

### **Training Handbook**



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## Training Handbook Intellectual Output 3



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InCounselling50+

Innovative Counselling to promote the participation of people50+ on the labour market and in societal life

A training to further educate professionals and practitioners with counselling activities with a focus on the target groups employees50+ and jobseekers50+

### An enriching collaboration of:

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### Introduction

This is the training-handbook of the project InCounselling50+. This handbook gives a theoretical knowledge base for trainers. Participants of the training are HR and counselling practitioners. The training's intention is to enrich and sensitize participants through the exchange of practical experience and to promote reflection on a theoretical basis.

The **topic** is employees50+ and jobseekers50+ in the field of human resources and the management (HR or HRM) and counselling. These joint expressions e.g. *individuals50*+ are used throughout all project materials as thematic fixed terms. Due to the ongoing demographic change and improving medical assistance, individuals are getting much older than some decades ago, which influences profoundly work and social life. One of the most crucial questions in this context is how to design a dignified life and surrounding for individuals50+. This question, simultaneously, needs to consider the changing environment and growing challenges of today's and tomorrow's organisations and enterprises. In six modules, the related social and economic topics are discussed from a practical and scientific perspective. In an additional seventh module a practical method to improve mutual learning is covered. This method for mutual learning is called peer counselling.

The training consists of a **face-to-face training and an online course**. The face-to-face training takes three days. There are two consecutive days, and, after approximately eight weeks, a third follow-up day. The third day includes a peer counselling section. In accordance with the training's topics, participants need to bring along a critical real-life case the third day. The six modules provide useful material for exchange and reflection in daily practice.

The online course will help to deepen the knowledge and follows a self-regulated learning approach. It will contain short learning sequences, called Learning Nuggets, and can be also done independently from the face-to-face training. Theoretical nuggets are only part of the handbook. Case studies and the video tutorial are integrated in the trainer guide and workbook. A detailed preparation of the nuggets is done with a separate handbook for the online course. At the end of this introduction, an overview of the training's objectives and the Learning Nuggets are given.

This handbook is the theoretical base for the practical oriented training. The content was selected on basis of the project's needs analysis. However, as this discipline is relatively modern, not all needs and demands could be covered. One has always to be aware that the concepts of age and being old depend on a society's definitions and stereotypes, and furthermore requires research and lecture of current literature. This handbook gives a current overview, even though continuous research is necessary to remain updated.





The training follows a **practical orientation**. This orientation promotes usability and transferability in practice for potential participants from HR and counselling fields. This is why informal learning, network learning, self-regulated learning and a competence orientation are the focus of the training (for more details of the training's orientation, please read the learning concept, which is accessible online at <a href="https://www.in50plus.com">www.in50plus.com</a>.) This practicability gives reason to blended learning methods, various exercises, group work and discussions in the trainings' classrooms. Detailed descriptions and explanations are part of the trainer guide.

The introduction of this handbook ensures a proper understanding of the training's content as well as an adequate use of all other developed **materials**. The other materials are power point slides for the classroom, the trainer guide with schedules and the workbook for participants. The **trainer guide** suggests more detailed explanation on how to realize introductory activities, frontal input, exercises, case studies and discussions in the face-to-face training. The **workbook** covers all necessary materials for participants.

This training integrates a **satisfaction questionnaire** and an **assessment questionnaire**. The assessment is based on the six superordinate learning objectives of each module. In the following, these six objectives are presented:

- Module 1 To analyse labour market statistics and future development trends of the people50+ in order to align an organisation's human capital needs (e.g. strategic workforce planning, succession planning).
- **Module 2** To conclude duties from legislation or sensitization for 50+ and derive possible improvements for organisational processes, e.g. health management.
- **Module 3** To arrange an optimal working environment for individuals50+ under consideration of employee motivation, self-efficacy and self-regulation.
- **Module 4** To derive strategies in accordance with organisational structures, performance measurement and leadership behaviour on how to integrate employees50+, employees in transition and jobseekers50+.
- **Module 5** To apply appropriate methods for securing knowledge and providing information with the use of technology under consideration of the target groups' characteristics.
- **Module 6** To create a holistic and demand-oriented counselling process for people50+.
- **Module 7** To improve the counselling process through peer learning.





