

WP.5 Age Management Seminars for Employers

5.1 Development of Content



3L Research Institute





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Introduction

Deliverable 5.1 'Development of Seminar Content' forms the key supporting material for the delivery of 'Age Management Seminars on Employers'. These seminars aim at informing employers on the value and benefits as well as on practices and principles of age management. They will draw from the work conducted and the knowledge accumulated previously in the project as well as from the review of policies and practices through desk research.

Seminar Overview

The population of Europe is ageing rapidly and so is its workforce. Eurostat data show that by 2060 there will be only two people of working age (15-64) for every person aged 65 and above, when the current ratio is four to one. This situation will be accentuated if one adds in that in the period 2012-2035, the baby-boomers, the babies born right after World War II will start to retire (Eurobarometer, 2012). This is the landscape of a new era for European societies and new realities require changes in attitudes, mindsets, policies and procedures. Population ageing is here to stay and what is necessary is to find ways to address it successfully at policy, business, societal and individual levels.

The seminars aim at informing employers of the necessity and benefits for age management and at providing them with the necessary tools for introducing new, age friendly policies and practices.

To do this, the seminars will address the why and how of age management principles. Attending the seminars, employers will learn:

- The benefits of age management
- The possible approaches for implementing age management practices
- Examples of good practices that they can turn to and use as a reference

The discussions during the seminars will evolve around the following key themes as illustrated in the Seminar programme:

- Recruitment and Retention
- Flexible working
- Managing Health
- Learning and Skills Development
- Career Development and Redeployment
- Career Exit and Transition to Retirement

Seminar Content

1. Introduction to Age Management Challenges, Policies and Benefits

Age Management: Why Employers should care?

To define age management, let's turn to the often cited and comprehensive definition given by Naegele and Walker:

“Age management is defined as the measures that combat age barriers and/or promote age diversity. These measures may entail specific initiatives aimed at particular dimensions of age management; they may also include more general employment or human resources policies that help create an environment in which individual employees are able to achieve their potential without being disadvantaged by their age” (2006).

The underlying question here is why employers should embrace measures that forge age diversity in the workplace; is their adoption really necessary, an employer may ask? What if employers did not adopt full heartedly and completely ignore the demographic trends and the policy initiatives? What if we continue with no change?

If we contemplate the scenario that employers stay inert amid the changes in population trends, i.e. the ongoing ageing of the workforce where more workers retire and less join in, then, employers will have to face –among other things-:

- Loss of important human capital
- Shortage of skills and declines in their productivity and competitiveness
- Increasing costs of ageing workforce

However, promoting age diversity should not be seen solely as a necessity; it is undeniably true that the drive for increasing the retirement age and for boosting older workers employment rates is stemming from the irreversible process of population ageing in Europe and the pressure this puts on the pension schemes of European states. On the positive side, population ageing means a continuous improvement of the quality of life of Europeans, that renders people more energetic, healthy and up and going to pursuing active lives when they get old. Hence, it should be noted that, leaving aside the pressure exerted by the demographic trends, still, employers would gain from managing age effectively as it will allow them to grasp the untapped human capital and fully utilize it.

Benefits for organizations:

Age management principles are the tools given to employers to deal with the inevitable ageing of their workforce and as such assist them to:

- Maintain and enhance productivity and competitiveness
- Retain important human capital
- Consolidate an amiable working environment that keeps workers motivated therefore more productive

- Through age management, the organization will increase managerial and administrative capacity

Age management is good Human Resources management, after all.

How to approach age management?

Age management should not be perceived as a cumbersome activity and should not be considered expensive. Some of necessary interventions are part of an overall efficient human resources policy that benefits all employees. Previous research and best practice guide employers who are interested in implementing such measures with a roadmap of the main dimensions of age management that they should tackle. As developed by Naegele and Walker in their seminal work on age management, the dimensions of age management are the following.

- Recruitment and Retention
- Flexible Working
- Health Management
- Learning and Skills Development
- Career Development and Redeployment
- Career Exit and Transition to Retirement (Naegele and Walker, 2006)

However, it should be noted from the outset that in order to implement age management efficiently, changes should not be incremental. The dimensions are linked and as such the benefits accrued from the one feed into the next and the steps necessary to remedy one aspect facilitate the steps in another. Flexibility may require development of new skills, for example, and skills development may render employees more prone to take up flexible work patterns or increase their ability to be redeployed.

To proceed with a concrete age management plan, every organization should have secured the **commitment of senior management and of all those involved in decision making and strategy development**. This should be taken as a pre-condition before any planning. If management is not committed, namely not fully convinced for the necessity and ultimate positive effect of age management, it is more likely that plans will not be successful.

2. Recruitment and Retention

Questions to Consider

How do you recruit and select? Do you often monitor and review your recruitment policy? How do you make selection decisions? Is age a reason for rejecting a candidate? Do you prefer younger employees to older ones?

