



# *Checks & Balances*

*Engaging & Retaining Public Service Financial Officers*

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### **List of Abbreviations**

ACFO-ACAF	Association of Canadian Financial Officers
CFO	Chief Financial Officer
DND	Department of National Defence
FI	Financial Officer
FORD	Financial Officer Recruitment and Development Program
HRSDC	Human Resources and Skills Development Canada
NCR	National Capital Region
PWGSC	Public Works and Government Services Canada
SAWS	<i>Spirit at Work Scale</i>

## Executive Summary

The Association of Canadian Financial Officers (ACFO-ACAF), a professional association and certified bargaining agent representing more than 3,800 Financial Officers employed in the federal public service and at NAV Canada, sought to gain a better understanding of the pressing issue of employee engagement from the perspective of its members. In the early stages of this exploration, the ACFO-ACAF became aware of a new approach called *spirit at work*. More than job satisfaction and engagement, spirit at work provides opportunities and direction for both the employer and employee to create positive improvements in the workplace.

A strong relationship has been demonstrated between spirit at work and work-related attitudes such as job satisfaction, engagement, organizational commitment, teamwork and morale—all factors which increase productivity and retention. In addition, as spirit at work increases, turnover and absenteeism decrease. Research has demonstrated that spirit at work can be developed; its creation is a shared responsibility between the employee and the employer.

### ***About the project***

This research project aimed to better understand the issue of spirit at work and employee engagement within the public service from the perspective of ACFO-ACAF members. Its overriding goal was to influence positive action within the public service in order to achieve a more fulfilled, engaged and productive workforce. The project was designed around six initial questions:

- How do members of the ACFO-ACAF experience spirit at work?
- What is the relationship between member spirit at work and work-related outcomes, such as work performance, absenteeism and retention?
- What critical factors impede member spirit at work and retention?
- How do members rate the presence of factors known to contribute to engagement and retention?
- How is spirit at work experienced among the generations?
- How can the public service increase spirit at work and employee retention?

Information was collected from members sequentially in three ways. Six hundred and fourteen members completed an on-line questionnaire and 21 participated in telephone interviews. Six focus groups were held, each of

which was attended by two to four attendees. The data gathered by each method was used to inform the questions for every subsequent method. Findings can be summarized as follows.

### ***How members experience spirit at work***

*Spirit at work for Financial Officers is about making a difference.* It stems from knowing they are part of something meaningful and that their work matters. How Financial Officers make a difference varies. Regardless of the type of work, members are most engaged in and energized by their work when they can see and feel good about the contribution they are making.

*Spirit at work among Financial Officers in the public sector is moderate.* Out of a possible maximum score of 108, the Financial Officers scored, on average, 68. Only 7 per cent of members have high spirit at work. Another 37 per cent have moderately high spirit at work.

*The level of spirit at work varies according to four elements.* Financial Officers in FI-2 and FI-3 positions have less spirit at work than Financial Officers in FI-1 and FI-4 positions. Women have higher levels of spirit at work than men. Members working in Policy Development experience less spirit at work than members working in other positions. Perhaps related to FI levels, members earning less than \$50,000 enjoy more spirit at work than members earning between \$75,000 and \$99,000. No differences in levels of spirit at work were found among regions, departments, education levels or whether members supervised others.

### ***The relationship between spirit at work and work-related outcomes***

*Members with high spirit at work have greater work performance.* In spite of experiencing moderate spirit at work, Financial Officers rate themselves high on work performance. The results indicate that members are working to 82 per cent of their capacity. Members with high spirit at work report working at 90 per cent of their capacity, whereas members with low spirit at work report working at only 74 per cent of their capacity—a 16 per cent difference.

*Members with high spirit at work are more likely to stay.* Overall there is a great deal of movement in the financial community within the public sector, and interdepartmental transfers and promotions have the effect of turnover within specific departments. However, members with high spirit at work are almost half as likely as members with low spirit at work to seek alternative employment.

*Members with high spirit at work miss virtually no work.* On average, Financial Officers report missing one workday over a four-week period. However, members with high spirit at work miss virtually no time at all, whereas members with low spirit at work miss just under two days per month. Although few differences were found between the generations with regard to spirit at work and work outcomes, a difference was noted for absenteeism. Members from Generation X missed more than twice the number of hours per month compared to members in the older boomer generation.

*Members with high spirit at work enjoy very good mental health.* Financial Officers, overall, rate their mental health between good and very good. Members with low spirit at work report good mental health, whereas members with high spirit at work report having very good mental health.

### ***Critical factors that impede member spirit at work and retention***

Individual interviews and focus groups with Financial Officers revealed several factors that hinder spirit at work and the desire to stay.

- Lack of connection between work and the purpose of the organization
- Negative stereotyping of Financial Officers
- Poor relationship skills among managers and poor communication
- Lack of involvement in decision making and projects involving own work
- Inadequate career development and planning
- Lack of appreciation and recognition

Members also identified several concerns specific to the FI community:

- Inconsistent implementation of the Chief Financial Officer (CFO) model
- Non-functioning classification system
- Lack of designations and support to get a designation
- Difficulty in achieving bilingualism, coupled with limited funding and support for language training

### ***How members rate the presence of factors known to contribute to engagement and retention***

#### *Engagement contributors*

The relationship between spirit at work and the presence of factors contributing to engagement is strong. This project assessed four specific areas that support employee engagement: senior management cares, skill development and career advancement, involvement and decision making, and personal responsibility.

*Senior management cares.* The top engagement driver or contributor emerging in Towers Perrin's global research was "Senior management is sincerely interested in employee well-being." Only 25 per cent of the Financial Officers surveyed in this project feel their senior management meets this criterion.

*Skill development and career advancement.* Career advancement is important to members. Although a little over half feel that they have opportunities to improve their skills, less than a quarter of Financial Officers believe that they have excellent career advancement opportunities.

*Involvement and decision making.* Financial Officers are a highly educated and competent group and want to participate. Only 40 per cent agree that they have an appropriate amount of decision making to do their job well, and just over 25 per cent are satisfied with the input they have into decision making.

*Personal responsibility.* Members feel that they set high personal and professional standards. Almost two-thirds of members report seeking opportunities to develop new knowledge and skills.

#### Retention contributors

There is much overlap between those factors contributing to spirit at work and retention. Here is how the Financial Officers rate six factors known to contribute to employee retention.

*Great place to work.* The top global retention driver or contributor according to Towers Perrin is the sense that the organization a person works for has a reputation as a great place to work. Only 31 per cent of Financial Officers agree that where they work is a great place.

*Work-life balance* is an important concern for members and a factor that played prominently in their decision to work for and stay with the public sector. Over two-thirds of members say they are able to balance their work and personal life.

*Relationship with supervisor.* Three-quarters of members agree that they have a good relationship with their supervisor, in contrast to one-quarter of members who feel that senior management cares.

*How employees are treated.* Employees want to know that they matter, that they are valued, respected and have a voice. They want to know that the organization has their best interest in mind when making decisions. Less than one in five members are satisfied with the organization's people decisions.

*Career track and advancement.* Financial Officers are a competitive group and are interested in progressing. Whereas just over half of Financial Officers understand their career track within the public service, less than one-quarter agree that they receive training to keep them competitive.

*Support for New ideas.* Financial Officers pride themselves in strategic thinking: solving problems and improving systems. Yet just over a third of members agree that they work in an environment where new ideas are encouraged.

### ***How spirit at work is experienced among the generations***

Surprisingly, how Financial Officers from different generations experienced spirit at work was the same. Perhaps because of the nature of their work, how they approach their day-to-day work is also similar. Yet some differences are apparent.

Younger generations seem to be redefining the workplace, which is causing a divide among some members. Younger members' increased educational qualifications, comfort with technology, competitive nature, commitment to career advancement, and expectation for work-life balance are changing the face of work for Financial Officers in the public sector.

### ***Discussion***

Financial Officers in the public sector are a highly educated and professional group who are committed to their work. Thus, they could be expected to have a higher overall spirit at work score than “moderate.”

Members identified the presence of many factors important to them—including challenging work assignments, opportunities for rotations, benefits, security and work-life balance. All of these contribute to job satisfaction, but they are not enough to have high spirit at work. Despite these many advantages, less than a third of members agree that that this organization has a reputation as a great place to work.

Often referred to by members as the “golden handcuffs” or “the catch for life,” working for the federal government is so secure, most employees will put up with anything to keep it. Yet they are looking for more. That “more” is an opportunity to make the world a better place. To do meaningful work and to make a difference in the lives of Canadians. To have spirit at work. Missing factors identified by members include the following:

***The most pressing concern with regard to factors that contribute to spirit at work is a perceived lack of caring by senior management***

Members want to know that they are valued, respected and included, that senior management is interested in them and that they belong. With a pattern of basing promotion decisions on test results and a history of promoting the technically strong employee, more and more managers among in the FI group are lacking the people skills essential for effective leadership and the creation of a sense of community so important to spirit at work. The top organizational condition that fosters spirit at work is inspired leadership. It is difficult to be inspired when you feel that senior management does not care.

***Members want to know that their work matters, that what they are doing counts***

It is not enough to get the assignment done; members want to know who is benefiting and how. They want to see the connection between their work and the mandate of the organization. This is a key element of spirit at work and retention that is missing for most Financial Officers.

***Career advancement is important to Financial Officers***

While members take responsibility for personal and professional development, they are interested in more opportunities for skill development and leadership training. Creation of career goals and plans along with support to achieve them will result in employees' being more willing to stay longer in a position, a more planned exit of employees, and more fully developed and prepared employees for promotion to the next level.

***The generational unease is not going away***

Acknowledging similarities and learning about and embracing differences will go a long way to bridge the gap experienced by all generations. Much is to be learned from and by all the generations. Not encouraging such learning is a missed opportunity for all members.

***Recommendations: How the public service can increase spirit at work and employee retention***

Recommendations to increase spirit at work and retention of Financial Officers in the public sector fall into four areas: employee opportunities, organizational conditions, generational concerns, and matters unique to the FI community. These recommendations are provided in greater detail in the report proper.

**1. Provide opportunities for Financial Officers to cultivate their own spirit at work.**

- Emphasize the deeper purpose of their work
- Connect their work to the mandate of the department
- Show how their work benefits Canadians
- Cultivate a philosophy of service to Canadians
- Promote a sense of community among members

**2. Create the organizational conditions that foster spirit at work.**

- Enhance the leadership in the public sector
- Cultivate relationships across all levels.
- Improve communication and involvement of Financial Officers
- Support Financial Officers to create and implement a sound career plan

**3. Understand, appreciate and manage the similarities and differences across the generations.**

- Build on the similarities and appreciate the differences
- Promote mentoring across the generations
- Prepare the younger generations for leadership roles

**4. Respond to concerns unique to the Financial Officer community.**

- Develop and implement a consistent CFO model plan across departments
- Create a new classification system that is congruent with the CFO model and allows for reasonable advancement
- Increase spirit at work for members working in policy development
- Modify recruitment strategies and practices to address concerns

## **Conclusion**

The ACFO-ACAF intends to influence positive action within the public service in order to enhance employee engagement and spirit at work among Financial Officers. The aim of this research project was to better understand employee engagement among members and to identify strategies to enhance employee engagement. Four key areas are identified to achieve the ACFO-ACAFs' goals.

As the ACFO-ACAF advocates to improve engagement, working conditions and appreciation of Financial Officers, the approach called *spirit at work* offers concrete, proven, research-based methods to increase employee wellbeing, job satisfaction, and commitment. Spirit at work is not a panacea, but it will help employees become engaged and inspired by their work. And it corresponds with a profound sense of well-being, increased work performance and improved employee retention.

Work gives an opportunity to find meaning and fulfillment that employees are so desperately seeking. It provides a way to serve and to make a contribution, to make a difference in the lives of others. It gives a chance to create a sense of community and to belong.

