market. In this case we are referring to skills that go beyond the diploma usually related to a job title.
- A **long apprenticeship**: we often forget that certain positions require a period of learning and integration that is much longer than is generally reflected in the job title.
- **Difficulties related to recruitment**: in a highly competitive environment (as is the case now), it is not unusual for organizations to recruit the employees they need from other organizations. And the better these organizations’ reputation is, the more likely they are to be solicited.

Adding the variable “employee status” also has an impact on the vulnerability of the position. For example, if key positions are occupied by individuals who have an occasional employee status, the situation is more critical than if employees are permanent.

STRATEGIC PLANNING

The strategic plan is a valuable reference document for any organization that is considering implementing a succession plan. It allows the organization to clarify its orientations so as to evaluate the impacts on the composition of the workforce and on the qualifications required. This document also contains the main features of the environmental scan.

THE BEST MANAGEMENT MODEL

The **management model** includes all the organization’s activities: organization of work, financial resources, relations with partners, material resources, etc. It also includes the manner (rules and values) in which the organization coordinates all its activities in order to fulfill its mission.

The management model must reflect the organization’s action principles. In the case of community action and social economy, these principles can be summarized as follows:

- ▶ To improve the living conditions of the population through services, products, support of all types or actions to recognize and defend rights in order to create a better society;
- ▶ To facilitate *empowerment* by permitting communities of individuals to choose, decide and act on their living environment;
- ▶ To work for the broader public benefit (including social justice, solidarity, etc.).

At this level, community organizations have a head start compared to other sectors of employment. This could be a strength in attracting employees.



PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT

IN YOUR ORGANIZATION,
HAVE YOU EVER WONDERED ABOUT...



- Will the positions identified as being vulnerable still be so in three years? Why? Are there other positions that might also become vulnerable?
- Do you already have employees who have the potential to occupy these vulnerable positions? Are these persons interested in these positions?
- What factors should be considered in evaluating the vulnerability of positions and the individuals who make up your organization?
- In small organizations, there are often “unique” positions. If this is the case, have you already identified a replacement for these positions?
- Has the person occupying a unique position been targeted as being a succession candidate for the organization?
- Can the organization change the structure of this “unique” position to ensure the candidate is retained?

>> **What are the VULNERABLE positions in my organization?**

PLANNING FOR SUCCESSION TAKING MANY FACTORS INTO ACCOUNT



**IN YOUR ORGANIZATION,
HAVE YOU EVER WONDERED ABOUT...**

EMPLOYEE TURNOVER

Employee turnover includes departures and long-term leaves. In both cases, the organization must plan to replace the employee, an additional element to consider when considering succession during a period when labour is scarce.

Departures may be due to a number of reasons: retirement, protective reassignment, internal mobility (in the case of the community world, we can extend the concept of internal mobility to a new position in the same sector of activity, but in another organization), and resignations. As for leave, long-term or not, it may be due to the birth of a child (maternity or paternity leave), illness, studies, a sabbatical, etc.



- Which functions, which operations do the anticipated departures affect?
- Are there positions where the employee (having resigned, taken a leave, etc.) will not be replaced? Are certain positions at greater risk than others?
- How many years of services does the coordinator have? If he/she is close to retirement, what has been planned for his/her eventual departure?
- To what extent can a resource from outside the community world be integrated successfully?



WHAT DO YOU THINK?

MULTIGENERATIONAL WORKPLACES

For the past few years, managers have been particularly concerned by “age management” in their organizations, or what others also call managing inter-generational workplaces. After a long period of “hiring freeze”, organizations are recruiting again with the effect that the average age of the workforce is being rejuvenated. This means that the age/employee ratio becomes particularly significant.

THE SO-CALLED “AGING” WORKFORCE (50 years and +)

Statistics Canada and the *Institut de la statistique du Québec* still define the aging workforce as being between “45 and 65 years”. According to this logic, we are “old young” and will remain “old for a long time”! In fact, it would be more accurate to refer to the “experienced workforce”. This being said, prejudice toward this aging workforce is tenacious: slower therefore less productive; unable to adapt to new technology; less capable of learning; often absent; etc.