Employers and Older workers –Stereotypes, Myths and Facts

It is common place that employers hold rather stereotypical views about both young and old employees which have direct repercussions on the latter's chances to enter the labour market and remain in it. Suffice to say, that older employees are viewed in most cases as persons with rigid, nonflexible mindsets, that cannot and do not want to learn new things; on the other hand, young employees are considered more open to change, fast learners and more dexterous with any new technology. Such views are evidenced in many studies conducted over the years regarding employers' perceptions. Research studies throughout the '90s and even more recently have shown that many employers refrain from recruiting aged workers; soon after crossing 40 years of age, employees are considered unwanted for recruitment (Walker,1997). Hence, few employers implement or consider embarking on substantial measures aimed at recruiting or retaining older workers (Van Dalen et. al, 2009).

These myths and misrepresentations regarding older workers, which the majority of employers are familiar with and which are circulated and reproduced from a generation to the next, rise barriers to the recruitment of older workers.

For example, employers tend to think that younger people will stay longer with them because the latter have many years ahead of them, so they are more inclined to offer them training, to invest in them. But, empirically, how often is this statement verified? Actually, one could observe that labor mobility is a more pronounced phenomenon on younger population than on those aged 45 and above. Hence, the reluctance of employers to recruit and invest on the career development of older workers is basically unfounded. Employers should disassociate the chronological age of an employee from their propensity to stay working with their company (CIPD, 2011).

A strategy for removing age bias from the recruitment process: Reaping the Benefits

The objective of an age friendly recruitment policy should be to eliminate age as a criterion for employment, either positive or negative. Recruitment should be based on skills and not age.

'Good practice means ensuring that older workers have either equal or special access to the available jobs and that potential applicants are not discriminated against either directly or indirectly' (Walker 1997).

To effectively introduce a recruitment policy that is age neutral, organizations need to master resources, embrace and communicate an age friendly, non discriminatory mindset

and to holistically approach the changes i.e. **plan, execute, monitor and feedback to the process.**

Employers should understand that an **age biased recruitment policy is a constraining policy**; it constrains your organization from reaching out to valuable candidates.

Let's not forget that your recruitment policy is the first impression you give to future employees and to the society and it conveys the message you want to pass for your company.

In order for any organization to move towards an age friendly environment for the benefit of both its employees and the employer, it has to initiate changes both at procedural and cultural level. It needs to change how it recruits but also how it talks about its employees, i.e. to make changes in language and recruitment procedures.

Unraveling the process to an age friendly recruitment

Initial step: Knowledge of the national and EU legal framework for age discrimination

Employers should be fully aware and updated of **the national and EU legal framework** regarding age discrimination but furthermore, they should communicate this information to their staff. Both employers and employees should know their rights and obligations regarding age discrimination in the workplace.

Review your current recruitment policy and objectives

It goes without saying, that any strategy requires a review of the existing recruitment policy; employers should contemplate exactly how they recruit, what the selection criteria are and how they go about the selection process. A clear and honest view on the criteria employers use can lead to effective and fast changes, by pinpointing the problematic areas.

To introduce new recruitment procedures in the quest of abolishing age discrimination at work, employers should review and re-formulate their recruitment objectives. Any strategy for older workers recruitment should be embedded in a clear recruitment strategy. This will entail the **mapping of the current personnel's strengths and weaknesses** and of the **future skill needs**. This is the vantage point for introducing changes, namely to know where you stand skill-wise and to know what skills you will require in the future to achieve your business objectives.

Draw up the age profile of your organization

To assist you in the review and change of your recruitment policy, you need to undertake an **age profiling** of your employee force. Many employers cannot answer with precision questions regarding the age characteristics of their organization, even in cases of small businesses, because they don't have the necessary data available due to lack of a proper age profiling system. In case you don't have a profiling system, it is advisable to develop one in order to develop meaningful age categories and be able to know at any moment the age structure of your organization.

Age profiling is not just a mere categorization of employees to age brackets; it should be used in combination with other employee profile characteristics, as skills and performance. If used effectively it will give your organization critical information regarding the degree of diversity as well as of the possible over-or under supply of skills and it will vividly illustrate the areas that you need to intervene. It is also the tool that can help you gauge and know at any time the staff turnover in your organization and the projected retirees' numbers.

Train Human Resources personnel on being age sensitive

Developing an age free workplace is not a one off task; it demands continuous efforts and monitoring of the strategies employed. Human resources personnel should be trained on managing employees of different ages and should exhibit an age sensitive approach. They should be aware of all instances of ageism in order to locate it in the business policies and eliminate it. During interviews, it is necessary that all staff adhere to the age equality principles and is trained to conduct interviews following anti-discrimination procedures. It is advisable that selection panels are of mixed age.

Remove all signs of age bias from the organization's language

This entails the review of all internal and external documents that the business circulates to find all instances of age bias. Older issues of such documents can be examined in retrospect and areas that need to be changed should be identified in order to develop a more positive age-free language. Attention should be paid to negative age references made indirectly whereby some communications material 'frames' some statements in a speech that favors young population. Language should reflect an age diverse environment that respects difference.