Spirit at work is accessible to everyone. With the implementation of these recommendations, spirit at work can be developed and fostered at both the individual and organizational level for Financial Officers.

## Introduction

### ***About the association***

The Association of Canadian Financial Officers (ACFO-ACAF) is a professional association and certified bargaining agent representing more than 3,800 Financial Officers employed in the federal public service and at NAV Canada, which operates Canada's civil air navigation service. The ACFO-ACAF works to improve the working conditions for Financial Officers, share information about the profession and raise awareness about the important role played by its members.

ACFO-ACAF members are financial professionals working in 65 departments and agencies across Canada and around the world. Many hold business degrees or professional accounting designations. One of the current issues facing the ACFO-ACAF is how to ensure that its members are fulfilled at work—fully engaged in their jobs.

### ***The issue of employee engagement***

The Conference Board of Canada shares these concerns with the ACFO-ACAF. In 2008, the board identified engagement and retention as the top two concerns facing human resource managers. Research has documented that only 23 per cent of Canadians are fully engaged in their work. These employees are giving their full effort on the job, going above and beyond what is required because they are committed to creating a better product or service.

Much of the research and discussion around employee engagement within the federal civil service has involved senior staff. The majority of employees have yet to be included in these conversations.

The ACFO-ACAF wanted to gain a better understanding of employee engagement from the perspective of its members. In the early stages of this exploration, the association discovered a new approach called *spirit at work*. More than job satisfaction and engagement, spirit at work provides opportunities for both the employer and employee to create positive improvements in the workplace.

### ***About spirit at work***

Spirit at work is about being fully engaged and energized by one's work. It is also about finding meaning and purpose, beyond self, through work and seeing work as a service to others. Employees with spirit at work have profound feelings of well-being and a belief that their work makes a positive contribution to society. They share a common purpose and connection with others as well as an awareness of a connection to something larger than self.

A strong relationship has been demonstrated between spirit at work and job satisfaction, engagement, organizational commitment, teamwork and morale—all factors that increase productivity and retention. Moreover, as spirit at work increases, turnover and absenteeism decrease.

Spirit at work is accessible to everyone and can be developed. The creation of spirit at work is a shared responsibility between the employee and the employer.

## The Research Project

### ***Purpose of the project***

This research project aimed to better understand spirit at work and employee engagement within the public service from the perspective of ACFO-ACAF members. Its overriding goal was to influence positive action within the public service in order to achieve a more engaged and productive workforce.

This research project was designed around six initial questions:

- How do members of the ACFO-ACAF experience spirit at work?
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- What critical factors impede member spirit at work and retention?
- How do members rate the presence of factors known to contribute to engagement and retention?
- How is spirit at work experienced among the generations?
- How can the public service increase spirit at work and employee retention?

### ***Research process***

Information was collected from members sequentially in three ways: questionnaires, telephone interviews and focus groups. The data gathered by each method was used to inform the questions for every subsequent method.

1. All members of the ACFO-ACAF were invited to complete an on-line survey comprised of 99 questions focusing on spirit at work, intention to quit, contributors to engagement and retention, and health and work performance. The survey was administered in French and English by an outside polling company. Six hundred and fourteen members completed the survey. Out of 65 departments and agencies, 56 were represented in this sample.
2. As part of the survey, members were asked if they would be willing to participate in a one-on-one telephone interview with the consultant. Over 60 members put their name forward. The intent of the interviews was to gain clarity and a deeper understanding of the survey responses.

3. For example, the interviews explored reasons for moderate spirit at work among Financial Officers, differences in spirit at work among position and classification, and similarities and differences among generations. An initial 15 interviews were completed and analyzed. Based on the themes that emerged, particularly around the differences among departments, a further six interviews were completed for a total of 21 one-hour interviews.
4. A combination of the survey and interview results pointed to certain areas requiring further exploration. Six focus groups were held in Ottawa, each of which was attended by two to four attendees. Attendance was reduced as a result of the focus groups being held during fiscal year end. In spite of the low attendance, the content obtained from the focus groups was very rich. These groups explored particular FI levels, the impact of classification, the CFO model, and designation and language requirements and their effect on spirit at work.

Analysis of the data sets from the three research methods provided a compelling response to the project's objectives. What follows is a description of the members who participated in each of these three phases.

### ***Project participants***

#### *Description of survey participants*

Six hundred and fourteen Financial Officers from 56 departments and agencies across 11 provinces and territories, from Victoria to Whitehorse to St. John's, completed the questionnaire. Sixty-seven per cent of the responses were from the National Capital Region (NCR), compared to 72% of members based there. The six largest departments—Public Works and Government Services Canada, Human Resources and Skills Development Canada, Department of National Defence, Health Canada, Correctional Service Canada, and Agriculture and Agri-Food Canada—comprised 47% of the response.

Fifty-seven per cent of the respondents were female, almost an exact correspondence to the 57.4% of members who are female. All generations were represented: Generation Y (12%), Generation X (46%), Young Boomers (30%) and Older Boomers (12%). This generational breakdown was based on that used by the Conference Board of Canada, i.e., Generation Y, born 1981–1999 (ages 18

to 29 in 2009, when the data was collected); Generation X, born 1965–1980 (ages 30 to 44), Young Boomers, born 1955–1964 (ages 45 to 54); and Older Boomers, born 1945–1954 (ages 55 to 64).

The vast majority of participants were Caucasian (85%), whereas 9% were Asian, 3% were Aboriginal and 3% were African. Their highest level of education was graduate or professional degrees (47%), undergraduate degrees (37%), post-secondary diplomas (13%), and technical training or less (4%). Note that throughout the report, some percentage breakdowns add up to less or more than 100% due to rounding.

Occupations represented included Financial Generalist / Operations (44%), Comptroller (20%), Financial Systems Development and Operations (18%), Cost Accounting (9%), Policy Development (6%) and Internal Audit (4%). Fifty-two per cent supervised staff. Regarding Financial Officer level, 30% were FI-1s, 34% were FI-2s, 29% were FI-3s and 7% were FI-4s. Five per cent of the participants earned less than \$49,999; 38% reported earnings between \$50,000 and \$74,999; 50% reported earnings between \$75,000 and \$99,999; and 7% reported earnings of \$100,000 or more.

#### *Description of interview participants*

From the self-identified group, a cross-section of participants was selected for telephone interviews. Fifty-two per cent of the participants were male and 57% supervised others. Ages ranged from 26 to 61. The vast majority were Caucasian (73%), 19% were Aboriginal, and 8% were Other. The highest level of education was graduate or professional degrees (62%), undergraduate degrees (38%). Members were from a variety of departments, including Human Resources and Skills Development Canada, Health Canada, Correctional Service Canada, Indian and Northern Affairs Canada, Public Works and Government Services Canada, Department of National Defence, Statistics Canada, Fisheries and Oceans Canada, and the RCMP Public Complaints Commission.

Regarding Financial Officer level, 14% were FI-1s, 43% were FI-2s, 29% were FI-3s and 14% were FI-4s. Occupations represented were Financial Generalist / Operations (24%), Comptroller (24%), Financial Management / Operations (24%), Financial Systems Development and Operations (9%), Policy Development (5%), Internal Audit (5%), FORD analyst (5%) and TB Submissions (5%). Five per cent of the participants earned less than \$49,999; 29% reported earnings between \$50,000 and \$74,999; 47% reported earnings between \$75,000 and \$99,999; and 19% reported earnings of \$100,000 or more.

*Description of focus group participants*

Detailed descriptions are not available for the focus groups. All members were from the NCR; however, a few members had worked previously in the regions. The majority of attendees were English and 70% were female. Ages ranged from late 20s to mid-50s. Members self-selected based on their interest and selection criteria. For example, only members with FI-2 classification participated in the focus group about spirit at work at the FI-2 levels. Only members working in policy attended that discussion. Focus groups regarding designations included a cross-section of members with degree only, classification only, and degree and classification. The focus group for language requirements was attended by a fully bilingual person (EEE), a French member working on her English competency (ECC) and an English member working on her French competency (CBB).

## Project Findings

### ***How members experience spirit at work***

Spirit at work for Financial Officers stems from knowing they are a part of something meaningful, they are making a difference and that their work matters.

*It's when I am sure inside that I'm making a difference. Each time I walk on the street and see a homeless person, I know I'm doing something directly for him. (FI-3, Young Boomer, HRSDC)*

How Financial Officers make a difference varies. Some see the impact of their work directly on the client, making a positive connection between their work and the departmental mandate. Others feel best when they are creating resources or financial statements that contribute to the decision making of others. Yet, for others, their spirit at work is highest when they are interacting with and advising clients, problem solving, and participating in decision making. Finally, knowing that they and their work are valued by the organization contributes to spirit at work and employee engagement. Regardless of the type of work, members are most engaged and energized by their work when they can see and feel good about the contribution they are making.

Here is a sample of how members describe their experience of spirit at work.

*I understand what the result of my work is on the mandate of the organization and I can see the impact of my work on how the organization operates. (FI-4, Gen X, DND)*

*I'm advising and helping people and inputting on decision making. It's energizing to know what you're doing is making a difference. (FI-4, Young Boomer, HRSDC)*

*I am able to contribute to the country as a whole. (FI-1, Gen Y, DND)*

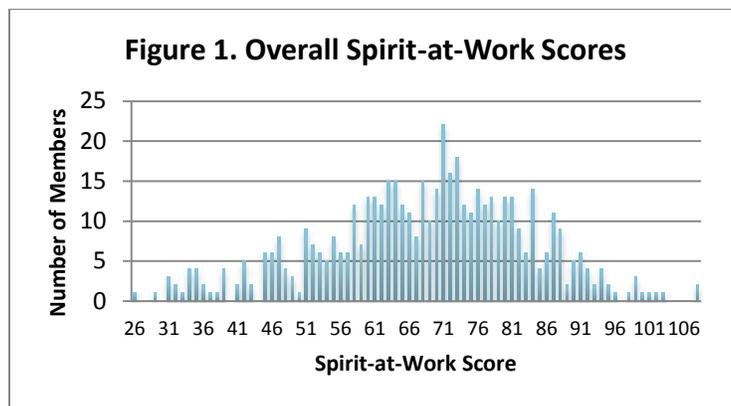
### ***Measuring spirit at work***

How much spirit at work a person has is measured with the *Spirit at Work Scale* (SAWS). This scale which is made up of 18 items was included in the survey which was administered on-line. The *Spirit at Work Scale* measures the extent to which persons experience the four dimensions of spirit at work: engaging work, sense of community, mystical experience, and connection to something

greater than self. The total of these four dimensions make up the overall spirit-at-work score.

**Spirit-at-work scores for ACFO-ACAF members**

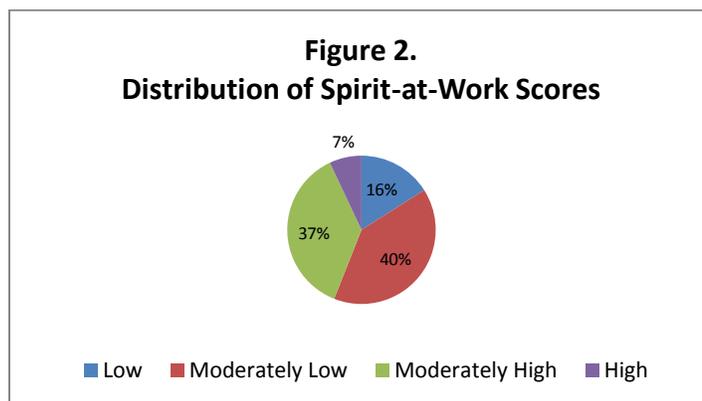
Individual spirit-at-work scores among the Financial Officers range from a low of 26 to a high of 108, the highest possible score. The graph below identifies the distribution of individual scores among all members surveyed.