“When older workers leave the labour market, they take with them a considerable sum of knowledge and valuable experience, which, in large part, is essential to the effective operation of their organization.”⁵⁸

THE “SANDWICH” GENERATION (35-49 YEARS)

Employees in the 35-49 year-old group are often the most numerous in our organizations. This group also has the greatest potential to take over tomorrow; however, it is also this age group, and particularly the women in it, that have the highest rate of long-term disability leave due to burn-outs.

This age group is referred to as the “sandwich” generation, the one that has to combine professional life and caring for children and aging parents.

RECONCILIATION OF WORK-FAMILY, AN ASSET FOR THE COMMUNITY SECTOR

The challenge of reconciling work and family is open to innovation: organizing hours of work, leave, day-care in the workplace, career paths adapted to family demands, etc. Personalized management takes on a special significance; each situation is different.

Certainly, there has been some progress over the past few years, but it must be noted that work / family reconciliation could have made more advances than it actually has today.

Reconciling work and family is an objective pursued by most community organizations. In fact, it is one of the aspects of the quality of life at work that they defend most ardently.



MANAGING SUCCESSION

CONSIDERING THE **YOUNG...** AND THE **LESS YOUNG**

In the face of an increasingly competitive labour market and significant shortage of experienced personnel, organizations are looking for conditions they can introduce to **attract and retain** the most qualified human resources in all levels and categories of employment.

Certainly, the employees' motivation and satisfaction of is one of the factors to be considered. However, to understand all the ins and outs, we need far more than a few theories or models loaned from organizations here and there. Several factors must be considered depending on the environment in which the organization operates: the organizational ambience, working conditions, strategies to mobilize the human resources, etc. There are tens, if not hundreds of possible solutions.

In this last section, you will find several **POSSIBLE IDEAS** for alternatives available to organizations in terms of their succession.

>> WHAT DO YOU THINK?

ORGANIZATIONAL SHORTAGES IN THE COMMUNITY SECTOR

In the light of the preceding information, it appears that community organizations will, first and foremost, have to deal with an **organizational shortage**. In other words, how can they attract and retain quality employees when human resources are rare and the competition is lively.

Elements such as compensation, working conditions, the possibilities for mobility and advancement, job security, balance between work and family, training possibilities, job satisfaction and employee valorization can influence an organization's ability to attract and maintain employees and inspire them to stay.

In contrast to private enterprise and certain public organizations, it is not so much the values and management philosophy that are in question, but rather compensation and job security in community organizations.

Under-funding of community organizations (with the corresponding low salaries and high rates of employee turnover) and job security have preoccupied the sector for over 20 years. So, why are we particularly concerned today?

Simply because the working world has literally been transformed from an "employers' market" to an "employees' market". In the 1980s and 1990s, for a certain category of workers, community-based organizations offered a foundation from which they could begin to carve out a place for themselves in the labour market. Tomorrow, the reality may be quite different.

At the least, this is one of the main conclusions of a study carried out by the Canadian Policy Research Networks. Noting the strong presence of women in Canadian non-profit organizations, the authors of this study state that:

Available surveys reveal that many of them [female employees in NPOs] have a great deal of experience [...]. Employers in the para-public and public sectors tend to employ people who have the same characteristics. Accordingly, in the years to come, employers in the non-profit sector will probably have to compete with employers in the public and para-public sectors to recruit personnel from the same labour pool.⁵⁹

We must not exclude possible quantitative and/or qualitative shortages in community-based organizations; however the risk is more severe in remote regions than in the main urban centres.



MANAGING SUCCESSION CONSIDERING THE YOUNG...AND THE LESS YOUNG

CREATING A SUCCESSION...WITH YOUNG EMPLOYEES

Community organizations seem to be able to offer jobs that meet the expectations and values expressed by young people today: stimulating work, diverse duties, an environment that promotes creativity and innovation, flexible schedules, diversity in the work team, work-family reconciliation.⁶⁰ What is more, these young people seem to be attracted by the principles of democratic life and the more flexible management approaches that are generally associated with community organizations.