Listed Learning Nuggets are partly integrated in the handbook and partly in the trainer guide and workbook. All theoretical learning nuggets are explained in this handbook and are introduced with a corresponding heading in cursive. All practical-oriented learning nuggets are Case Studies and are part of the trainer guide and handbook. There will be a more detailed handbook for the online course that covers all –theoretical and practical- learning nuggets. However, for an overall overview find below a list of all Learning Nuggets:

Module 1 Learning Nugget 1 Croatia tourism labour market

Module 2 Learning Nugget 2 Recruitment50+

Learning Nugget 3 Case Study 1 Health as a key factor for fitness

**Module 3** Learning Nugget 4 Career development theories

Learning Nugget 5 Locus of control

Learning Nugget 6 Preconditions for Learning with 50+

Learning Nugget 7 Instrumental learning 50+

Learning Nugget 8 Case Study 2 Age friendly onboarding (self study)

**Module 4** Learning Nugget 9 Psychological contract

Learning Nugget 10 Six Emotional Leadership Styles

Learning Nugget 11 Case Study 3 Optimal encouragement for 50+ on the

workplace

Module 5 Learning Nugget 12 Strategies for information management 50+

Learning Nugget 13 Knowledge assessment of jobseekers50+

Learning Nugget 14 Case Study 5 Optimal knowledge management 50+

Module 6 Learning Nugget 15 Selective perception

Learning Nugget 16 Decision-making

Learning Nugget 17 Difficulties in counselling

Learning Nugget 18 Case Study 7 Age-friendly recruitment

Learning Nugget 19 Case Study 9 Preretirement Process

Module 7 Learning Nugget 20 Video tutorial peer learning



## MODULE Labour Market 50+



### Training Programme: InCounselling 50+

Name of Module	Workload	Trainer Guide	Workbook
1. Labour Market 50+	120 min	p. 1	p. 1

### **Learning Objectives**

After completion of the course participants are expected to be able:

<u>Superordinate objective:</u> To analyse labour market statistics and future development trends of 50+ in order to align organisation's human capital needs (e.g. strategic workforce planning, succession planning).

### Subordinate objective:

- To understand key relationships and processes on the labour market and their potential impact on an organisational level. (TAX = taxonomy level 2)
- To know most important characteristics and trends of the labour market in the home country, and the EU. (TAX 1)
- To analyse the local situation and perspectives (of the labour market) in the context of their professional environment. (TAX 3)
- To understand the specific features of people50+ on the labour market. (TAX 2)
- To know the measures of active labour market policies and their impact on the labour market position of people50+. (TAX 1)

### **Basic**

- Labour market elements: demand, supply, actors, regulation
- Labour market development: skills shortage, demographic changes
- Labour market statistics and reports
- Active labour market policies

### Employees50+

- Technology, organisation, market, and social changes
- Discussion of the importance of employed50+





### **Employees in transition to retirement**

- Situation of employees in transition
- Economic choices of employees in transition
- Labour market (and other relevant) policies concerning employees in transition

### Jobseekers50+

- Chances and challenges for unemployed50+ on the labour market
- Discrimination (of unemployed50+) on the labour market

### **Learning Nugget (self-directed online course)**

Learning Nugget 1 Croatia tourism labour market





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### 1. Current labour market statistics and trends

### 1.1 Demographic change

Demographic change in European countries occurs due to several phenomena like better medical assistance, higher life expectancy and decreasing or stagnating birth rates. Table 1 below gives an overview of the current population, percentage distribution of different age groups, fertility rate as well as life expectancy at birth, at 65 years and healthy life expectancy (Eurostat, 2015). The fertility rate states live births per woman in the three given countries. The rates demonstrate a low level in almost all European countries including Germany, Croatia and Poland. The current level is too low to allow a reproduction of the population. Specific consideration is given to the indicator healthy life expectancy. In contrast to the traditional life expectancy – measuring the duration of life – this indicator is supposed to provide information about quality of life or livability. This makes particularly sense when comparing figures about growing retiring age across European countries.