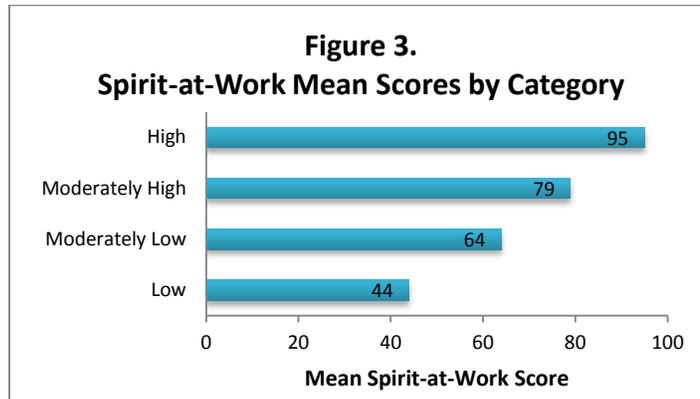
Out of a possible maximum score of 108, the Financial Officers scored, on average, 68, a score considered moderate and which leaves much room for enhancement.

The scores were grouped into four categories: high, moderately high, moderately low and low. Only 7 per cent of members enjoy high spirit at work. Another 37 per cent have moderately high spirit at work. More than half experience moderately low or low spirit at work.

The following pie chart shows the presence of spirit at work by category for all members.



The difference between members with high spirit at work and members with low spirit at work is more than 50 points. See the average spirit-at-work scores for each category, illustrated in the next graph.



***The four dimensions of spirit at work***

As mentioned in the discussion of the *Spirit at Work Scale*, spirit at work is comprised of four dimensions: engaging work, sense of community, mystical experience, and a connection to something larger than self. Please refer to the Appendix for a breakdown of member responses. Here the four dimensions are explained and the results summarized for Financial Officers.

**Engaging work** refers to how we feel about our work, our ability to find meaning through work, and the extent we feel we are engaged in work that has a deeper purpose. It also includes the degree to which we feel grateful for our work, and the extent to which we see a match among the requirements of our work and our personal values, beliefs and behaviours.

Two-thirds of the FI community experiences a match between the requirements of their work and their values, beliefs and behaviours. But less than half of the members are passionate about their work and find meaning in their work. Just a third are satisfied with where they are at work. Does this have to do with the fact that few FIs see their work as a vocation or calling?

**Sense of community** considers the extent to which we feel like we belong and whether we share a sense of purpose and meaning with co-workers about work. It also includes a level of trust and personal connection with co-workers.

Half of the FI community share a sense of trust and personal connection with their colleagues, but less than a third feel like they are part of a community at work. Just over one-quarter share a strong sense of meaning and purpose with their co-workers about work.

***Connection to something larger than self*** refers to the influence of our deeply held values on our work experience and to the extent that our beliefs influence everyday decisions at work. It also involves being connected with a greater source that has a positive effect on work.

Personal beliefs play an important role in everyday decisions made at work for just over half of the FI community. Just under one-half report that their work is inspired or guided by their deeply held values. And just under one-quarter say that they experience a connection with a greater source that has a positive effect on their work.

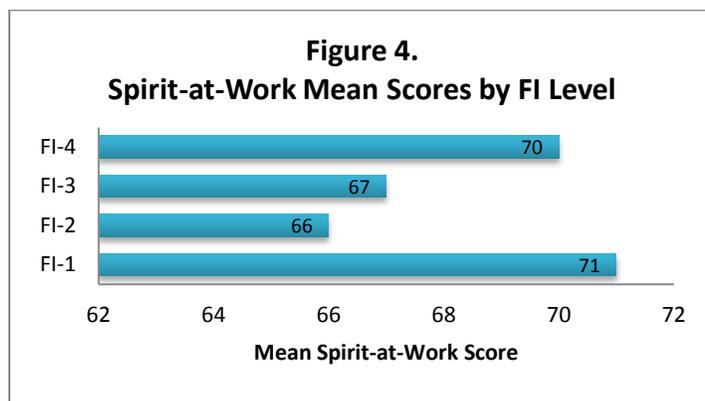
***Mystical experience*** refers to those moments when we have a peak experience at work. It captures those times when we experience complete joy at work or the feeling of energy or vitality that is often difficult to describe. We are so involved in our work that we lose our sense of time. These are the moments that remind us why we chose our work in the first place and keep us connected to our work.

Just over a quarter of the FIs said that they experienced a “high” at their work. A quarter was so involved in their work that they lost their sense of time. Seventeen per cent say that there are moments when they experience complete joy at work or an energy or vitality at work that is difficult to describe.

#### ***Elements that account for score variations among members***

The level of spirit at work varies according to four elements: Financial Officer level, gender, position and salary.

**Financial Officer (FI) Level.** Differences in spirit-at-work scores were found among the Financial Officer levels. Discussions with members in the interviews and focus groups affirmed that both FI-2s and FI-3s experienced less spirit at work than FI-1s and FI-4s, as illustrated in the following figure.



Members were not surprised that FI-1s had higher spirit at work than FI-2s and FI-3s. Most of the FI-1s are recruited directly from universities, with promises of financial assistance and support to obtain designations and language requirements. Many are part of the Financial Officer Recruitment and Development Program (FORD), where they are mentored, receive extra training, and are exposed to different rotations. Upon completion of the FORD Program, most employees are reclassified. Here is how a member who is an FI-1 experiences work as a financial officer:

*When you first get hired, you're just starting out. Everything's new and you're really engaged in learning. You're very excited to get into a higher level position. (FI-1, Gen Y, DND)*

The FI-2s and FI-3s are more like the forgotten middle child. They work hard, accomplish a lot, yet they lack the authority that goes with the responsibility of their work.

*The FI-2s and FI-3s are workhorses, and they do a lot of work. They have a lot of pressure to perform. (FI-4, Gen X, HRSDC)*

Members at the FI-2 and FI-3 levels say that they often do not receive the full information to do their work adequately. They report being caught between the people they supervise and their boss. They support and mentor the FI-1s but do not receive similar attention or support from their supervisors.

*The requirement to have a designation that came in with the CFO model is the reason for low spirit at work. I can act as an FI-4 but they won't give me the job. (FI-3, Young Boomer, Focus Group Participant)*

Members stated that requests for language training and financial support for designations are often denied, but they cannot get ahead without them. With limited FI-4 competitions, FI-3s experience gridlock. They become stuck, with limited options for promotion. Hence the negative impact on their spirit at work.

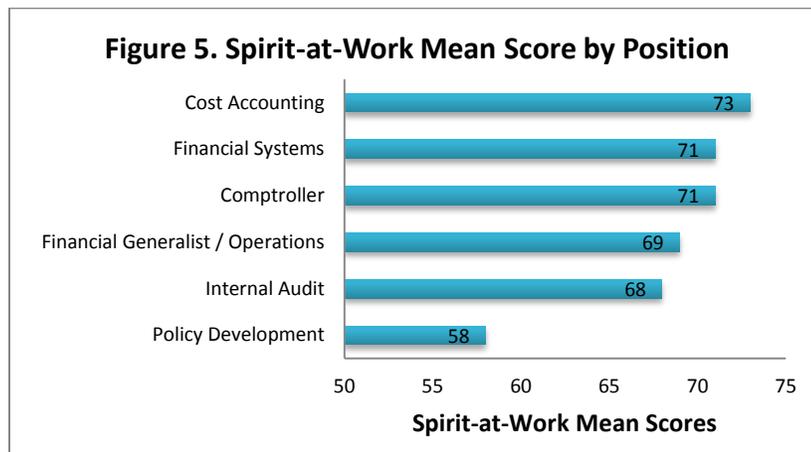
*Where I am, the FI-4 level has a lot of influence. This is where you're definitely a technical specialist in your area, you start to make decisions, and the director depends on you for your opinion. (FI-3, Gen Y, Stats Canada)*

Financial Officers report a difference again when they reach the FI-4 level. Although the spirit at work level of FI-4s overall is still not high, it is higher than their colleagues in FI-2 and FI-3 positions. They say that at the FI-4 level they experience more involvement, increased decision making and increased influence—all factors that contribute to spirit at work.

*Most FI-1s are coming in as part of a recruitment program which has a very set training pattern. In most departments, they are handled as a group and receive additional training together so share a bond with each other. At the end of the continuum, many FI-4s are going to be involved at a higher level in management decisions, so I expect their spirit at work to be higher. The FI-2s and FI-3s probably get lost in their organizations; those are the guys doing the grunt work and don't understand why they're doing it. (FI-4, Gen X, DND)*

**Gender.** Female FIs experience more spirit at work than male FIs. Whereas the overall average spirit-at-work score is 68, females scored 72 and males scored 66.

**Position.** Members working in Policy Development experience less spirit at work than members working in other positions. Whereas FIs in Policy Development averaged a spirit-at-work score of 58, FIs in other positions had average scores ranging from 68 to 73, as illustrated in this figure.



Most Financial Officers were not surprised to hear about the low spirit-at-work score for members working in policy. Members who have rotated through policy said that they did not like it. The pace was too slow and although accounting knowledge was used, there was not a lot of work with numbers. Moreover, most people see writing policy as tedious and boring and say that the position lacks a career path.

*If you like numbers, this is not a good fit, because there are not a lot of numbers here. Having said that, I use my accounting knowledge in policy development. (FI-4, Policy Development, Focus Group Participant)*

*Policy has no career path; it doesn't lead you anywhere. (FI-4, HRSDC, Treasury Board Submissions)*

Policy development does not get a lot of respect and is often viewed as a roadblock—so much so that some policy departments have been named “obstructionist.” Yet members recognize that policy plays an important role in providing interpretation and guidance.

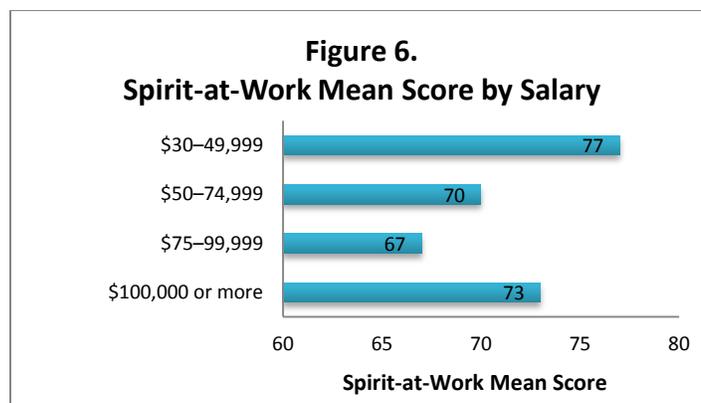
*I guess the reality is that no one likes to be told what to do. For me, policy gets in the way of doing business. (FI-4, HRSDC, Treasury Board Submissions)*

Having the right “fit” is thought to be more important in policy than any other position. Members say that successful employees tend to be more introverted, reflective and analytical. And they have to like writing and rewriting. Adding other responsibilities is one way to add to the variety.

*Policy is not for everyone. I am an anomaly. I like policy. (FI-4, Policy Development, Treasury Board)*

*Providing people in policy an opportunity to train others would give more variety to our work. (FI-3, Policy Development, Corrections)*

**Salary.** Differences in spirit-at-work scores were detected related to salary. Members earning between \$30,000 and \$49,000 reported more spirit at work than members earning between \$75,000 and \$99,000. This difference might be less a statement about salary and more about the difference in spirit at work among the different FI levels.



No differences in levels of spirit at work were found among regions, departments, those in supervisory roles or by education levels.

**Regions.** There were no differences in the level of spirit at work experienced across regions. Nor were any differences found between the NCR and the rest of Canada.

**Departments.** Because of the number of responses required to complete statistical analyses, only the six largest departments were able to be compared. Although no quantitative differences were found among departments, some perceived differences were expressed by members during the interviews.