Review job advertisements

Employers should establish key rules for job advertisement content that is devoid of age bias and it is attractive to aged employers as well. This should be communicated to and adopted by all line managers. **Job advertisements should not make any reference to age but be task and skill specific.** In addition to this, attention should be paid to indirect instances of ageism, for example when references are made to "a team of young professionals' etc. **A disclaimer** should accompany any job advertisement that the organization does not make any discrimination on the grounds of age (including other issues such as nationality, etc). It is advisable not to ask for submission of certificates from high school or university that discourages some older workers from applying not because they are not graduates but because they might not have their certificates handy after the passing of many years since graduation. More importantly, **job descriptions and person specification** should not contain any ageist references and should be built on matching tasks with qualifications and skills irrespective of age.

Take the chance to promote your new face in all internal and external publications

To cultivate and consolidate **a culture of age friendly working environment**, the company should address these ideas in internal communications, and must inform all employees

about the benefits of mixed-age working environments. Whenever possible, in all publicity documents, the organization should mention its policy and views on age.

Best Practices in Recruitment

Barclays PLC

www.barclays.co.uk

Barclays, the financial services group, has reviewed its recruitment policy to enable people over 60 to apply for jobs.

Key actions:

- Reviewed all HR policies to ensure that there was no age bias
- Reviewed their recruitment policy enabling people over the age of 60 to apply for roles
- Developed their job advertisements around the theme “No Age Barriers”
- Raised awareness around age diversity in the workplace
- Focused recruitment for older people in their call centers.

Results:

- Barclays now employs more people over 50 than under 21. The number of people over the age of 55 has increased by nearly 400 in the 2 years after the implementation of the policy. People over the age of 60 were employed in a variety of roles from administrative to senior leaders.

3. Flexible Working

Questions to Consider

What are the existing working patterns in your organization? How will you rate your organization in terms of flexibility? Are you aware of the benefits of flexible working patterns? What are the flexible working patterns that would best suit your organization's profile and assist you in boosting your productivity and competitiveness?

Flexibility at the Workplace: Why to bother?

As the early retirement schemes were very popular and attention was not on keeping older workers in the labour market, in the traditional workplace, flexibility was not sought after for older workers who were left to their own devices until they ultimately leave the company. Today though, flexible working patterns are considered the key factor for facilitating active ageing, for increasing the retention rates of older works in the labour market and improving their work-life balance. In lack of flexible work patterns, older employees that couldn't conform to rigid work schedules were excluded from the labor market. Nevertheless, many employers are reluctant to introducing flexible working patterns; this reluctance may stem from worrying that the introduction of flexible work patterns may be extremely complicated and cumbersome and that it will diminish productivity of their employees, and as such defeating its own purpose.

Flexible Work: Benefits for all parties involved

Flexibility can render an organization **more open to skillful workforce** and as a result contribute to increasing its ability to retaining or employing skilled personnel that it demands for. Flexibility is a key factor for the promotion of a better work-life balance helping older employees to better match a demanding job with family obligations and as such minimize stress, increase job satisfaction and ameliorate their quality of life in general. Managers should not be daunted by the idea of introducing flexible working patterns, they should be open and confident that it will have a positive impact on their organization, if designed and implemented correctly.

To bullet point some of the most important benefits:

- Retention and recruitment of staff with most suitable skills
- Reduction of **absenteeism**, as people take time off for nursing old family members
- **Motivated, healthier and ultimately happier** workforce as it can fully be dedicated to their tasks
- Transition to retirement is eased out
- The social image of the organization is enhanced and the company is more attractive to job seekers (Naegele and Walker, 2006).

Initializing the transition to a new flexible work environment

Firstly, managers should be aware of all available flexible patterns that they can implement; flexibility can relate to time or space. Your business can offer flexible working hours (part-time), flexible schedules, job shares or work from home. There are certain groups of

employees that have a legal right to flexible working and all organizations should be aware and adhere to these rules. An analysis should be made on which patterns are suiting best your business and workforce; it is true that some types of tasks cannot be performed outside working hours or at a distance, knowing the requirements of the jobs in your organization can assist you in deciding what type of interventions you will endeavor. If it is the first time your organization implements flexibility, then it is advisable to start with a pilot scheme in order to see how it works in practice, and remedy at an early stage potential bottlenecks. There is always the case that some training should accompany the new work patterns and managers should be alert and communicate with employees and human resources staff in order to guide the employees to necessary training options.

Enhanced and effective communication is a prerequisite

The key to an effective implementation of flexible working patterns is **good** and **ongoing communication between line managers and team members**, horizontally and vertically. Line managers should make their intentions clear to the employees and initiate discussions in order to establish the patterns that are favorable to both sides. Discussions should take place in **honesty** whereby both sides will explain fully their views. A good level of reciprocal **trust** should exist in order for the strategy to be built in solid foundations.