(2014) 2015	Germany	Croatia	Poland
Overall Population	81.197.537	4.225.316	38.005.614
Fertility rate	(1,47) 1,50	(1,46) 1,40	(1,32) 1,32
Percentage of 50-64 years	22 %	21,4 %	21,1 %
Percentage of 65-79 years	15,4 %	14,2 %	11,4 %
Life expectancy at birth	81,2 years	77,9 years	77,8 years
Life expectancy at 65 years <sup>2014</sup>	19,9 years	17,5 years	18,4 years
Healthy life expectancy	Male: 65,3	Male: 55,3	Male: 60,1
	Female: 67,5	Female: 56,8	Female: 63,2
Healthy life expectancy at	Male: 11,4	Male: 4,7	Male: 7,6
65 years	Female: 12,3	Female: 4,5	Female: 8,4

Table 1. Demographic change (Eurostat, 2015; Eurostat, 2017a; Eurostat, 2017b and Eurostat, 2017c)

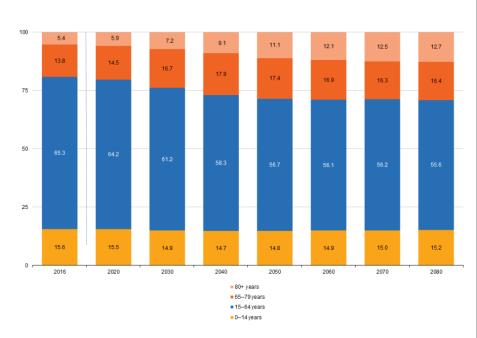
The figures above state the current percentage of people above 50 years in the population.





Forecast statistics like in graph 1 below show an extreme transformation for the percentage distribution of older age groups until 2080. The share of the population aged 80+ is expected to grow from 5.4% to 12.5% until 2080. In contrast, the group of persons aged 65 to 79 years is only expected to grow 2.5% (from 13.8% to 16.3%). While the part of the population aged 15-64 years should decrease around 10% (from 65.3% to 56.2%),

children and adolescent agegroups are not expected to change 2080. until (Eurostat, 2017d). This demonstrates that problems maintain the economic productivity and to ensure liquidity for the pension payments that are going to aggravate in the future.



Note: 2016: estimate, provosional. 2020–80: projections (EUROPOP2015). Source: Eurostat (online data codes: demo\_pjangroup and proj\_15ndbims)

Graph 1: Distribution percentage among age groups in the EU (Eurostat, 2017d)

### 1.2 Labour force potential

The following two tables give an overview of the national labour force potential, the active population aged 55+ and important data about retirement. To find comparable data can be difficult as some studies and surveys focus on distinct age cohorts, e.g. 50+ or 55+. Although the training focuses on people50+, sometimes only reliable data 55+ were found. In addition to that, the calculations of unemployment and employment rates vary from EU country to country, as well as the calculations below from Eurostat. If a trainer considers it important to specify national figures and particularities, they can give more input and information. Again, the retirement age is raised due to European regulations (Morschhäuser & Sochert, 2006). Depending on the phase of the business cycle, early retirement was promoted with subventions during recession and hindered during boom phases by cutting its budget (Morschhäuser & Sochert, 2006). Along with a growing life expectancy and healthy life expectancy, individuals nowadays remain more active, even after retirement. It can therefore





be beneficial to encourage individuals50+ to stay employed longer than the legal regulations intend. Further activity options after retirement can be volunteering or social engagement. However, the activity level depends on the individual as well as the physical demands of one's work. Employees with demanding physical works often face limitations after a long work life (WHO, 2016) and should be granted early retirement or adaptions of the work place or the work conditions. Inactive persons are not part of the labour force. It is to say, they are neither unemployed nor employed, for instance housewives or -men, pensioners, volunteers, trainees without payment (International Labour Organisation, n.d.). The topic health in the work place is addressed in Module 2.

Labour Force Potential				
	Germany	Croatia	Poland	
Overall active population	39.175.900	1.563.700	15.811.600	
(AP) (20-65)				
Percentage AP of overall	78 %	60,5 %	67,8 %	
population				
% 55-65 active population	66,2 %	39 %	44,3 %	
% 55-65 inactive population	4,6 %	16,3 %	7,5 %	
Legal retirement age <sup>2</sup>	M & F 65y6m	M 65y; F 61y3m	M 65y7m;	
			F60y7m	
Future retirement age = 67,	Until 2031	Until 2038	Until M 2020/F	
established until			<del>2040</del>	
			Abolished	
			in11/2016	
Early retirement age	63y6m	60		
Contributory period (for	35y (35y)	15y (35y)		
early r)				