**Supervision.** Whether or not members had a supervisory role had no bearing on their experience of spirit at work. No differences were found.

**Education.** The FI community tends to be a highly educated group. No differences in the level of spirit at work were related to education levels.

### ***Summary of Findings***

The level of spirit at work varies according to four elements: Financial Officer level, position, gender and salary. Financial Officers in FI-1 and FI-4 positions enjoy more spirit at work than Financial Officers in FI-2 and FI-3 positions. Women have higher levels of spirit at work than men. Members working in Policy Development experience less spirit at work than members working in other positions. Perhaps related to FI levels, members earning less than \$50,000 enjoy more spirit at work than members earning between \$75,000 and \$99,000. No differences in levels of spirit at work were found among regions, departments, those in supervisory roles or by education levels.

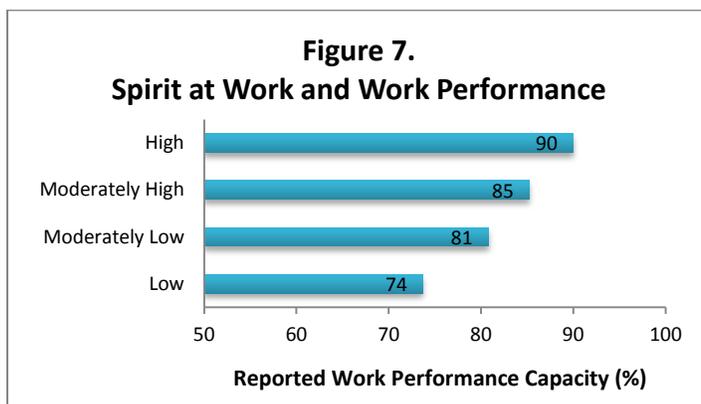
### ***The relationship between member spirit at work and work-related outcomes***

Previous research has demonstrated correlations between spirit at work and outcomes such as job satisfaction, organizational commitment, organizational culture and retention. In this study, we explored and found positive relationships between spirit at work and work performance, retention, absenteeism, and employee mental health.

#### ***Members with high spirit at work have greater work performance***

We all know about the impact of absenteeism on the workplace and productivity. But “presenteeism”—where employees are on the job but not fully functioning—can cut productivity by one-third or more. Some researchers believe that the cost of presenteeism could be around seven to nine times more than that of absenteeism. Do Financial Officers suffer from presenteeism?

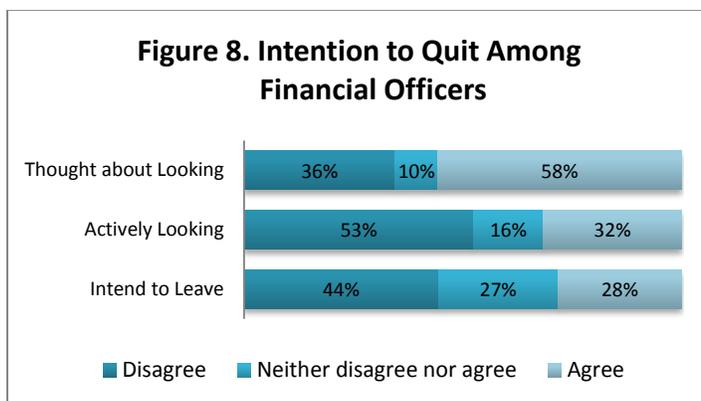
Overall, Financial Officers rate themselves high on work performance. The results indicate that overall, they are working to 82 per cent of their capacity. Members with high spirit at work report working at 90 per cent of their capacity, whereas members with low spirit at work report working at 74 per cent of their capacity—a 16 per cent difference. While performance is not a concern for most members, those members with low spirit at work might indeed be suffering from presenteeism.



Financial Officers are a mobile group

Although many Canadians feel their ability to leave their organization has been limited by the recession, Financial Officers working in the public sector believe that the threat of job loss is very low.

In the past few months, over half of the FI community has seriously thought about looking for new work. Just under a third is actively looking for another job and twenty-eight per cent of FIs plan to leave the organization in the near future.



Although they may be interested in a new job, not all members plan to leave the public service. Some indicated an interest in working for a different department, others expressed a desire to move to an alternative position, and yet others are thinking about moving to a program area or different union.

*I'm aware that I would be frankly stupid to leave government because there are so many options available for me here. I think people may be talking about leaving the financial world to go maybe work in the program because they don't like how their department is managed. That's something I've entertained. (FI-2, Gen X, Comptroller)*

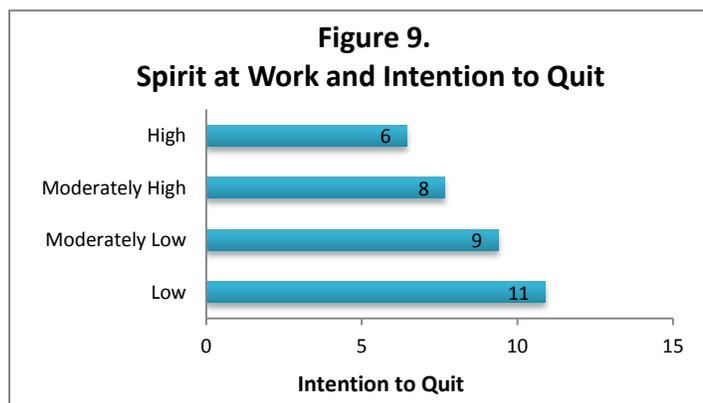
There is a great deal of movement in the financial community within the public sector. The slogan *One employer, thousands of opportunities* works well as a recruitment strategy, but, ironically, often plays havoc with day-to-day management. While internal and interdepartmental transfers and promotions may not count as turnover to the government as a whole, they definitely have the effect of turnover for that particular department and the clients it is serving. The knowledge, the experience, the continuity is gone, adding to the loss created by the exit of the boomers. Here are two comments from members that speak to this concern.

*My complaint is that every time I call NCR, I speak to a new person, who often knows less than I do. It is so frustrating. (FI-2, Gen X, Region)*

*They are moving from position to position every six months. They aren't engaged when they are always looking to move. (FI-3, Young Boomer, Focus Group Participant)*

Members with high spirit at work are more likely to stay

As spirit at work increases, the intention to quit decreases. Results indicate that Financial Officers with low spirit at work intend to leave, whereas Financial Officers with high spirit at work intend to stay. See the figure below depicting the differences. A lower score indicates less intention to quit.



*The government does a good job of attracting Financial Officers; it's the retention that's becoming an issue. They do a good job in that they're going out to universities and hiring bright individuals. They give the message that they want us to get our designations and are willing to pay for it and support us to achieve it. Those were all sales pitches that attracted me to the government. But it stops there. For retention, there has to be that excitement coming to work. (FI-3, Gen X, Region)*

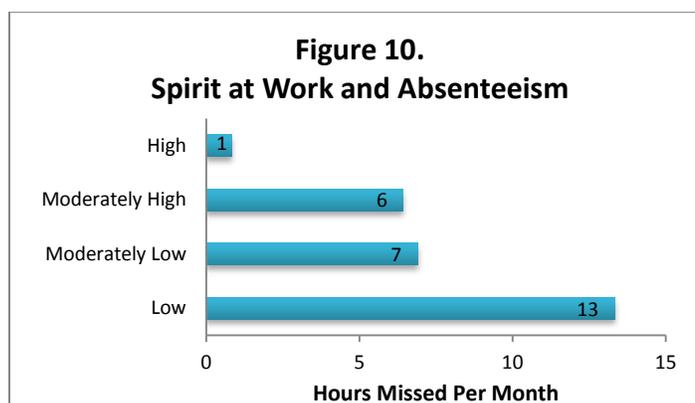
Many challenges come with working for a large bureaucracy. Members advise that work in large departments tends to become specialized and sometimes monotonous. The excitement is lost. Decision making processes and lengthy approval procedures curb innovation. Employees sometimes feel held back. Here are some reasons members chose to leave the ACFO-ACAF or to change unions.

*I really liked working for the government. I liked the job and I liked the conditions. But because it's so big an organization, you don't do as much challenging work as when you're working for the private sector. So I wanted to move on. I took a leave of absence and I am now working in the private sector. (FI-2, Gen X, Corrections)*

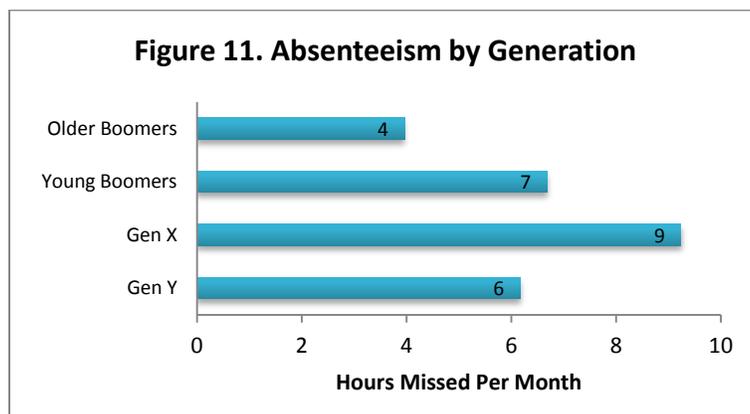
*I was acting as an FI-3. I've shown the competencies for the position but was screened out because I didn't have enough years experience. Because of that I jumped unions. (FI-2, Gen Y, Stats Canada)*

Members with high spirit at work miss virtually no work

On average, Financial Officers report missing one workday over a four-week period. However, members with high spirit at work miss virtually no time at all, whereas members with low spirit at work miss just under two days per month.



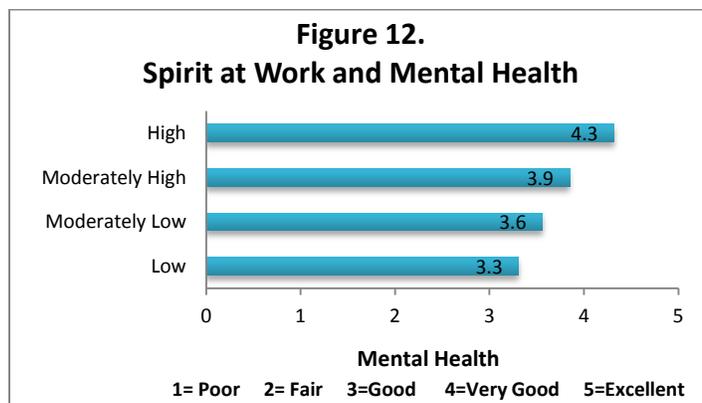
Whereas few differences were found between the generations with regard to spirit at work and work outcomes, a difference was noted for absenteeism. Members from Generation X missed more than twice the number of hours per month compared to members in the Older Boomer generation (see figure below). Perhaps Generation X members have more family demands than their colleagues.



Members with high spirit at work enjoy very good mental health

A positive relationship exists between spirit at work and mental health, and this was again shown with Financial Officers. In other research, Kaizen Solutions has found that as spirit at work increased, depression decreased.

Financial Officers, overall, rate their mental health as good. Members with low spirit at work report good mental health, whereas members with high spirit at work report having very good mental health.



**Summary of findings**

The level of spirit at work Financial Officers experience impacts how they feel about their work and how they perform. Those with higher spirit at work have a greater work performance capacity than those members with lower spirit at work. Members with high spirit at work are half as likely to leave their job as their colleagues with low spirit at work. They are also less likely to call in sick. In fact, Financial Officers with high spirit at work miss virtually no work. Finally, while members enjoy good mental health, those with high spirit at work report very good mental health.

Unfortunately, only 7 per cent of members enjoy high spirit at work. Another 37 per cent have moderately high spirit at work. More than half of members have moderately low or low spirit at work. Given that Financial Officers like their work and feel that there is a good fit between what they do and their personal values and beliefs, what is preventing the vast majority of them from enjoying higher spirit at work?