Explore the options:

Flexible shifts

Flexible shifts can make a huge difference on the performance of aged workforce and on their ability to continue working in the first place. The organization should develop a plan of flexible working hours that will best address the needs of its employees without compromising its productivity. To do so, managers should cooperate with their team members and the latter should communicate among them to come up with a workable schedule.

Job rotation

As studies shown, embarking on a job rotation scheme has been proven to be a good antidote against feelings of monotony and repetitiveness at work, for employees. Furthermore, job rotation is correlated with less absenteeism, something that is the case with all flexible patterns of work. As the evaluation of previous job-rotation schemes revealed, an effective job rotation scheme requires coordination between different levels of the organization, including occupational health and training functions. In order for the employees to be able to rotate between jobs, it is essential that the organization is maintaining, in an ongoing basis, a very systematic record of its employees' skill set.

Work from home

The opportunity of tele-work is crucial for older workers as it gives them the opportunity to work while attending family obligations or recuperating from a health problem and it also impacts positively on their sense of autonomy. Cost wise, it can reduce commuting expenses that would burden the employer or the employee. Technological advances facilitate work remotely. In order for tele-work to be beneficial, questions regarding older workers' dexterity in using new technologies and the respective perception of employers should be addressed.

Line managers should ensure that tasks administered can be done and give a balanced work load to employees working remotely. They should also make sure that they provide the necessary technology or equipment that will facilitate both completion of tasks or communication with the head office. Communication between manager and worker should be very effective and they should have a very good relationship of trust. Older workers have been with their employer for many years therefore they have built long and solid relationships; still it is advisable that the communication terms are explicated.

Best practice examples in flexible working

BT –British Telecom

British Telecom initiated in 2009 the program ‘Achieving the Balance-Flexible and agile working policies’ whose objective was to retain older workers through the provision of flexible working patterns.

It developed three different policies:

- “Wind down” which was giving the opportunity to older workers to cut down their hours and switch to part-time work
- “Ease Down” whereby employees were able to reduce their working commitments as they approach retirement.
- “Helping Hands” whereby employees were offered the chance to take some time off and have a placement in another organization of a different type.
- “Step down” which allows employees at senior levels to continue working but ease down the responsibilities they are taking up.

Results

BT through its flexible working arrangements now has 14.500 employees that work remotely from home, plus 75000 employees who have another type of flexible working arrangement.

BT' own research on the effects of its policy showed that productivity has improved and sick absence and employee turnover has been diminished.

4. Managing Health

Questions to Consider

What is your existing health policy? Have you incorporated procedures to facilitate the work of aged workers? Do you monitor and review your policy frequently? Do you have the appropriate procedures so as employees to communicate their views?

Increasing work ability of older workers

Improving the health status and quality of life of European citizens is a strategic objective for the European Union; it is a prerequisite for long-term sustainability of health and social care systems. Besides the EU efforts, still, health policy is at the hands of national governments and each one has on application a different set of rules to which the organizations should adhere to, a different set of priorities and strategies. The investment on aged workers' health with targeted interventions is seen as a crucial factor for increasing their work ability, i.e. match the worker's individual resources to the work demands.

Benefits of a healthy work environment for employers

One may ask is it important for an organization's management to invest above what is required from the law for its employees' well being, i.e. to promote health instead of just adhering to the legal requirements regarding safety at work. Will any intervention proposed make a difference? Will benefits outweigh the costs?

According to previous studies, promoting the health of aged workforce has a **strong positive correlation to job satisfaction** which leads to fewer absences from work, **less staff turnover** and to the consolidation of an agreeable, **motivating work environment**. Although, at first instance, to take up preventive measures may look costly, this cost is cancelled out by the minimizing of costs for occupational ill health.

What an efficient health promotion strategy should aim for?

A health promotion policy that targets older workers is pivotal in the combat against age discrimination and in order to achieve longer and healthier careers for older people.

Good practice in health protection, health promotion and workplace design means optimizing work processes and the organization of work to enable employees to perform well and to ensure their health and capacity to work (Naegele & Walker, 2006).

Good health management should aim at minimizing health risks of any type and find ways to **maximize the office/workplace experience** so that employees have all the necessary tools to perform at their best. It should be a **positive, proactive** policy and not be restrained to negative measures. Notwithstanding the importance of health promotion and protection for all employees, **there cannot be an all-fits-all policy**; the needs of older workers should be identified and remedied.

Develop a non- prejudiced health strategy for older workers

Management should not rely on the common stereotypes about health and aged workers but should develop its strategy from the **bottom up** addressing the needs of its specific employee force. Every intervention should be a product of **consultation** and of proper **assessment** of employee needs. Otherwise, employers will end up facing large cost bills for measures that are not targeted and have no positive impact on employees. Therefore, a good health strategy is characterized by the involvement of expert practitioners and of the employees themselves. Employers should pull the necessary human resources with the appropriate knowledge but also with the necessary interpersonal skills to whom older employees can reveal their health worries and health problems; a level of trust and sense of confidentiality should apply at all conversations.