Table 2. Employment after 55 and Retirement (Eurostat, 2017b)

### 1.2.1 Employment rate 50+

Besides the problem of maintaining the economy's productivity, the demographic change also shows severe consequences on the pension systems. With regard to this, the EU passed a regulation with two specific requirements. First, to raise retiring ages to 67 years in all European countries, and, second, to raise the employment rate to a minimum of 50 % for people aged 55 years and older (Morschhäuser & Sochert, 2006). The addressed countries in this training (Croatia, Germany and Poland) were able to increase the employment rates





for people55+, even though some did not reach the requirement of 50 %. Bringing the aspect of healthy life expectancy into play, this can be the reason for not being able to reactivate or recruit some people50+. Keeping in mind that the healthy life expectancy can also depend on the level of physical demand at work. Thinking about the generation of employees50+, one can resume that they have tended to work mainly in manual and craft occupations. Carrying out several years of physically demanding work often goes along with health limitations or physical restrictions. For those employees, it is necessary to establish new opportunities either inside the company or on the labour market. First, inside a company they can overtake more cognitive demanding work to make use of their expertise and to onboard new employees. If it is not possible for an employee to stay in the company, there should be more possibilities to change activities or profession. Therefore, new regulations are required. Under consideration of these facts, it has to be noted critically that the 50 % goal of the EU might have been a little overenthusiastic. For future generations, this goal is realistic, since the European Union and member countries strive for a knowledge society (Rodrigues, 2002) which can be opposing to recent labour market structures.

Employment rate 55-64	Germany	Croatia	Poland
2006	48,1	34,1	28,1
2011	60,5	38,2	36,9
2016	68,6	38,1	46,2

Table 3. Employment rate 55+ (Eurostat, 2017e)

Keeping people longer on the labour market is beneficial as the economy's productivity level can be maintained easier and more contributions are made to the pension system. However, current statistics also show that the productivity level cannot remain on the same level by only reactivating and recruiting individuals50+. More labour resources can lie in employees from abroad (Barslund & Busse, 2016). Although it is not directly the topic of this training, this issue is included in Learning Nugget 1: Croatia tourism labour market. The addressed individuals50+ include housewives, long-term unemployed as well as employees50+ in reeducation or taking on new professions.

### 1.2.2 Economic components of a company's productivity

For the sake of simplicity, one firm produces output using two types of input: labour and capital. Under this assumption, a firm's short-run production or produced output depends on the amount of labour input and capital input. (Mankiw, 2012)

**Technological change** results in lower production costs and higher quality products. Changing product demands result in technological change, which in turn changes the





demand for needed labour for producing commodities. This does not mean that technological change goes along with an overall increase in the unemployment rate. (Mankiw, 2012)

A second effect involves the introduction of automation. The effect of this change in any given labour market depends on whether this type of labour is a complement to or a substitute for employees. (Mankiw, 2012) For instance, enterprises will be more reluctant to lay off workers who have received training opportunities by the firm. Similarly, in markets with substantial shares of training costs, enterprises are more likely to rely on overtime hours rather than using additional employees. Thus, enterprises with highly firm-specific training are expected to have smaller employment changes (turnover) during the business cycle.

### 1.2.3 Learning Nugget 1 Croatia tourism labour market

After Croatia became part of the EU in 2013, it became much easier for Croatian workers to find work in other EU countries. The emigration of Croatian workers (mostly young people) was particularly amplified in 2016. It is estimated that in that year, between 50.000 and 100.000 Croatian people went abroad to work in other EU countries, mainly in the service sector.

Tourism as an important branch of the Croatian economy, recorded a strong growth of over 7 % in 2016. Forecasts for the summer of 2017 were even better. When the tourism industry started recruiting seasonal workers in spring 2017, there were big recruitment problems. Due to a lack of candidates, many companies could not fill vacancies for seasonal work. The tourist traffic and -branch continued to grow during the summer of 2017, in some regions even over 10 %, and firms struggled with the constant shortage of workforce. In winter 2017/18, the Croatian government reduced some fiscal burdens for work in the tourist sector. Thus, employers announced significant increases in salaries for employees.