This issue of the intrinsic values of community-based organizations was also revealed in a survey of young community workers. The young employees who were interviewed considered that it was:

Important to be able to see the impact of the tasks they accomplish, [...] the result is a satisfying and long-lasting impression. Young people also appreciate having the opportunity to work with people from diverse cultures and identities. The most important aspects of their ideal job (in no particular order): stimulating work, diverse duties, environment that promotes creativity and innovation, recognition [...], flexibility (working conditions, hours), possibility of advancement and coaching, consistency between organizational and personal values, the presence of people from different backgrounds, good salary (this point was not mentioned first), good retirement plan and fringe benefits, job security, possibility of reconciling personal and professional life.⁶¹

In terms of succession, it is also important to note that, according to Deschenaux' qualitative analyses, "the way in which workers have entered community-based organizations becomes the cornerstone of understanding the position occupied by these environments in the professional integration of graduates."⁶² In other words, persons who make their "career" in community-based organizations do not all do so for the same reasons. Deschenaux identified six types of community workers which correspond to as many reasons for being drawn to, remaining in... or leaving a community organization.

1) Activists; 2) Drop outs; 3) Experienced workers: Presence in community organizations is chosen and planned.

4) The converted: Presence in community organizations is chosen, but not necessarily planned;

5) The compelled: the professional path is chosen but working in the community is not the person's first choice;

6) Surfers: community work is not chosen or planned; the person simply finds events lead him/her there.



QUESTIONS FOR COMMUNITY ORGANIZATIONS

Does your organization correspond to the following statements?

DOES YOUR ORGANIZATION...

| | YES | NO |
|---|--------------------------|--------------------------|
| Consider employees as the most important resource and recognize its collective qualifications and contribution? | <input type="checkbox"/> | <input type="checkbox"/> |
| Place a value on the knowledge, ideas and achievements of each employee and encourage upgrading training? | <input type="checkbox"/> | <input type="checkbox"/> |
| Promote team work, cooperation between the employees and show confidence in the staff? | <input type="checkbox"/> | <input type="checkbox"/> |
| Promote a policy of job equity? | <input type="checkbox"/> | <input type="checkbox"/> |
| Encourage open and direct communications? | <input type="checkbox"/> | <input type="checkbox"/> |
| Welcome ideas and suggestions from employees and others (trainees, instructors and guest researchers)? | <input type="checkbox"/> | <input type="checkbox"/> |
| Ensure the physical and psychological integrity of its employees and partners? | <input type="checkbox"/> | <input type="checkbox"/> |
| Promote participative management and encourage creativity? | <input type="checkbox"/> | <input type="checkbox"/> |
| Provide the personnel with the tools they need to carry out their duties? | <input type="checkbox"/> | <input type="checkbox"/> |
| Seek to manage all its resources in the best possible manner? | <input type="checkbox"/> | <input type="checkbox"/> |
| Introduce a support mechanism to implement and carry out the management philosophy? | <input type="checkbox"/> | <input type="checkbox"/> |

Source: CHSLD Le Trifluvien, adaptation of the document *Philosophie de gestion*



MANAGING SUCCESSION CONSIDERING THE YOUNG...AND THE LESS YOUNG

CREATING A SUCCESSION...WITH THE LESS YOUNG

Retirement has always depended on the needs of the job market, a social phenomenon that adapts to the socio-economic environment. Since this environment has changed considerably over the past few years, we now place a value on retaining employees, while during a recession, early retirements are encouraged.