Key steps of a Health Promotion Action Plan

Management Commitment

First task is to ensure the commitment of the top management and designate the realistic budget that can be allocated. Managers should weigh projected costs and benefits as accurately as possible. They should avoid being anxious about immediate returns on their investment. A well executed health policy benefits the overall corporate image but it is undoubtedly a daunting exercise to quantify the strategy's contribution in that respect, vis-à-vis more easily quantifiable indicators as level of absenteeism and sickness.

Performing a Risk Assessment of your workplace

This implies the assessment of the impact of the work place on your employees' health, namely the identification of potential sources of problems that could put strain on employees or could be even severely hazardous depending on the type of activities. To do this, you will require expert staff on occupational health issues that will examine and produce an assessment report of your operations.

Engage aged workers in the process

It is expected that employees would welcome the proposal for a change that will have a positive impact on their health in the workplace. However, it may not always be the case; there might be a group of employees that think that regardless of the degree of alterations, there would be no impact on their health or job satisfaction and as such they may not be very cooperative or receptive of the proposed interventions. How the organization communicates the changes has a direct impact on the level and nature of reception. There is always the possibility that older employees would feel physically inferior if employers do not communicate the need for change in the right manner. Older employees should not feel that workplace changes are a product of their decrease in performance but rather a positive effort in order for them to maintain their performance in good levels without experiencing deteriorations at their physical ability levels.

Raise Awareness about occupational health

Even after putting in place all necessary alterations that would allow a pleasant health promoting environment, employees should be informed or even receive specialized training on how to support their health during their work, i.e. making them proactive agents for health promotion. Line managers together with expert health safety staff can inform workers about occupational health issues distribute leaflets or organize events that promote the well being of their employees.

Best practices in Health Promotion and Well being

Ruoka-Saarioinen, a Finish private food factory and broiler production plant, Finland

www.saarioinen.fi

The company developed a ‘Working Capacity Programme’ to help maintain its employees’ work ability.

- Analyzed the work content and their potential for hazard
- Offered health examinations, on-site physical training
- Provided training for changes in work culture and methods
- established a health promotion group to plan and implement changes

Results

There was an improvement on the work environment:

- Work postures were improved through ergonomic changes
- Workers’ interests in maintaining their physical capacity increased
- Sickness absence decreased and work satisfaction improved

5. Learning and Skills Development

Questions to consider

Do you monitor the training and development of your employees? How often do you discuss training issues with your employees? What is your attitude towards investing on older employees training? Have you got in place any mentoring or coaching schemes to forge intergenerational learning?

Older Employees and Training

Research has shown that older employees are a rather neglected group when it comes to training provision (Tikkanen, 2008). The view that is ingrained in both employers' and employees' minds is that the older you get the less training you prefer and need.

In traditional workplaces, employers were not enthusiastic about offering training to older employees and as this view was shared by the majority of them, they were adamant about its correctness and never questioned it. In an environment where early retirement was the 'holy grail' for older employees, a quest fully endorsed by national government policies, investing on training the former was perceived often as waste of resources. Training was for the younger employees, as eagerness to learn and even capacity to receiving new knowledge, were considered attributes of the young.

However, research suggests that older workers are not averse to training, rather if they find that the training provided is relevant to their work they do participate enthusiastically (McNair, 2010). **Hence, it is more a question of gauging their learning needs more efficiently and choosing the most suitable learning methods.** Studies have shown that the main reason for low effectiveness of training is that firms do not consider the ageing personnel needs adequately. It is indeed empirically shown that older workers are learning differently from younger ones and for different reasons (Ropes, 2012). What is necessary is to **discern the suitable learning practices** and develop a **targeted training plan** that will accommodate the needs of older workers.

Benefits of Training

Training is not an abstract concept with undetermined results; it has clear and tangible outcomes. **Training raises the skills of your employees, and more skills translate into an increase in their productivity.**

Organizations that invested in training aged workers report the following benefits:

- It contributed to boosting the overall skills level
- Increased productivity
- They served as a good example for younger employees who see that the company invest on its employees
- Training made employees more motivated as they were enthusiastic about employing their newly acquired skills

- A culture of learning in the workplace makes employees more open to change, fights feelings of monotony and repetitiveness (Naegele and Walker, 2006)

Formal and Informal learning

Before embarking on an action plan regarding training provision in your organization, a distinction should be made between formal and informal learning.

To clarify the terms, we use the definitions provided by Ropes and Ypsilanti (2010):

“Formal training is usually seen as institutionally planned process that has predetermined learning goals, a start and a finish”. An off-site training on a computer software programme could be considered formal training.

Delineating the boundaries and content of informal training is a rather more demanding task:

“informal learning is seen as being naturally situated in the workplace and more focused on experiential learning or learning meta-competences, i.e. critical reflection, learning to innovate, learning to learn) that contribute to an organization’s capacity for change and development” (2010).

Older workers and Training Preferences

It is manifested in research that older workers learn differently than younger ones (Ropes and Ypsilanti, 2012). **Older people tend to prefer informal settings and are less likely than younger ones to participate in formal learning that leads to the acquisition of qualifications** (European Commission, 2012). Based on the same report, ICT courses, that help older employees to stay up to date with technology advances, are the most popular (2012).