Forecasts say that the tourist traffic is expected to keep on growing in the upcoming seasons. A crucial issue Croatia has to face is how to increase the labour supply in the Croatian tourism sector. It also remains open how the wages in this sector are going to react and how wages of affected sectors are influenced.

### End of Learning Nugget 1

### 2. Labour market

The difference between national, local and internal labour markets need to be highlighted. In a **national labour market** job search by employers and firms takes place on national level. In reality, many cases of job search takes place at a local level, in a **local labour market**. The markets for college professors, top management positions in large corporations, and similar





occupations are national labour markets, as there are less employees. Secretaries, carpenters, truck drivers, electricians, are usually employed through local labour markets. An **internal labour market** is said to exist when firms fill higher level positions by promotion from within the firm. Firms often rely on internal labour markets because:

- this reduces hiring, onboarding and training costs,
- it improves employee morale and motivation, and
- it reduces the effect of uncertainty (since the firm has already observed worker productivity). (Ehrenberg & Smith, 2018)

### 2.1 Classical goods model: the labour market

There are different approaches in economy that explain how the price of wages is determined. One traditional way to analyse the labour market is the classical model of the goods market. The supply and demand of labour can be explained with two simple graphs. In the following, the mechanisms and preconditions of this model are explained. This helps to understand basic functions of the labour market and how current labour market situations are reflected in this model, and make it obsolete.

The **labour supply** graph represents the interest conflict between work, namely earning money, and enjoying free time. The more you work the less free time is available. The **labour demand** graph shows that more and less expensive labour for the same work can be demanded. The equilibrium settles where both graphs meet. This equilibrium shows the wage that employees receive when they are hired. (Mankiw, 2012)

Both graphs can **move** to the **right** or to the **left**. These mechanisms demonstrate an increase or decrease in the supply or demand of labour, and go along with a rise or decline of wages. There are several possible reasons for movements, for the supply (e.g. more/less employees; employees provide more/less work) as well as for the demand (e.g. more/less technological innovations in this market replace more/less employees; more/less consumption of the market's products).

### 2.2 The classical goods model in reality

Like all theories, the classical goods model underlies several assumptions. Nevertheless, it has to be mentionend that current labour market characteristics make this model obsolete, nowadays more than ever before. Returning to the topic, the four preconditions *perfect competition, profit maximizer, perfect information* and a *homogenous labour supply* are only partly fulfilled. In the EU, older age cohorts have a growing distribution percentage of population, and additionally are becoming more heterogenous by ageing (Morschhäuser & Sochert, 2006). Therefore, the precondition of *homogenous labour supply* is disproved. Moreover, it is impossible to be perfectly informed about the labour market. Vice versa, it is





difficult for employers, HR departments and counsellors to be perfectly informed about employees50+ and clients50+. This is content of the next section *information asymmetries*. Even though not all preconditions are satisfied in this model, it gives an overview about impacts and consequences of labour market trends.

Besides the four partly fulfilled preconditions, there are further aspects reflecting the labour supply's diversity realistically. For instance, wage differences are not considered in this model. Employees with the same **educational** background and equal working conditions can earn differently. What are the reasons for these differences? The above-explained model only focuses on monetary values. The differences occur due to varying working conditions, like security, day and night shifts, more or less attractive jobs and/or job environments.

Another crucial aspect is **human capital**, which is defined as an individual's potential or production factor. It was gained by the investment in education over time. It is tied to each individual, and is, therefore, not directly exchangable. According to the theory, during the education process, a student faces a loss or absence of income. However, this absence comes along with better knowledge and know-how and is later substituted with higher wages. Investing into education today means a future productivity increase. Hence, individuals50+ are considered to have the highest human capital.

Furthermore, differences in individual **physical and mental qualities** have to be considered, which get visible with personal talents and performance potentials. These factors and their influence on wage are hard to estimate and cannot be measured exactly. Specifically, with the age physical abilities tend to decrease while mental qualities generally increase.