### ***Critical factors that impede spirit at work and retention***

Individual interviews and focus groups with members revealed several factors that impede spirit at work among Financial Officers. These include a lack of connection between work and the purpose of the organization, negative stereotyping of Financial Officers, poor relationship skills among managers and poor communication, lack of involvement in decision making and projects, and inadequate career development and planning. Here these factors are couched in their own terms.

**Knowing how my work makes a difference.** Members want to take pride in their work and feel good about their contribution. They want to know that their work matters. Given the size of the federal public service and most departments and the nature of the work, it is easy for Financial Officers to lose sight of the deeper purpose of their work. An understanding of the relationship between members' roles, the strategic outcomes of their departments, and how they are impacting the lives of Canadians through their work goes a long way to helping members become more engaged. For many, this understanding is missing.

*Sometimes our work is so far away from the Canadian public that we lose track of its purpose, so it is easy to become demoralized. (FI-2, Gen X, HRSDC)*

*It is hard to be interested in your work or do more than the minimum requirements when you don't have a sense of what it's all leading to. (FI-2, Gen X, HRSDC)*

**We are not just calculators.** Who is in the Financial Officer community? Are they just paper pushers or are they strategic business advisors? That is one of the key issues haunting the community, because for years they were seen as number crunchers, not as advisors. One member calls for an image makeover.

*We're really a misunderstood group because we don't seem to fit anywhere and people don't understand what we do. Frankly, we need an image makeover so the people know we're there to help them and not to impede them. (FI-2, Gen X, Comptroller)*

**In the end, it is the relationships that count.** Relationships matter. That sense of community—where we feel like we belong and share a connection and common purpose with our colleagues—matters. Evidence of trust and respect in the workplace builds strong relationships. Having your supervisor, manager and leader know you and be concerned about your well-being, contributes to employee spirit at work.

*It really is whom you're working with, who your manager is, and how well you get along with your co-workers that matters. If you're in finance, I don't think it really matters what department you're in, the work is going to be similar. (FI-3, Gen X, Financial Management)*

*I love my work, but I am not happy. I do not feel part of the group and I want to feel like I belong. (FI-2, Young Boomer, Health Canada)*

**We still don't really know how to communicate.** Communication is the key to employee engagement and spirit at work. Members want information shared with them. What is the purpose of this assignment? How will the information be used? What was the result? And they want to be given a voice—to be heard. They are capable, professional people and they want to contribute.

*There's not enough listening. There's a fundamental lack of understanding and recognition from senior management that they have a lot of capable and intelligent people. . . . You have competent staff, you have experienced people, you have people with degrees and designations—they don't come out of a pop-tart box. (FI-4, Young Boomer, HRSDC)*

**I'm not involved enough.** Whether it is with senior management, their immediate supervisor or their client, Financial Officers want to be more involved. They are confused as to why the employer requires degrees and designations but does not always benefit from them. They are financial advisors and would like to share their expertise. They want to have more input or more say. They want to contribute.

*Recognize people's capabilities and involve them. Make good use of their skills and abilities. Involve me. Talk to me about the project. Take me to meetings. Ask me for my input. (FI-4, Gen X, DND)*

**Career planning and development is not a priority for the employer.** Career development and progression is important to Financial Officers and many feel that career planning and development falls to the employee. Frustration occurs when members don't see opportunities to improve their skills or to advance in their career.

*Development of staff, particularly the junior to intermediate staff, is essential to the creation of an engaged workforce. The younger staff, they are of a different culture. They have different needs and that requires different management and development of the staff. We need to look at providing training opportunities, perhaps projects or rotations, where they can continue to develop. (FI-4, Young Boomer, HRSDC)*

**Recognition: It is not only about the money.** We all like to know that we are doing a good job and that we are appreciated. Financial Officers want to be appreciated by their supervisors. They are looking for their managers to stop by, say thanks, and express gratitude in staff meetings. They feel that their talents, skills and abilities are not adequately recognized.

*I mean it's not all money, obviously. People need the sense of appreciation from the higher levels—not just lip service, but a genuine appreciation. They want to know that they're making a difference and that they're not just showing up for their seven-and-a-half-hour shift. Assuming pay equity is taken care of; I think they want to know that they're doing a valuable job for the Canadian public and that they have a sense of appreciation from senior management. (FI-2, Young Boomer, Corrections)*

*Sometimes all it takes is a slap on the back and having my boss say, "Well done." (FI-3, Young Boomer, HRSDC)*

In addition to factors that commonly impede spirit at work, members identified several **concerns unique to the FI community**, including implementation of the CFO model, the current classification system, the push towards designations, and language requirements.

**Implementation of the CFO model.** The Federal Accountability Act was introduced in 2006 to create a culture of accountability by increasing transparency of government spending and establishing clear links between approved expenditures and their outcomes. This has resulted in increased demands on federal finance personnel. To meet the demand, the role of the departmental comptroller—the senior Financial Officer in a department—has been reshaped into what is called the Chief Financial Officer (CFO) model. While

Financial Officers support the notion of accountability and transparency, the implementation of the CFO model has taken its toll. Members report a lack of consistency among departments and lack of clarity among lower FI levels.

*The CFO model isn't the problem; implementation of the model is. There is a lack of clarity at the lower levels and more than that, it is left to each department to implement. (FI-3, Young Boomer, Focus Group Participant)*

**Classification system.** Members strongly agreed that the classification system is out-dated and no longer works. Discrepancies exist, particularly between the regions and the NCR. Financial Officers in the regions indicate that they often carry more responsibilities (such as budget and supervision) than a colleague in the NCR but have a lower classification.

The speed and ease with which a member can move from level to level is inconsistent. Obtaining an FI-2 in the NCR is almost a given after two years' service or upon completion of the FORD Program. Moving up to an FI-3 is a big jump and many experience gridlock at this level. Not only are there fewer FI-4 positions (and even fewer in the regions), many FI-4s remain in their position until retirement. Further, members advise that new Deputy Generals tend to bring their own FI-4 with them, eliminating a promotional opportunity for FI-3s in that department. Members recommend more than four levels, while still maintaining the same number of increments for each level.

*I'm only an FI-2, yet I'm a manager, I have staff and I have a budget. I know people in Ottawa don't have that responsibility, yet they have the classification. In the region, we have these generic job descriptions that really don't reflect any of the management responsibilities that are in my job. (FI-2, Gen X, PWGSC)*

**Designations.** The working environment is changing and becoming more complex. Financial Officers in the public sector are being called upon to obtain a designation. Some members feel that the move towards designations is career blocking. Although this direction is generally supported, members say that the lack of funding, inconsistency within and among departments in providing support to obtain designations, and lack of recognition of the expertise of experienced members without designations have hampered their spirit at work. Thus members are calling for a concrete transition plan, including support to obtain a designation.

*There's a focus on getting people with designations into the higher levels of the FI categories. The younger generation has more opportunity to get their designation because they're just out of school and it's still fresh in their minds. In this respect, they have more drive than someone who's been doing the job for 20 or 30 years. I think it might be causing a discord among the generations, because the younger generation seems to be promoted. (FI-1, Gen Y, Stats Canada)*

**Language.** The majority of FI positions have a bilingual imperative. It is viewed, by many members, as an artificial requirement that negatively impacts recruitment, promotions and bringing in regional representatives to the NCR. Most members are willing to learn the other language, even though they do not use it much. Inadequate funding and support for language training has impacted employee spirit at work, for many members see the inability to achieve certain levels as a career blocker.

*With attrition, I see many upper-management positions becoming vacant within five years, but I need language training to be able to apply for them. I've shown promising skills and attributes in other facets of my performance, so I expected that language training would follow, and it didn't. (FI-2, Gen Y, Stats Canada)*

### **Summary of findings**

The factors identified by the Financial Officers are well-known impediments to spirit at work and retention. In particular, not seeing the connection between one's work and the purpose of the organization, not being included in projects involving one's work, an inability to participate in decision making, not being valued or recognized for work being done, and poor communication, especially a lack of respect, stand in the way of employee spirit at work and the desire to stay.

Earlier, it was indicated that the creation of spirit at work is a shared responsibility between the employee and the employer. Most of the initial factors identified by members fall in the realm of the employer and can be changed at little cost.

The second group of specific concerns members identified as impeding their spirit at work—implementation of the CFO model, an out-dated classification system, the new requirement for designations and lack of support to get a designation, along with limited resources and support for language training—are specific to the FI community. Many of these have financial implications.

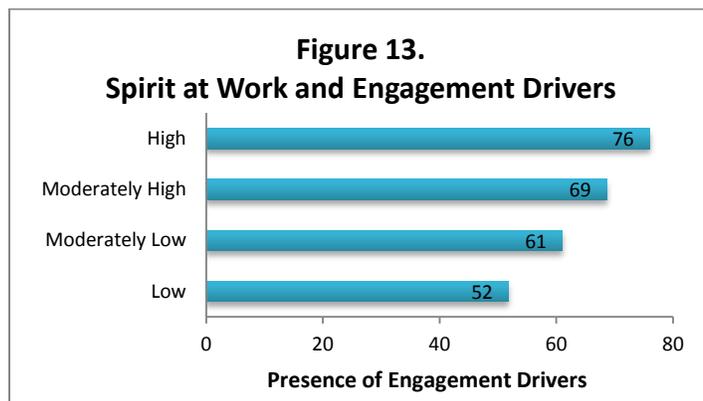
**How members rate the presence of factors known to contribute to engagement and retention**

While there is much overlap between those factors that contribute to spirit at work and retention, the differences are worthy of exploration. This section discusses members’ perception of the presence of these factors (also called contributors or drivers).

Engagement contributors

Members were asked to rate the presence of 13 factors known to contribute to employee engagement. Overall, members only somewhat agree that these factors are present in the public service.

Research indicates a strong relationship between spirit at work and known contributors to engagement, and this was confirmed for Financial Officers. Members with high spirit at work rate the presence of engagement drivers much higher than do members with low spirit at work, as illustrated in the following figure. The ranking is out of a possible 84 points.



What fosters engagement and spirit at work is different for each person; therefore, the weight placed on each driver is also different. Here are the results for four factors: senior management cares, skill development and career advancement, decision making, and personal responsibility.

**Senior management cares.** Employees everywhere want to know that they matter—that their leaders care about them. In fact, the top driver emerging in Towers Perrin’s global research was “Senior management is sincerely interested in employee well-being.” Yet only 25 per cent of the Financial Officers surveyed agree with this statement.

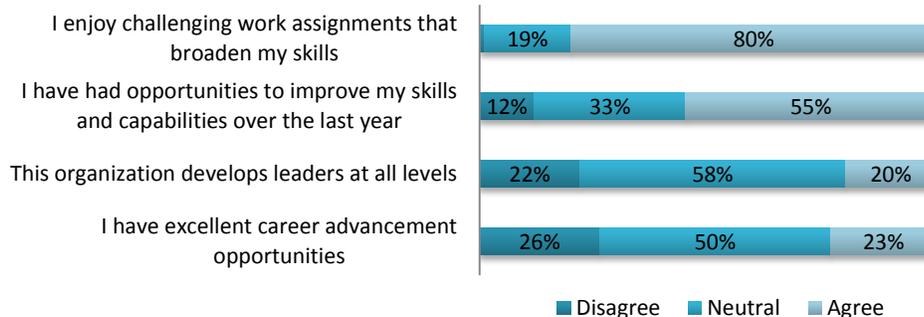
### Senior Managers Care



**Skill development and career advancement.** Opportunities for skill development and enhancement are important to this group. The vast majority enjoy challenging work assignments; more than half feel that they have opportunities to improve their skills.

For many, career advancement is also important. However, only 23 per cent of Financial Officers believe that they have excellent career advancement opportunities, and even fewer agree that their department develops leaders at all levels.