Inform, Encourage, Engage, Review: Milestones of a good training strategy

It is often the case, as shown through studies of training in the workplace, that employees both young and old are not aware of training opportunities or what the areas that they need to improve are. Low participation rates may also attributed, that is, to the lack of information about training. Employers should offer **information** and **guidance** regarding the training opportunities available and consult the employees about the best route for them. These discussions can take place during annual reviews or more regularly in a less formal setting whereby line managers will discuss with their employees openly about their aspirations and skills improvement areas.

Also, employees’ enthusiasm should not be assumed but it should be cultivated through clear communication of the outcomes of training for their personal development. Older workers may feel hesitant to participate in training even if they do wish to improve their skills because they are burdened with old stereotypes that associate learning with young people.

To develop a targeted training programme, **employers should consult with and engage older workers fully in the process.** Training provision should not be a top down affair but rather it should work from employees up taking into consideration their needs, their learning preferences, and pace of training.

Promoting Intergenerational learning: a key learning strategy

Intergenerational learning involves the transfer of knowledge from one generation of employees to the next; it ensures the passing of **tacit knowledge** and as such contributes to the **preservation of the experience and knowledge capital** within an organization as well as to better relations among employees.

Usually, older workers are motivated to take part in intergenerational learning as it gives them the opportunity to pass their knowledge to younger generations, so it makes them feel that they leave a legacy behind; they feel that what they have learned will not be wasted after they leave their work. The benefits for the organizations as demonstrated by Ypsilanti and Ropes (2012) and hinted above are multifold: intergenerational learning reinforces **reciprocal competence development**, and contributes to the increase of productivity and of **the social capital in the organization.**

Intergenerational learning can take various forms and you should be aware of the different types and formats that it can take. Some of these are:

- Mentoring
- Tutoring
- Coaching
- Multigenerational Teams

How to introduce IGL in your organization?

Employers **should raise awareness** and **inform their employees** about types of intergenerational learning and talk about their benefits. They should designate the personnel who will be responsible for the implementation, monitoring and evaluation of the process. Once a pool of people express their interest in participating in a IGL scheme, management should discuss their skills and profile and should identify who is going to lead the teams, i.e. who is going to be the tutor or the mentor and who the tutee and mentee respectively. Before embarking on the actual learning, both parts should agree on a set of **learning objectives** which will lead to a set of concrete **learning outcomes**; of course, during the process of learning a series of not anticipated positive outcomes may occur. This leads to another important step of the process which is the **recording and evaluation** of the learning experience which can feed back in the process and enrich it with new information. At all instances, employees involved in the process should have the **guidance** and **support** of designated training professionals and other relevant staff in order to face possible mishaps in the process or miscommunications between the two parts.

Best Practice

Beschäftigungs- und Qualifizierungsgesellschaft mbH , Germany

www.bequa.de

Targeted training of the older unemployed

The aim was to provide opportunities for education and communication to older men in the 45-60 age group, who had been forced out of the labour market.

By concentrating initiatives on the skills required by the economy, the project has sought to provide training which will facilitate a return to employment. To ensure the target group input and that the training is tailored to their needs, the program used a modular system, with different modules addressing different needs. There was use of group work and counseling sessions to offer support and advice in order to promote social and communication skills.

Results

Almost 900 people have taken part in training events in three locations. The majority of participants were aged 40 to 50. Skilled workers and university and college graduates were the largest group.

6. Career Development and Redeployment

Rethink what career development is

To ascertain the importance of career development for organizations, it is better to start with what we mean with the concept of career development. Although it sounds as a self-explanatory term, it is a rather confusing term that is perceived variably from employers and employees alike. Some employers and employees hold a rather limited and old fashioned view of career development as a vertical process of promotion and increase in a salary which involves no further action from both sides, a rather natural, unattended career evolution for good employees. Employees do well at their tasks and they get rewarded and move upwards in the company; that was how development within an organization was mainly perceived. This image of development is in tune with what is called the 'psychological contract' between employers and employees, namely that most people expect to stay with an employer for five years and get a promotion during that time. (King, 2004)

But apart from promotion, it is good to remember that career development can involve the:

- Investment on the acquisition of new skills
- Horizontal movement within an organization, the taking up of new responsibilities in a new department, (redeployment)

The concept of career has also changed; today careers are mobile, fluid and are not characterized by the rigidity and stability of the past days. Hence, we moved to a richer conceptualization of career development which requires more **involvement** from all parties.

Career Development for Older employees: Is it Different? Is it Necessary?