In some cases, the government has to intervene in the natural market regulation. To set a **minimum wage** protects several groups of employees. In this way, the government guarantees the participation of the entire labour force on the market, also in the long run. The minimum wage is settled over the equilibrium wage and usually doesn't affect trained, skilled, and qualified workers. Anyways, this instrument has to be used carefully. With regard to the match of supply and demand, the establishment of a minimum wage always is accompanied by unemployment. (Mankiw, 2012)

### 3. Information asymmetries

On the current labour market, imperfect information is common because two contracting partners do not always have all information above the other party in a transparent manner. This can be due to several reasons. First, one party might not want to provide all information. For instance if an employee does not want the employer to know about health limitations in order to appear strong and capable. This is especially the case for individuals50+. In turn,





employers can appear not transparently when it comes to the employer brand. The promoted employer brand can differ from the performed or lived employer brand that is reflected in organisational values (Rothwell, 2010). This can lead to misunderstandings or asymmetries of assumed values or preconditions. Another problem for employees50+ can be an enterprise's online appearance, to which they might not have access. This can be because the employees don't have appropriate equipment for it, or they might not have according skills to use it. However, it has to be mentioned that the internet in general helps to improve information asymmetries. Nevertheless and generally speaking, all information is incomplete but symmetric. The agent and principle theory shows possible consequences of incomplete and symmetric or asymmetric information. That is to say that two parties, an employer and an employee, have two different status of information. This information difference can be easily overcome by getting to know each other. In contrast, if the information gaps cannot be overcome, these asymmetries can lead to market failure. Big information gaps can lead to avoidance behaviour by one party. In this case, both employer and employees perceive insecurity and, as a result, do not agree to the contract. (Eisenhardt, 1989)

Being aware of information gaps and asymmetires can help to clarify expectations. A possible preventive action can be a psychological contract, which is content of Module 4. The ability to reduce asymmetries and bridge the gaps, require a sensitization of all partners' responsibilities. To raise awareness among HR and counselling practitioners is of importance, because employers currently experience vast information asymmetries about 50+ expectations and needs. The following Module 2 clarifies corresponding topics, e.g. how can enterprises contribute to an improvement of employees' health conditions and work environment and, thus, keep them fit and employable. In 2002, a Finnish study found 50 % of men and 60 % of women to be long-term ill (Morschhäuser & Sochert, 2006); 40 % affected by and affecting the own work, esp. in physically demanding jobs (Ilmarinen, 2007)

In this context, the referral lies upon HRM (human resource management) and applied instruments, such as improving theoretical and practical employer branding (Rothwell, 2010). This means that the employer brand represents the practically applied values. Furthermore, recruitment, onboarding, retention and staff development (Morschhäuser & Sochert, 2006) should be adapted to particularities of the generation50+. While the listed constructs are specified in the following modules, this Module 1 focuses on succession planning and demographic management (Carbon, Heindl, Süßmuth & Wiesenewsky, 2014), in particular related to recent market trends and forecasts.

### 4. Translation of market trends

It is important to start with an analysis of the current enterprise's situation. Then, further scenarios can be considered that allow organisational change and improvement. This refers to other topics e.g. employer branding, recruitment and onboarding of individuals50+. These





topics are covered mostly in Module 2, 3 and 4. In the beginning of the training it is crucial to be aware of the current enterprise's situation. Hence, in the following section, demographic management and succession planning are addressed and related to the labour market forecasts, which were explained in the beginning. This topic is strongly related to HRM. For counsellors this section provides deeper insights in HR functioning and promotes a better understanding. Then, clients' consultations and the support for reintegration in the labour market can be enhanced.

### 4.1 Demographic Management

In the prior sections, the processes of demographic change were emphasized and consequences for society and the economy were explained. Besides the general consequences, it is important for a company to understand how the own staff is affected by this change. This means that particularly HRM needs to be aware of and track the age structure of own employees.

In several studies, it could be shown that enterprises in need of change, due to demographic change, benefit enormously from analysing their own age structure (Morschhäuser & Sochert). This is of high importance, as it demonstrates a sensitization process and, consequently, ensures a better planning of human capital and resources in the long run. Furthermore, accompanied methods are improved, for instance health management (Carbon et al., 2014).

As shown above in scope of demographic change, early retirement was not longer promoted financially from the government. However, due to the prolongation of European retirement ages, more individuals with physical demanding work would need more often an early retirement. Carbon et al. (2014) found that in Germany and Austria only 5 % of companies state that they feel supported by politics. However, despite the perceived shrinking political support, it is an enterprise's duty to remain updated and ensure continued persistence.