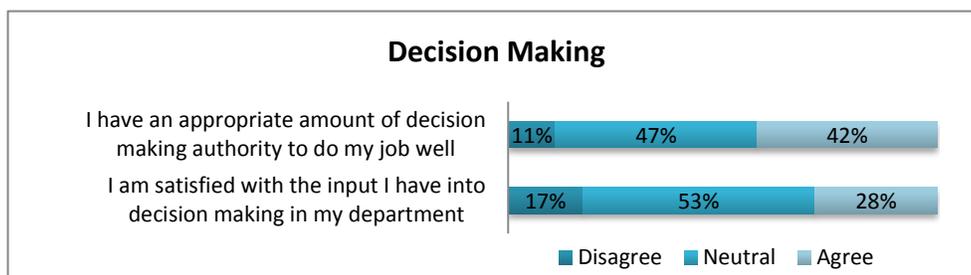
### Skill and Career Development Opportunities



**Involvement and decision making.** Appropriate involvement in decision making is another key contributor to spirit at work and employee engagement. Forty-two per cent of members agree that they have an appropriate amount of decision making to do their job well, but only 28 per cent are satisfied with the input they have into decision making.

*There are a lot of things that you're tasked with, but you don't have the control or the power to be able to enact them. (FI-2, Gen Y, Stats Canada)*

*I am full of information but am not being used to my level. (FI-2, Young Boomer, Health Canada)*



**Personal responsibility.** The creation of spirit at work is a shared responsibility between the employer and the employee. Members agree that they set high personal and professional standards. Almost two-thirds report seeking opportunities to develop new knowledge and skills.



**Generational differences.** Except for two engagement contributors, Financial Officers of different generations rated their presence equally. Not surprisingly, members of the Y and X Generations reported more opportunities to improve skills and capabilities over the past year than members of the boomer generation. Even though the younger generations felt that they had more opportunities, it is important to note that they still only “somewhat agree” with the presence of this driver.

Similarly, members of the Y and X Generations also reported having more excellent career advancement opportunities than members of the boomer generation. Again, even though they reported having more opportunities, overall, members of the Y and X Generations neither agreed nor disagreed with this statement.

### **Summary of findings**

The most pressing concern with regard to factors that contribute to spirit at work and employee engagement is a perceived lack of caring by senior management.

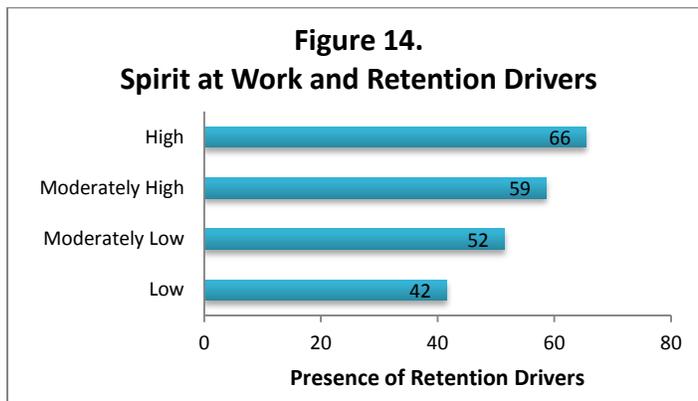
Financial Officers enjoy their work and say they set high personal and professional goals and seek opportunities for improvement. But they are dissatisfied with their input into decision making. They are even more dissatisfied with the lack of leadership development and career advancement opportunities.

As expected, the relationship between spirit at work and the presence of engagement drivers was strong. For this particular group just a one-point increase in engagement contributors is associated with a two-point increase in spirit at work. There is much room for improvement.

Retention contributors

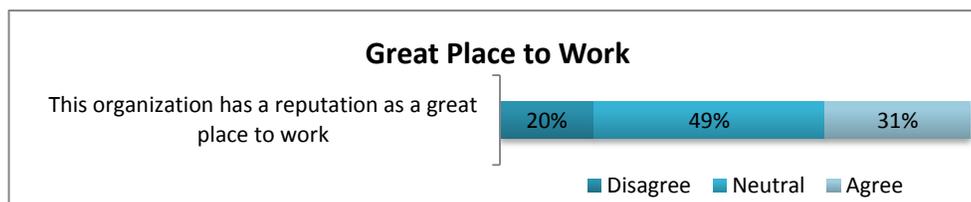
There is overlap between the factors contributing to engagement and retention. The more engaged an employee, the more likely he or she plans to stay with the organization. However, even though they are not actively looking for a job, a number of engaged employees say that they are open to considering another job offer if it comes along.

As for engagement contributors, there is a strong relationship between the presence of retention factors and spirit at work. Financial Officers with high spirit at work rated the presence of the drivers one and one-half times as high as did Financial Officers with lower spirit at work. Out of a possible 84 points, members with high spirit at work gave 66.

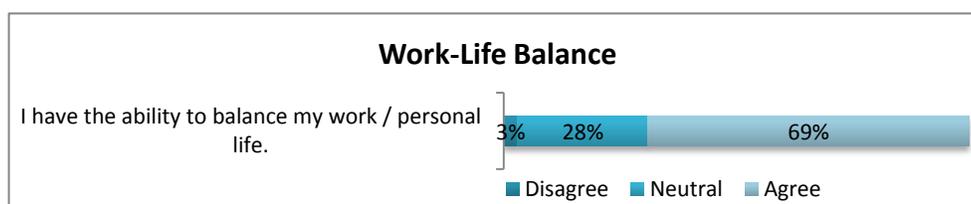


It is not usually just one thing that keeps an employee from leaving their position with the federal service. Here is how Financial Officers rated the presence of six of the more universal contributors to retention: great place to work, work-life balance, relationship with supervisor, how employees are treated, career track and advancement, and support for new ideas.

**Great place to work.** The top global retention driver according to Towers Perrin is the sense that the organization you work for has a reputation as a great place to work. Only 31 per cent of Financial Officers agreed that where they work is a great place.

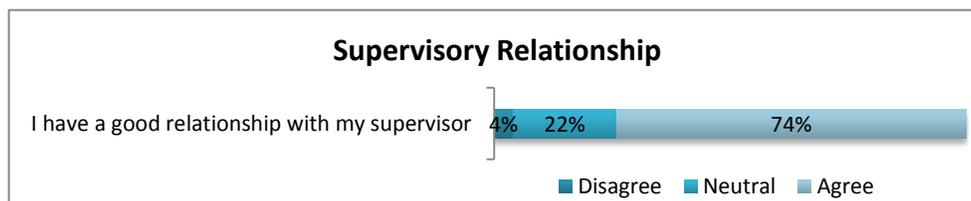


**Work-life balance** is an important concern for members and a factor that played prominently in their decision to work for and stay with the federal public sector. Just over two-thirds of members agree with the statement “I have the ability to balance my work / personal life.”



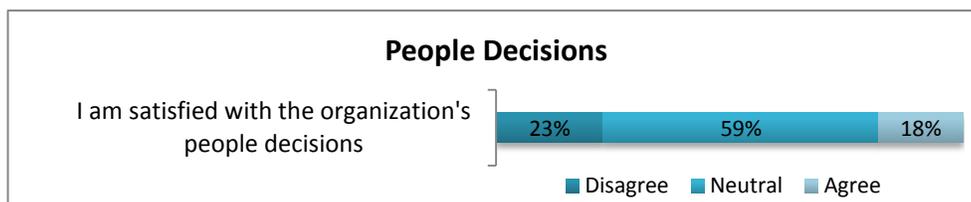
*So I want to be fulfilled in my work and I want to be engaged, and I want to have good spirit but I want that to stop at 4:30 when I get to go home. (FI-2, Young Boomer, Corrections)*

**Relationship with supervisor.** A relationship with one’s supervisor is an important factor in one’s decision to stay or leave. Three-quarters of members agree that they have a good relationship with their supervisor. Note the difference in members’ response to “Senior management in this organization is sincerely interested in employee well-being,” as reported under engagement contributors, where only one-quarter agreed with the statement.



*I just feel incredibly lucky that the directors here are very helpful and that just trickles down. The directors are very open about everything, so the employees feel relaxed and it just works well. (FI-3, Gen Y, Stats Canada)*

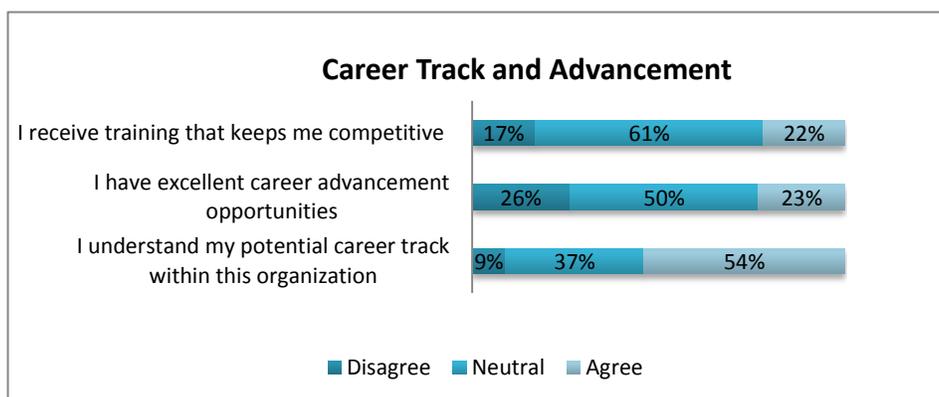
**How employees are treated.** Employees want to know that they matter, that they are valued, respected and have a voice. They want to know that the organization has their best interest in mind when making decisions. Less than one in five of members are satisfied with the organization’s people decisions.



*Sometimes I ask, “Does management really want me to give my best? I love my work, but I am not happy. I do not feel part of the group. (FI-2, Young Boomer, Health Canada)*

*Far too often executives decide to not share information with others who might have a stake or refuse to acknowledge that other people need to be included. I’ll give you an example. An executive made a decision that a Financial Officer was now going to be responsible for a Treasury Board submission. The finance lead did not consult with or inform this Financial Officer, who works in a different unit, nor was he included on any e-mail correspondence indicating this was going to happen. The finance officer found out through his client. (FI-4, Young Boomer, HRSDC)*

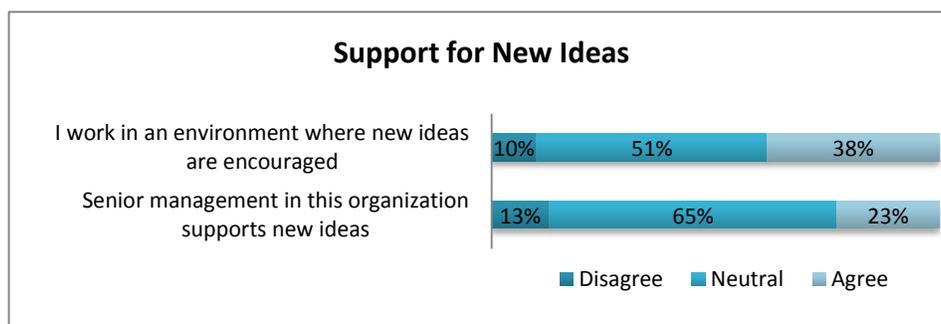
**Career track and advancement** is an important retention driver for many Financial Officers working in the public sector. Whereas just over half of Financial Officers understand their career track within the public service, only one-quarter believe that they have excellent career advancement opportunities. Just over one in five agree that they receive training to keep them competitive. For many, this translates into frustration.



**Support for New ideas.** Financial Officers pride themselves in strategic thinking: solving problems and improving systems. In fact, that is what they learn when completing the highly valued designations. Yet just over a third of members agree that they work in an environment where new ideas are encouraged. Less than one-quarter agree that senior management supports new ideas.