Career Development should be a strategy targeting all employees, **but it should not be a one fits all one**. It is often the case that older employees' career development aspirations are not taking into consideration or it is presumed that they don't have any aspirations at all since they are not in the early stages of their career. Age stereotypes in the workplace also lead to employees being more reluctant and reactive when it comes to discussing their career development plans; hence, they expect their employers to take the lead and initiate discussions. Many employers do not want to invest in the career development of older employees simply because they believe that it is not an effort worth trying; older employees were geared towards early retirement and as such there was no reason to invest in them. The new labour market conditions ask for a change in perceptions and employers should understand the value and necessity of offering opportunities to older employees to develop or reinforce their marketable skills and to keep them alert about opportunities.

Benefits of Career Development

Many studies lead to the conclusion that there is no road to enhancing competitiveness and success if not developing your workforce. Employers should strive to always promoting the

skills of their employees. With effective career development schemes, employers can prepare their workforce to facing the **future skill requirements** and can contribute to their **job satisfaction**, this stands for both young and old employees. For older employees, career development reduces physical and mental stress and thus contributes to the prolonging of an employee's employability (Naegele and Walker, 2006).

The steps for an effective career development plan

An effective career development plan is the one that matches the aspirations and needs of the employee with the needs and strategic goals of the organization. For it to be successful it should involve around:

- Strong management commitment
- Effective communication, opening up the channels-informal and formal- between line managers and employees, establishing a 'three-way partnership'
- Stewardship and Guidance
- Evaluation and Feedback

Discuss and Set objectives

The key to an effective **career development plan** that will maximize benefits for both employers and employees is to have a **coherent plan of the process**. No plan though can end successfully if not premised on a **clear set of objectives**. Employers should **communicate** with employees both formally and informally in order to discuss their development plans in order to come up with a **realistic** plan. These discussions can take place during the annual reviews and appraisals; it is advisable that a personal development plan should be incorporated in the annual appraisal. Apart from these formal occasions, line managers should initiate informal discussions with employees in a casual setting about their plans and goals for the future. Communication should happen in a good climate where both parties trust and are honest to each other. Managers should be attentive and do not be judgmental; they should make employees feel that discussing about potential areas for development does not compromise their position or make them feel inadequate.

Establish procedures –Provide career information

Career opportunity resources should be made widely available to older employees. The organization can establish an internal jobs posting so that employees can be informed about opportunities within the organization. A career advice office should be established or Human Resources specialists should be designated whose task will be to keep employees up to date with career information, offer **guidance** and **support** on how to receive training and upgrade their skills as well as information on market skill trends.

Monitor and evaluate the plan

Each employee should have an Annual Personal development plan that will set the objectives and the steps that need to be taken. This will be the document to return to annually to check whether the objectives were met, what were the potential problems and

to establish new objectives. Training provision and its quality should also be monitored and stated in these plans. This will feed in the assessment of all development practices within the organization in order to set the strategic goals for the next period.

Redeployment

What it is?

Redeployment is a procedure that assists organizations to make best use of their workforce by better coordinating and matching staff with posts. Redeploying employees, old or young, can be a voluntary or involuntary process. Businesses are living organisms and as such they grow or they diversify so they need to change their operations as well close down some departments. Redeployment is a key alternative strategy that business can offer to employees to avoid redundancy and early retirement, it is a positive policy of re-training and retaining employees instead of laying them off. Moreover, apart from the cases of involuntary cases, redeployment should be seen as a policy that allows employees to change tasks, to face new challenges and as such to contribute to their personal development, job satisfaction and to combat monotony and routine.

How to implement redeployment in an organization depends of course on its size and type. Most large organizations have official procedures for redeployment and there are a lot of examples and best practices in the literature.

Benefits of Redeployment

Redeployment helps the organization to **retain important human capital**, i.e. employees with key skills that the company does not want to see leaving. Furthermore, an organization that implements redeployment schemes receives a positive impact on its image as it is perceived as an organization that takes care of its employee force and strives to positively incorporate them in its strategies. This has a positive impact on how employers view their employer and leads to better satisfaction and productivity. It also demonstrates that the organization can manage change in a positive manner.

Key steps for a successful redeployment scheme

The key to an effective redeployment strategy that will be cost effective and will work for the benefits of both employers and employees is to have, on the one hand, a clear strategy of knowing the skills and performance of your employees and on the other effective communication between departments.

■ **Establish Roles**

Management should set the team that will be responsible and will manage the redeployment process and establish that communication is flowing between them and there are not obstacles that lead to miscommunications.

■ **Inform and Engage Employees**

Management should inform employees well in advance about the redeployment option and present to them all the key contacts to who they can address their initial questions and concerns. Furthermore, organizations should offer any additional support necessary such as legal advice on employment rights.

■ Guide and Support

The responsible team should summon the support of other departments within the organization such as counseling services or the occupational health department to ensure that transition to the new responsibilities is done in a smooth manner.

Best Practice

IBM, Italia

An initiative for workers close to retirement age

IBM Italia created several satellite companies to assist its workforce's transition to retirement.

These satellite companies were set up to give experienced managers who were approaching retirement a chance to gradually withdraw from the workforce, while maintaining the parent company's access to their skills and reducing its costs. These managers had extensive experience and top professional profiles, were aged between 55–65 years and had retired from the company to join the satellite company.