In other words, it appears to be time to introduce measures to retain the aging workforce. According to two university researchers⁶³, this requires certain conditions. We must:

- ▶ Offer flexibility in terms of retirement
- ▶ Develop personalized agreements reconciling the employees' expectations in regard to the end of their career and organizational needs
- ▶ Recall retired employees
- ▶ Plan for succession according to qualifications and not job titles (thereby setting the age factor aside)

It should be noted that gradual retirement approaches are gaining popularity and, contrary to what might be expected, this measure has appeared in several collective agreements since the early 1990s. It has become an interesting option for organizations as we deal with labour shortages and aging of the labour force. It allows us to keep employees who would have retired early on the job (even part-time) and, thereby, allows the transfer of knowledge before the official departure.

**Over 300 000
Canadians who are
65 years or over
work on a daily
basis and 17% of
them are aged
between 75 and
80 years.**⁶⁴

Recalling retired employees and reintegrating experienced employees must be considered according to the increase in the number of retired employees, their age and their life expectancy. Thus, during the 1970s, the length of a retirement stood around seven years, from 65 to 72 years. Today, people hope to retire at 55 and life expectancy is approximately 82 years (at least for women)⁶⁵. Accordingly, many people may be retired for 27 years. It should also be noted that the number of retired employees increased significantly between 1979-1983 and 1999-20003.⁶⁶

In this context, can we consider recalling these retired workers – particularly those from the public health and social service network – to meet succession needs? A question which bears considering, particularly in order to ensure that this target group has skill profiles that are suitable for community-based organizations.

This being said, for an organization that needs to retain jobs for older employees, one of its priorities must also take into account the fact that, according to certain studies, retirements will occur later in the years to come, mainly due to insufficient retirement funds.⁶⁸

In a recent CROP survey, we learned that “72% of the employees who currently retire early intend to continue to work after their retirement”.⁶⁷



LABOUR SHORTAGE

ANOTHER “WAKE UP CALL”

POUR UN QUÉBEC LUCIDE (for a competent Quebec) AN ANALYSIS OF THE IMPACTS OF THE DECLINING POPULATION

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(Translation)

Le Devoir, Friday, October 28, 2005

In the manifesto, *Pour un Québec lucide*, the signatories brandish the spectre of the declining population. They go as far as to say that our future is threatened by the decreasing population, that its consequences will be a substantial increase in expenses and reduction of revenues for the State to the extent that Quebec's economic growth will be cut in half by the next decade. Faced with this appeal for Quebecers to be more realistic, certain clarifications must be made.

The population of Quebec continues to increase at the moment and is expected to do so for the next 25 years, according to the reference scenario of the *Institut de la statistique du Québec*. Certainly the population is increasing less rapidly than in the past, but there will, nonetheless, be 700 000 more people in Quebec in 2031 than in 2001.

The decline in the population anticipated after 2031 is not related to the fact that women today have fewer children than before, but to the fact that between 1945 and 1965, the baby-boom years, women had a relatively large number of children. In fact, the decline in the population anticipated after 2031 is basically related to the fact that the baby-boomers will die: those born in 1945 will be 85 years old in 2031. Even in 2051, when practically all the baby-boomers will have disappeared, the population of Quebec will still be larger than it is today, that is 400 000 people more than in 2001.

Around 2031, the relative proportion of persons from 20 to 64 years, or of “working age”, will obviously be lower than it is today. However, it is quite incorrect to imply that there will be more “dependent” people than today and fewer persons who contribute to the public finances.

Who works?

During the next 25 years, the population of Quebec will continue to increase. This means that when all cohorts of the baby-boom have reached retirement age, there will be almost as many “active” workers as today. In 2026, the number of people between the ages of 20 and 64 years will be 4 568 000, a decline of only 2% (or close to 100 000 people) compared to 2001.

At the moment, not everyone in this age group is employed. In 2004, a large pool of over 1 250 000 people were unemployed or not in the labour force. Many of these individuals work when there is work. We forget that the rate of unemployment in Quebec, which is still relatively high (8.5% in 2004), is mainly explained by the lack of jobs and not by structural problems in the labour market or a labour shortage. For example, if all positions that have been vacant for four months or more were filled, the unemployment rate in Quebec would drop by only a mere 0.5%.