*I've seen an increasing level of cynicism towards the organization. We have had a lot of good ideas, but haven't necessarily been able to put them in place. (FI-4, Gen X, DND)*

*In our training, we've gained a lot of experience in how to manage a business and how to create a section within that business. So when that opportunity arises and there's opportunity to improve how we do business and to also improve management's understanding of their financial situation, that's where I feel most engaged. However, those opportunities are very limited, as I've come to find over the last six months. (FI-2, Gen Y, Stats Canada)*



### Summary of findings

Even though three-quarters of members report having a good relationship with their supervisor and the same amount enjoy work-life balance, less than a third would say that the public sector is a great place to work. They are unhappy with how they are treated—less than 20 per cent of members are satisfied with the organization's people decisions. They are also unhappy with senior management's lack of support for new ideas.

### ***How spirit at work is experienced among the generations***

When it comes to the generations, there is a tendency to focus on differences rather than similarities. Surprisingly, how Financial Officers from different generations experience spirit at work is the same. Perhaps because of the nature and specificity of their work, how they approach it overall is also similar.

*I don't see very many differences when you're talking about work. I work with FIs of all ages. It seems like we all think the same way and we're all generally responding in the same way. When I look at how I work and how my co-worker—who is an FI-3 getting close to retirement—works, I really think we both approach different work situations in pretty much the same way. I don't know if that's the nature of the work or if it's the background. Maybe finance and accounting is such that it attracts the same kind of people and no matter what age you are, there are more similarities than differences. (FI-3, Gen Y, Stats Canada)*

Yet some other differences are apparent. Financial Officers describe these in terms of competitiveness, expectations, work ethic, work-life balance, technology and commitment.

**Competitive nature.** The younger generations tend to be very competitive. Many say that their self-worth is determined by advancement and salary. Most expect to progress and be promoted quickly, without giving up the work-life balance they treasure. The boomers, on the other hand, say they are more patient and are willing to put in the time it takes to progress. They believe that they are more committed to their work so are inclined to work harder and put in longer hours.

*Pretty much everyone in their twenties and thirties has commerce degrees and they, by nature, are competitive. So there are a lot of people asking whether you have your designation yet or if you got your MBA. It just seems to be more of a race to achieve because you know that you will be more respected if you have a designation or if you're pursuing one. (FI-1, Gen Y, Stats Canada)*

**Expectations.** Whether it is a generational expectation, an outcome of the recruitment program (FORD), the competitive nature of the field, or just figuring out how the system works, members of all generations agree that there is a difference in expectations.

*There is a big cultural difference in how the younger generations behave. My generation for example, we love to work so it is no big deal to stay late, but the other generation has different expectations. They want work-life balance, to be respected and have their work respected, and not to be questioned. (FI-4, Young Boomer, HRSDC)*

**Work ethic.** There is a sense that although the younger generations expect to be promoted quickly, they are not necessarily prepared to work hard to achieve the promotion.

*I'm on the cusp of Gen X. There is more of an expectation by people in my generation of moving up quickly and not necessarily working hard for those positions. I don't think it's necessarily that the individual comes in with that expectation. The expectations come from seeing how the system works and how people get positions and promotions. So if someone can come in as an FI-1 and within six months become an FI-2, I think, "Why can't I get that FI-2?" (FI-2, Gen Y, Stats Canada)*

**Work-life balance.** While all generations speak to the importance of work-life balance, the younger generations are more likely to put it into practice.

*My generation has other priorities like their families, so work doesn't come first. (FI-2, Gen X, Corrections)*

*We are not just working 8 to 4. We are working 8 to 4 and getting a designation on the weekends, so our work has turned into six days a week as opposed to five. (FI-1, Gen Y, Stats Canada)*

**Technology.** Technology, embraced by the younger generations, has changed the way people do their work and how they communicate with each other. In many ways, it has divided the generations.

*Whether you are 29, 49 or 59, an FI has to do the same type of work. The amount of effort required is the same. I think the only thing that would impact how we approach work differently would be hesitancy by the older generations to adopt new technologies. (FI-1, Gen Y, Stats Canada)*

**Commitment.** Loyalty and commitment varies among the generations. Whereas the older generations tend to be loyal and committed to the organization, the younger generations tend to be more committed to their professional development and personal advancement. A strong commitment to career advancement by the younger generations impacts retention and sometimes, quality of work.

*I'm happy here but if something comes up that's better, or it's a promotion, I'd be pleased to go—in a heartbeat. (FI-3, Gen Y, Stats Canada)*

*Some of the older people at work have friends in their department so they aren't as willing to leave. We (younger generations) haven't been around as much, so haven't had too much time to develop relationships. So there is no reason to stay, which makes it very easy to pick up and leave. (FI-3, Gen Y, Stats Canada)*

*When people of my generation get promoted to an FI-3 or FI-4 level, sometimes they don't have the experience and they don't have the commitment to really do the job. I say this even though it's against me and my generation. (FI-2, Gen X, Corrections)*

### **Summary of findings**

Indeed, the younger generations seem to be redefining the workplace, which is causing a divide among generations. Their increased educational qualifications, comfort with technology, competitive nature and commitment to career advancement, and expectation for work-life balance are changing the face of work for Financial Officers in the public sector.

**What keeps Financial Officers working for the federal government?**

Clearly, the draw is benefits, security and work-life balance. For some it is the salary. Yet for others, it is passion and an opportunity to make a difference.

Most Financial Officers like their work and feel that there is a match between the requirements of their work and what is important to them. They appreciate the opportunities and lack of risk that come with working for the public sector and have referred to the marketing slogan used in recruitment: *One employer, thousands of opportunities.*

Often referred to by members as the “golden handcuffs” or “the catch for life,” working for the federal government “is so secure a position most employees will put up with anything to keep it.” Having said that, others, even knowing how good they have it, are still looking for job fulfillment and increased engagement. In fact, a few members say that as good as the security and benefits are, they are not prepared to stay without meaningful work.

Here is what some members say about what keeps them working for the government:

*The benefits, security and opportunity. (FI-2, Gen X, HRSDC)*

*The passion. I like my work. I have met the objectives of my career plan. (FI-4, Old Boomer, HRSDC)*

*It is the opportunity and security of the federal government. Also, there are a lot of required improvements, and I'm not yet ready to give up on the idea that I can change this unit. (FI-2, Gen Y, Stats Canada)*

*The pay and the pension. I like the work, I'm not stressed. I'm conservative like an accountant, so for security I will always stay in the government. (FI-3, Gen Y, Stats Canada)*

*I've worked in the private sector and that was a very difficult life compared to working for the federal government. In the private sector you have no job security and the work hours are long and overtime is often unpaid. (FI-3, Gen X, HRSDC)*

*The full package. I've got a great scenario here. I'm an FI-2, so I've got a respectable salary. I've got full medical coverage and the indexed pension and, of course, being an accountant, I see the value in that. There are opportunities to move up whether I stay in a pure FI role or whether I go to one of the AS roles. I can really see how good I've got*

*it. I'm one of the guys who have to pinch themselves when they get out of bed in the morning. (FI-2, Gen X, Fisheries and Oceans)*

*As far as job security, my future is solid, but having said all of that and knowing as good as I have it, I'm still looking for the job fulfillment and an increased level of engagement. (FI-2, Gen X, Region)*

*I am a hard worker and have the designations, so I can certainly go anywhere I choose and make a lot more money. But work-life balance is more important to me so I chose to stay. Having said that, I am a person who looks for change, variety and growth, and working in the government provides me that opportunity without changing employers. (FI-3, Gen X, Region)*

*You can spend thirty years here and never do the same thing for the same year. Any job that exists in the private sector exists in the public sector as well. So there's no need to take that risk. There's no need to hide that you're applying for another position or that you're courting another department; it's permitted. So, that great sense of security outweighs the satisfaction some people have with their jobs. (FI-3, Gen Y, Stats Canada)*

## Discussion of Findings

Spirit at work is about being fully engaged and energized by one's work and feeling good about the contribution one makes through one's work. For Financial Officers in the public sector, spirit at work stems from knowing they are a part of something meaningful where they are making a difference.

### ***Financial Officers' story***

Members like their work and see a good fit between what they do and what is important to them. In fact, two-thirds of the FI community experiences a match between their work and their values, beliefs and work. Yet just over a third of members are satisfied with where they are at with respect to work. Even though they are a highly educated, professional and committed group, it is not surprising, then, that their spirit at work is only moderate.

Many seem to have lost the connection to the deeper purpose of their work: who it is they are serving and why their work matters. They have difficulty seeing how their work fits within the mandate of their organization or how it is helping Canadians.

For the most part, members do not feel that sense of community that is so important to spirit at work. While half feel trust and a personal connection with colleagues, most do not feel a sense of shared purpose and meaning with co-workers. For the vast majority of Financial Officers, the joy, excitement and energy that come from experiencing spirit at work are missing.

### ***The promise of spirit at work***

How much spirit at work Financial Officers have is of interest because of the relationship between spirit at work and work-related outcomes. Spirit at work is good for the employee, the employer and the people being served. Previous research has demonstrated a relationship between spirit at work and personal well-being, job satisfaction, organizational commitment, organizational culture, and retention.

This research project examined and confirmed a relationship between spirit at work and work performance and retention—two critical human resource concerns. It also pointed to a relationship between spirit at work and employee mental health.

The more spirit at work members enjoy, the more they perform. Financial Officers with high spirit at work perform to 90 per cent of their capacity, whereas those with low spirit at work perform to 74 per cent of their capacity. It is not difficult to see how increasing spirit at work positively impacts productivity.

In addition to increased performance, Financial Officers with high spirit at work miss virtually no work at all. Is this because people with spirit at work are extraordinarily healthy or because they are so engaged, involved and committed to their work? Either way, the reduced cost of absenteeism is a welcome bonus. Their colleagues with low spirit at work miss close to two days every month, which adds up to one month each year. At an annual salary of \$75,000, one month of absenteeism alone translates into a \$6,250 loss per year, per member with low spirit at work.

Employees with high spirit at work are also more likely to stay with their organization than members with lower spirit at work. Given the moderate level of spirit at work among members, it is not surprising then that over a quarter of FIs plan to leave the organization in the near future. Although this may be positive for the member's career path, it places an enormous amount of stress on the organization and definitely hinders the quality of service provided—especially given the recruitment challenges experienced in some departments.

But this is not the full story. While studies, including this one, show a correlation between spirit at work and retention, the relationship is not always clear-cut. Research indicates that there is a tendency for engaged employees to stay and disengaged employees to leave. However, other studies have shown that even though they are not actively looking for a job, 40 per cent of engaged employees say that they are open to considering another job offer if it comes along. And half of those who are disengaged have no intention of leaving. In addition to creating the conditions that foster spirit at work, if the employer does not address the factors necessary to retain employees, the risk is that they will lose engaged employees and retain those disengaged.

Turnover is expensive. Studies have demonstrated that the cost of a turnover for a professional position is up to 150 per cent of the employee's annual salary. Although that cost may be reduced somewhat for transfers within the public sector, it is not eliminated. It is far less expensive and more beneficial to ensure that employees are fully engaged in their work.

Finally, employee mental health should be of concern to employers. Not only are employees with excellent mental health happier and more engaged in their work, they miss less work, draw less on the benefits, and are more likely to stay with the organization.

Members with high spirit at work enjoy better mental health than members with low spirit at work. In other research, Kaizen Solutions found a relationship between spirit at work and depression. The more spirit at work employees enjoy, the less likely the incidence of depression.

The creation of spirit at work is very promising for both the employee and the employer. Given the positive impact of spirit at work on employee mental health, work performance and retention, it is worthwhile to examine contributors and impediments to spirit at work.