For a continued persistence, human capital or employees are the most crucial component. As Carbon et al. (2014) shows, an enterprise needs to collect and analyse information and, thereupon, develop and implement methods. They state that many enterprises are well aware of the on-going demographic change. However, many do only collect and analyse information, but do not develop methods. They further report that enterprises who don't face a skills or labour shortage remain in the status of information search. It stays unclear whether these enterprises actually do not face any shortage or whether they lack a good informational situation (Carbon et al., 2014).

Returning to those enterprises who develop and implement methods to tackle potential problems along demographic change: As shown above, the entire labour force is going to shrink in the future decades (Eurostat, 2017). Usually, human resource planning is done in





the short run for one year in advance. Nevertheless, to face demographic change it would be useful to prolong the planning horizon from one to three or five years (Carbon et al., 2014). This would facilitate employers' active participation in retiring which half of the surveyed employees reported (Carbon et al., 2014).

In the project's as well as other surveys and interviews, it was revealed that the informational situation differs extremely between EU countries. The informational situation about the own staff and prospecting retirements including retirement models and fluctuation, makes it necessary to consider or reconsider the own age structure and possible opportunities and/or obstacles.

### 4.2 Succession Planning

Pension plans bring up another crucial human resource topic: succession planning. Under consideration of the decreasing labour force potential and the soon retiring huge baby boomer generation, enterprises need to think about how to secure know-how and expertise. This topic is also of high relevance for counselling practitioners. To gain insights in this planning, counsellors can improve their consultations and promote a better preparation for jobseekers. The percentage distribution of retirees is a lot higher than some decades ago and will remain high for the upcoming decades. It is to say that in the short run, many employees can retire and that enterprises need to secure important know-how, as well as to choose and board on successors.

Rothwell (2010, p. 10) defines:

Succession planning and management (SP&M) is the process that helps ensure the stability of the tenure of personnel. It is perhaps best understood as any effort designed to ensure the continued effective performance of an organisation, division, department, or work group by making provision for the development, replacement, and strategic application of key people over time. An SP&M program is thus a deliberate and systematic effort by an organisation to ensure leadership continuity in key positions, retain and develop intellectual and knowledge capital for the future, and encourage individual advancement.

In this sense, the human resource department plays a crucial role to ensure succession planning. To guarantee a harmonic succession of the overall enterprise, the strategy of human resources should be connected with the enterprises strategy (Rothwell, 2010), for which the following seven steps are recommended:

- 1. determining the purpose, goals, and objectives of the organisation and the HR function;
- 2. scanning the external environment to identify future threats and





opportunities affecting HR inside and outside the organisation;

- appraising the organisation's present strengths and weaknesses, in particular HR strengths and weaknesses;
- 4. examining the range of strategies and HR strategies available;
- choosing an HR strategy that is likely to support the organisational strategy;
- 6. implementing HR strategy through changes in such programs as training, selection, compensation, benefits, and labour relations; and
- 7. evaluating HR strategy periodically for how well it supports organisational change (which helps to achieve its strategic goals and objectives). (p. 122).

The abovementioned steps are often not well established between human resources and strategic company planning. If both strategies lack harmonization failures can often result from this (Rothwell, 2010). To ensure a harmonization, it would be urgent to valuate human resource management equally to finances and marketing. Morschhäuser and Sochert (2006, p. 33) provide a quick check for HR policies and their future-orientation to this regard:

	Tends to apply	Tends not to apply
1. Your age structure consists of equal proportions of young, middle-aged and older employees.		
2.The work activities are designed so that employees can perform them up to the age of 65.		
3.The employees are actively involved in the design of their working conditions.		
4.The company readily succeeds in training or recruiting enough young skilled workers.		
5.All employees – also older ones – are given the opportunity to obtain qualifications and expand their competencies.		
6.The exchange of knowledge between older, experienced employees and young workers is systematically promoted.		
7.The prospect of career development is offered to all employees.		





Extracted from Morschhäuser & Sochert, 2006, p. 33

Regardless of the internal value of HRM, there can arise further problems when it comes to succession planning. Three problems are explained below.

First, despite the great opportunity lying within the management and planning of successors, enterprises face several difficulties, for instance the question whether to inform a potential successor about the plans or not to promote competition within the staff or clients. Enterprises usually use one of the following procedures to fill vacancies (Rothwell, 2010, p. 109):

How are decisions made about successors for positions in your organisation?