To finance public expenditure, the important thing is not that there will be as many persons between the ages of 20 and 64 years in 2026 as in 2001, but that there will be relatively as many persons who are employed. It is mainly through employment that the province collects income and other taxes and social contributions.

(article continues on page 46)

LABOUR SHORTAGE ANOTHER “WAKE UP CALL” (Cont.)



In 2001, 47% of the population of Quebec was employed. In order for this ratio to be maintained in 2026, 3 825 000 people out of a population of some 8 100 000, or only 140 000 more people will have to be employed than in 2004 over a 20-year horizon. This is little when we consider that 300 000 people have joined the labour market over the past four years.

In general, since the labour pool is sufficiently large and is not employed at its full capacity, there is no reason to justify the claim that on the retirement of the baby-boomers, there will be relatively fewer people who work and thereby contribute to the public finances, unless companies themselves require fewer workers.

In the end, the question to be asked is perhaps the following: **what does such an alarmist scenario hide about the declining population?**



The first step for a community organization that wants to deal with the issue of succession is to clearly identify the environment in which it operates – and will operate - over the next few years. In fact, it means identifying the factors that will influence the organization, evaluating their impacts on the labour force and deciding what measures must be taken to reduce the organization's vulnerability. These factors are two-fold:

- **The external environment**, that is the general socio-economic context: unemployment rate, labour market, education, political and legislative environment, migration, immigration, etc.
- **The internal environment**, that is the way in which the organization functions: working conditions, composition of the staff (gender, age, status), personnel movements (departures and long-term leaves), vulnerable positions, organizational structure, etc.

Certainly, this is a long-term process which will result in a myriad of sub-questions, all of which are equally pertinent. For example, consider the wage issue: generally lower in community organizations. Can this have an impact on succession? If so, do community organizations have the tools required to measure this impact and counteract it? Is there a relationship between staff turnover and low wages? And what about the fact that these low wages are often linked to jobs that are less secure, since part-time and temporary contracts are common in community action?

While considering the region in which it is located, every organization must also question the impact that geographic mobility may have on the availability of human

resources; fluctuations in the unemployment rate; and levels of education now required on the labour market. In this regard, being more educated and often more experienced, do community workers not risk being solicited by employers in the public and para-public sectors following the retirement of the baby-boomers?

This overall portrait must lead each organization to ask who, during a labour shortage, could fill positions that are becoming vacant. Younger people? Older people? Immigrants? This portrait could also shine light on the fact that of the three types of shortage (qualitative, quantitative and organizational), organizational shortages will possibly be of most concern for community organizations (that is the ability to attract and retain that each organization has compared to the overall labour market).

Other questions remain. Could the relative absence of a hierarchy and the possibility of carrying out multiple tasks in a community organization be considered sufficient factors to attract and retain workers? Often perceived as a place of passage where young people can acquire solid working experience "in the field", will the community sector be able to retain this role during a labour shortage? With the shortage announced in public and para-public sector jobs, will young people not simply tend to avoid this passage in community organizations? Or, will this passage simply become shorter, since the community sector is recognized for its capacity to serve as a training ground?

CONCLUSION



In other words, in the current context, without examining the issue more deeply, it is difficult to answer the question of whether there will be a shortage of human resources in community organizations with the resulting difficulty in managing succession. Some indicators seem to suggest that this will be the case. Others, including the consistency between the values inherent in the community sector and the professional aspirations of the upcoming generation (initiative, flexibility, constant challenges, etc.), suggest otherwise.

In short, identifying the “forces of attraction” of the community sector has become necessary. The clearer that the community organizations’ idea is of what they can offer, the “easier” it will be to identify the most appropriate “sources” for recruitment. It is up to each organization to carry out this reflection depending on their sector and location.