Carlsberg Bulgaria PLC, Sofia, Bulgaria

The company initiated two projects in order to **re-qualify older workers**, following its restructuring. The initiatives were developed by the Human Resources manager in cooperation with line managers.

The **first initiative** targeted people of age 55+ and offered them training in the SAP accounting system. Following the training, employees were able to transfer to another department.

The **second initiative** involved the re-qualification of technical staff aged 50 and above. Instead of being dismissed, the workers had the opportunity to receiving training to be drivers.

7. Career Exit and Transition to Retirement

Questions to Consider?

Are redundancy decisions based on age? Do you keep a record of your employees approaching retirement? What are your attitudes towards older employees close to retirement? Do you know the benefits of flexible retirement schemes? Are you familiar with the policy options in your country?

Re-conceptualizing Retirement: Let's introduce flexibility

In the not so distant past, retirement was not a word associated with transition. Retirement was a fixed day, when at one day the employee was a full time worker and the next s/he was staying at home. Hence, retiring was not a process but a point in time. The drive was more about achieving to retire early than to stay in employment. Governments, through their policies, were reinforcing this climate. Older workers were receiving benefits and their pensions were offering them financial security, employers could refresh their employee force with younger employees as they were considering that older employees had passed their productivity maximum and the state could boost the employment rates of the young, new entrants in the labor market.

As the demographic trends started becoming difficult to ignore, so governments started reversing their policies and raising retirement age. This policy drive poses key questions for both employees and employers. The concept of retirement needs to be re-conceptualized and past perceptions should be altered.

The days of fixed and early retirement days are in the past and employers and employees alike should gradually get more acquainted with the idea of flexibility in retirement. The underlying rationale is the open up of the retirement concept, whereby its boundaries are blurred in time and employees are given more options, flexibility and scope to shape their future.

At policy level, many countries, with the UK, Sweden and the Netherlands as frontrunners, have been taking steps to facing the new economic imperatives and to changing the perceptions about retirement; some others like Greece are considerably lagging behind where the old paradigm is still enduring amid the economic crisis.

Benefits of Flexible Retirement

For employees:

Introducing flexibility is beneficial for both employers and employees; it gives the necessary leeway to employees to leave open the date of their final exit from the labor market, to decide if they want to work past the designated retirement age and to **phase out** their exit and not experienced it abruptly. Flexibility helps employees to minimize possible negative repercussions that retirement may exert. It can help them fight feelings of low self esteem and of lack of purpose that may follow after leaving a long career.

Benefits for employers:

With flexible retirement, employers can retain valuable employees so that they do not experience any shortage of skills. A well designed and executed retirement policy adds to the image of the business both internally and externally (Naegele and Walker, 2006).

Developing an age friendly career exit and retirement strategy

Although the policy push is towards more flexibility in retirement and the objective is more people for longer in work; in some cases career exit is desirable by employees and in some other cases it can happen involuntary.

The question is what an employer can do to render the years before retirement, the transition to the latter and the aftermath of a redundancy a smoother experience for employees?

Good practice in this field means basing any redundancy decision on objective job-related criteria and ensuring that retirement schemes offer a choice of options and are fairly applied (Naegele and Walker, 2006)

In the framework of the policy regime that the company operates, employers can examine the options they have available and decide what their retirement policy would be. They should review and decide on the possible flexible working options that they can offer to employees in the pro-retirement stage.

Inform, Guide and Support your employees

In cases of redundancies, employers should stay close to their employees and provide them with **information** and **guidance** about career opportunities; you may arrange training activities for them to assist them in finding another employment and also provide them with counseling services in order to ease out the stress and pressure emanating from being laid off. When employees are in their retirement age, employers can do many things to facilitate the process such as:

- Offer them the opportunity to decrease the hours worked or give them the opportunity to work remotely.
- Organize activities, information sessions to inform employees about retirement, and post retirement work opportunities.

Engage with employees after retirement

Your retired employees remain a valuable asset for you; you know them well and they know your way of working, your personality traits and they are trustworthy and loyal. It would be a great loss to stop the communication and the link between you and do not stay in touch with older employees. Companies should organize events that help retirees stay in contact with former colleagues so that their bonds are maintained.

- Older employees can consult and coach younger employees in various tasks

- They can come in and fill in for an employee who left suddenly or is on leave.

Best Practices

ASDA, food and clothing superstores, UK.

ASDA introduced a flexible retirement policy in order to respond to requests from employees who wished to continue working, to retain skilled and valued older colleagues.

Its flexible retirement policies are informal; still it has removed the concept of normal 'retirement age' from the company's language.

To offer flexibility in retirement, ASDA offers:

- Part-time work
- Job share opportunities
- Different jobs/duties
- Time out of up to three months

Furthermore, all employees are encouraged to volunteer. Company sees the time out spend in contributing to the community as 'part of the job'.

Benefits:

- Reduced recruitment costs
- Reduced staff turnover and lower costs in short term absence sick pay.

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