### ***Assessment of factors impacting spirit at work and retention***

If members enjoy their work and see a good fit, what is standing in the way of higher spirit at work among Financial Officers? Many things. Members' assessment of the presence of factors known to impact spirit at work and employee retention point to areas of strength as well as limitations. The strengths are what is keeping them. Here are some of the highlights of existing contributors and areas requiring attention.

#### **Existing Contributors**

- Members have a good relationship with their supervisor
- Work assignments are challenging and broadens skills
- Many opportunities with one employer
- Understanding of career path
- Members set high professional and personal standards
- A presence of work-life balance
- Benefits
- Security

#### **Needs Attention**

- Senior management doesn't care
- Sense of community is weak
- Lack of connection with deeper purpose of work
- New ideas are not encouraged
- Lack of advancement opportunity
- Lack of training and leadership development
- Employees aren't treated well
- Lack of appreciation and recognition
- Insufficient communication and involvement

In addition to these factors known to impede spirit at work, members identified several concerns unique to the FI community, including implementation of the CFO model, an out-dated classification system, and difficulty in obtaining support for designations and bilingualism. These concerns are only exaggerated by the generational divide.

***The younger generations are redefining the workplace***

We are seeing a shift in power to the younger generations as more members from the boomer generation retire. The finance sector is no different. Whereas members from different generations experience spirit at work in the same way and rate themselves similarly on work performance, their view and expectation of work is different—so much so that some members believe that the younger generations are redefining the workplace.

***Why members do not rate the public service as a great place to work***

The members identified the presence of many factors important to them—challenging work assignments, opportunities for rotations, benefits, security and work-life balance—and these contribute to job satisfaction, but they are not enough to have high spirit at work. Despite these many advantages, less than a third of the members agree that that this organization has a reputation as a great place to work.

Often referred to by members as the “golden handcuffs” or “the catch for life,” working for the federal government is so secure, most employees will put up with anything to keep it. Yet they are looking for more. That “more” is an opportunity to make the world a better place. To do meaningful work and to make a difference in the lives of Canadians. To have spirit at work. Missing factors identified by members include the following.

***The most pressing concern with regard to factors that contribute to spirit at work is a perceived lack of caring by senior management***

Members want to know that they are valued, respected and included, that senior management is interested in them and that they belong. With a pattern of basing promotion decisions on test results and a history of promoting the technically strong employee, more and more managers are lacking the people skills essential for effective leadership and the creation of a sense of community so important to spirit at work. The top organizational condition that fosters spirit at work is inspired leadership. It is difficult to be inspired when you feel that senior management does not care.

*Members want to know that their work matters, that what they are doing counts*

It is not enough to get the assignment done; they want to know who is benefiting and how. They want to see the connection between their work and the mandate of the organization. This is a key element of spirit at work and retention that is missing for most Financial Officers.

*Career advancement is important to Financial Officers*

While members take responsibility for personal and professional development, they are interested in more opportunities for skill development and leadership training. Creation of career goals and plans along with support to achieve them will result in employees' increased willingness to stay longer in a position, a more planned exit of employees, and more fully prepared employees for promotion to the next level.

*The generational unease is not going away*

Acknowledging similarities and learning about and embracing differences will go a long way to bridge the gap experienced by all generations. Much is to be learned from and by all the generations. Not encouraging such learning is a missed opportunity for all members.

Employees everywhere want to be engaged and Financial Officers are no exception. While most members like their work, they are challenged to keep their spirit at work alive. Resolution of the concerns identified will go a long way to improving spirit at work and by extension, work performance and retention.

## Recommendations

### ***How the public service can increase spirit at work and employee retention***

There are many ways to increase spirit at work and employee retention. The creation of spirit at work is a shared responsibility—shared between employees and the organization.

While spirit at work and employee retention go hand in hand, additional factors that impact retention also require consideration. Resolution of the generational unease, so common in today's workplaces, is necessary to move forward positively. And, addressing concerns unique to Financial Officers in the public service will remove some of the disenchantment experienced by this community.

Recommendations to increase spirit at work and retention of Financial Officers fall into four areas: employee opportunities, organizational conditions, generational concerns, and matters unique to the FI community.

#### **1. Provide opportunities for Financial Officers to cultivate their own spirit at work.**

- A. Emphasize the meaning and deeper purpose of the work.
- B. Help employees understand and appreciate the connection between their work and their department's mandate.
- C. Focus on how the work of Financial Officers benefits Canadians.
- D. Cultivate a philosophy of service to Canadians.
- E. Promote a sense of community among members.

#### **2. Create the organizational conditions that foster spirit at work.**

- A. Enhance the leadership in the public sector.
  - i. Inspire leaders to lead.
    - a. Assist leaders to connect with the deeper purpose of their work.
    - b. Educate senior management about the relationship between caring about employee well-being and engagement.
    - c. Emphasize the importance of people skills.

- ii. Re-examine the requirements and process for promotions.
  - a. Base promotions on a combination of test results, education, experience, and people and technical skills.
  - b. Create and implement expectations regarding length of time required in each position before eligible to apply for rotation or promotion.
  - c. Help new recruits to obtain the experience they need in order to compete for job postings.
  
- B. Cultivate relationships across all levels.
  - i. Promote respecting and valuing employees as a priority in the public service.
  - ii. Foster relationships between program and Financial Officer personnel.
  - iii. Create a sense of community among Financial Officers.
  
- C. Improve communication and involvement of Financial Officers.
  - i. Communicate how sharing of information, participation in projects or meetings, and involvement in decision making contributes to employee spirit at work and better products.
  - ii. Give employees a voice. Make sure they are heard.
  - iii. Promote open communication across the Financial Officer community, between the NCR and the regions, and within departments across programs.
  - iv. Improve the image of Financial Officers. Start a campaign that shows the value added by Financial Officers.
  
- D. Support Financial Officers to create and implement a sound career plan.
  - i. Make professional development opportunities—similar to the FORD Program—available to FI-2s and FI-3s.
  - ii. Ensure that each Financial Officer has a career plan, inclusive of available supports.
  - iii. Set consistent standards for eligibility for support (financial, time off, etc.) for designation and language training.

**3. Understand, appreciate and manage the similarities and differences across the generations.**

- A. Build on the similarities across generations.
- B. Help members appreciate the differences in perceptions across the generations.
- C. Promote mentoring among the generations.
- D. Accommodate employee's differences and recognize them accordingly.
- E. Prepare the younger generations for leadership roles.

**4. Respond to concerns unique to the Financial Officer community.**

- A. Develop and implement a consistent CFO model plan across departments.
  - i. Inform all members of the plan and timelines for full implementation.
  - ii. Recognize the requirements that were in place before the CFO model and, for a period of time, find a way to grandfather competent and experienced employees who met those requirements.
- B. Create a new classification system that expands beyond the current four levels to allow for a reasonable progression / advancement.
  - i. Add clear criteria and competency, taking into account experience and education/training and including supervisory differential as a criteria.
  - ii. Ensure new system is congruent with the CFO model.
- C. Find ways to increase spirit at work among members working in policy development.
  - i. Help members who write policy understand the meaning underlying their work.
  - ii. Add variety to the policy positions, for example, include interpretation and training.
  - iii. Improve the image of policy work.

- D. Evaluate and modify recruitment strategies and practices.
- i. Examine the effect of the public service recruitment campaign on employee engagement.
  - ii. Evaluate how the implementation of the highly effective FORD Program impacts new recruits' expectation to progress quickly.
  - iii. Make it easier to get hired using avenues other than the FORD Program.
  - iv. Recognize experience and knowledge gained from other positions. Focus on more than tests.
  - v. To reduce the length of time it takes to fill a vacancy, create a pool of FI-2s and FI-3s.
  - vi. Broaden the recruitment campaign beyond benefits, career opportunities and work-life balance to include meaningful work and making a difference for Canadians.

## Conclusion

The ACFO-ACAF intends to influence positive action within the public service in order to enhance employee engagement among Financial Officers. The aim of this research project was to better understand employee engagement among members and to identify strategies to enhance employee engagement. Four keys areas are identified to achieve the ACFO-ACAFs' goals.

As the ACFO-ACAF advocates to improve engagement, working conditions and appreciation of Financial Officers, the approach called *spirit at work* offers concrete, proven, research-based methods to increase employee wellbeing and job satisfaction. Spirit at work is not a panacea, but it will help employees become engaged and inspired by their work. And it corresponds with a profound sense of well-being, increased work performance and improved employee retention.

Work gives an opportunity to find meaning and fulfillment that employees are so desperately seeking. It provides a way to serve and to make a contribution, to make a difference in the lives of others. It gives a chance to create a sense of community and to belong.

Spirit at work is accessible to everyone. With the implementation of these recommendations, spirit at work can be developed and fostered at both the individual and organizational level for Financial Officers.

**Appendix: Breakdown of member responses on the four dimensions of spirit at work**

Spirit at work is comprised of four dimensions: engaging work, sense of community, mystical experience, and a connection to something larger than self (described in more detail on pages 19-20). For ease of comparing these dimensions, the responses for each item have been categorized into four groups: *strongly disagree*, *somewhat disagree*, *somewhat agree* and *strongly agree*. Responses of “completely disagree” or “mostly disagree” are included in the “strongly disagree” category. Responses of “mostly agree” or “completely agree” are included in the “strongly agree” category.

<b>Engaging work</b>	Strongly - Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
I experience a match between the requirements of my work and my values, beliefs and behaviors.	7%	5%	23%	<b>65%</b>
I am able to find meaning or purpose at work.	9%	9%	32%	<b>49%</b>
I am passionate about my work.	10%	12%	32%	<b>46%</b>
I am fulfilling my calling through work.	28%	23%	34%	<b>15%</b>
I have a sense of personal mission in life, which my work helps me to fulfill.	24%	22%	33%	<b>20%</b>
I feel grateful to be involved in work like mine.	8%	10%	41%	<b>41%</b>
At the moment, I am right where I want to be at work.	26%	17%	23%	<b>34%</b>

### ***Sense of community***

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
I experience a real sense of trust and personal connection with my coworkers.	6%	10%	34%	<b>50%</b>
I share a strong sense of purpose and meaning with my coworkers about work.	14%	17%	42%	<b>27%</b>
I feel like I am a part of a “community” at work.	13%	15%	40%	<b>32%</b>

### ***Connection to something larger than self***

I experience a connection with a greater source that has a positive effect on my work.	23%	21%	32%	<b>24%</b>
My beliefs play an important role in everyday decisions that I make at work.	8%	10%	30%	<b>51%</b>
My deeply held values inspire or guide my work.	8%	10%	35%	<b>46%</b>

### ***Mystical experience***

At times, I experience a “high” at my work.	21%	14%	37%	<b>28%</b>
At moments, I experience complete joy and ecstasy at work.	30%	24%	29%	<b>17%</b>
At times, I experience an energy or vitality at work that is difficult to describe.	23%	26%	34%	<b>17%</b>
I have moments at work in which I have no sense of time or space.	22%	20%	34%	<b>25%</b>
I experience moments at work where everything is blissful.	27%	28%	31%	<b>14%</b>

## About This Report

This report was developed as an independent study conducted for ACFO by Kaizen Solutions for Human Services under the title:

Spirit at Work: The Opportunity to Make a Difference  
A Report to the Association of Canadian Financial Officers

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### About the Author

Val Kinjerski, PhD, helps organizations increase employee engagement, work performance and retention by reigniting employees' love for their work. Known for her expertise in spirit at work, Dr. Kinjerski's highly effective Spirit at Work Program is a change management strategy created from a decade of results-based research and tested in the real world. Her company Kaizen Solutions for Human Services offers a range of services, including consulting services, customized workshops and keynotes. Her recently released book *Rethinking Your Work: Getting to the Heart of What Matters* and its companion guidebook is available now at [www.amazon.com](http://www.amazon.com) and [www.rethinkingyourwork.com](http://www.rethinkingyourwork.com).