**THE COMMUNITY SECTOR WORKFORCE
A CONTINUING PROCESS OF REFLECTION!**

ANSWERS TO THE QUIZ

ANALYSE YOUR ENVIRONMENT

TRUE OR FALSE

| | T | F |
|---|-------------------------------------|-------------------------------------|
| 1. There is a correlation between aging of the population and the labour shortage. <i>See pages 13 and 22.</i> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 2. Most community workers are between the ages of 25 and 34 years. <i>Answer: 35 to 49 years. See page 23.</i> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 3. In general, in the community action movement, women represent approximately 80% of the workforce. <i>See page 16.</i> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 4. In Quebec, from 1991 to 2001, immigrants accounted for 61% of the growth in the labour force. <i>See page 29.</i> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 5. In 2005, in the community sector, more than one person out of two worked full time. <i>See pages 18 and 19.</i> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 6. In community organizations, employees have less education than in the general population. <i>See page 20.</i> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 7. In community groups, over 80% of the workers earn less than \$20/hour. <i>See page 16.</i> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 8. Today young men in Canada (15-24 years), all proportions maintained, earn approximately 75% of what men in the same age group earned in the mid 1970s. <i>See page 16.</i> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 9. In Quebec in 2005, close to two-thirds of the labour force was over 45 years of age. <i>Answer: 35 years. See page 22.</i> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

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FOOTNOTES



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- ⁶ Activity rates: number of persons in the active population expressed as the percentage of the total population aged 15 years and over. Employment rate: number of persons employed expressed as the percentage of the entire population aged 15 years and over.
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- ⁴⁹ Number of persons employed, expressed as a percentage of the population 15 years and over.
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- ⁵⁴ Statistics Canada – N° 97F0012XCB01001 in the catalogue, 1991 and 2001 census. Data provided by the CAMO for immigrants. Statistics Canada (2001). *Dynamique de la main-d'œuvre canadienne : immigration, demande accrue de compétences et vieillissement* (www.statcan.ca).
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- ⁵⁶ Government of Quebec (2005). *Caractéristiques de l'immigration au Québec – Statistiques*, p. 31.
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- ⁵⁸ Marcel Lauzière, August 30, 2001. *Construire un pont entre les générations au travail*, Canadian Council on Social Development.
- ⁵⁹ Kathryn McMullen and Grant Schellenberg (2003). *Job Quality in Non-profit Organizations*, Canadian Policy Research Networks, p. xiv.
- ⁶⁰ Several of these observations were made by young people interviewed by Frédéric Deschenaux (2003). *Choisir, subir, s'ajuster : la place des milieux communautaires dans l'insertion professionnelle des diplômées et diplômés du postsecondaire*. Doctoral Thesis. Faculté d'éducation : Université de Sherbrooke, 367 pages.
- ⁶¹ Initiative d'expérience communautaire (2003). *Les jeunes travailleurs et travailleuses dans le secteur bénévole et communautaire*, 28 jeunes stagiaires.
- ⁶² Frédéric Deschenaux (2003). *Choisir, subir, s'ajuster : la place des milieux communautaires dans l'insertion professionnelle des diplômées et diplômés du post-secondaire*. Doctoral Thesis. Faculté d'éducation : Université de Sherbrooke, p.4.
- ⁶³ Tania Saba and Gilles Guérin (2004). « Planifier la relève dans un contexte de vieillissement de la main-d'oeuvre », *Gestion*, vol. 29, no 3, fall 2004, p. 60-63.
- ⁶⁴ Statistics Canada (February 2004). « Le point sur les personnes âgées qui travaillent », *The Daily*.
- ⁶⁵ In fact, the average age of retirees in Quebec between 2001 and 2003 was 60. Institut de la statistique du Québec (2005). *Données sociales du Québec – Population active*. Gouvernement du Québec, p. 122.
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- ⁶⁷ CROP survey, on the following website: www.webfin.com/fr/imprimer/ octobre, 2004.
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A large rectangular area with rounded corners, outlined in red, containing horizontal lines for writing. The lines are evenly spaced and extend across the width of the area, providing a template for notes.



THE COMMUNITY ACTION WORKFORCE



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