- We usually wait until a position is vacant.
- We secretly prepare successors.
- Whenever a position opens up, we rely on expediency to identify someone to fill it, hoping for the best.
- · Other methods:

It depends on the position. For some unique type jobs or some higher managerial, we are planning succession ahead; otherwise do not plan.

Do cross training to assure backups at lower levels but nothing at higher levels.

We keep our ears and eyes open in the marketplace for people who could be good employees.

As mentioned in the prior section of demographic change, enterprises frequently don't to develop and implement methods proceed after the information search and analysis (Carbon et al., 2014). This shows that no concrete action planning is taken, and emphasizes the importance to raise awareness among enterprises to be better informed and manage better the succession. In this context, it has to be repeated that the horizon for this succession planning should be extended to three or five years (Morschhäuser & Sochert, 2006).

Second, in process of implementing succession planning and management, the following aspects should be considered (Rothwell, 2010):

- Tracking possible replacement needs due to any dismissals;
- systematic approach to appraise individual employee's performance;
- systematic approach for the identification of high-potential employees;
- systematic approach to foster the identified high-potential employees. (p.113)

Replacement needs can be detected through an age structure analysis or a SWOT (strengths, weaknesses, opportunities and threats) analysis, as suggested in the prior section. At this point, it needs to be highlighted that one of the most crucial factors for





individuals'50+ further activity is their health condition (Morschhäuser & Sochert, 2006). This has to be taken into account in the SWOT analysis. In addition, it might be useful to reflect the working conditions and the work place concerning health and age-friendliness, and whether it represents a strength or weakness. A good age structure analysis also covers an examination of the staff's working ability. The topic of health management and working ability is addressed in the following Module 2. Performance appraisal is topic of Module 4. The identification of knowledge resources is treated in Module 5. To return to the topic, the consideration of high-potential employees brings up another important topic. The growing divergence between high and low qualified employees or highly or less capable employees.

Third, in current succession planning literature, most often high potential employees are highlighted (Rothwell, 2010) as they inherit important key resources and competences. Anyways, it also has to be underlined that enterprises put a higher value on specific capable employees and forget about low qualified or older employees. These are most often employees, who ensure production continuity. It was found that those employees are often excluded or not granted training opportunities (Cedefop, 2011). This goes along with the typical enterprises' focus on performance improvement (Cascio & Boudreau, 2010). Concerning this matter, organisations should reconsider which employees to focus on. Moreover, it would be sustainable to change perceptions and appreciate the value of performance-relevant jobs in the enterprise (Cascio & Boudreau, 2010). This refers in particular to employees50+, who are loyal to the own enterprise, and hence integrate the organisational values in a profound way as well as the connected expertise and know-how. Cascio and Boudreau (2010) report that the organisational value is positively correlated with the performance level of employees. In conclusion, it should be logic to do both fostering high-potential employees and encouraging valuable employees.

In the scope of this training, a potential source to ensure succession can be the consultance of an independent career counsellor. To stay in interaction with career counsellors and to show them transparently the company's HR needs can be a reliable source of undetected potential employees.

### Conclusion

HR1: Understand that labour market trends and forecasts are about to change profoundly and have consequences for enterprises, especially in branches with labour and skills shortages.

HR2: They are familiar with basics of the succession planning and reflect the own succession management.

Coun1: Comprehend political decisions for promotion of longer work lifes and careers as well as the goal to raise employment rates for people55+.

Coun2: See current issues of HR management and can reconstruct the need for action in





several HR areas.

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# MODULE Employer Duties 50+



### **Training Programme: InCounselling50+**

Name of Module	Workload	Trainer Guide	Workbook
2. Employer Duties 50+	120 min	p. 13	p. 19

### **Learning Objectives**

After completion of the course participants are expected to be able:

<u>Superordinate objective:</u> To conclude duties from legislation or expectations of 50+ and derive possible improvements for organisational processes, e.g. health management or recruitment processes.

### Subordinate objective:

- To explain legal aspects of further education and training (as an employer duty) to prevent older adults exclusion from learning. (TAX 2)
- To be familiar with legal aspects of employers obligations to establish a safe working environment and secure working conditions. (TAX 2)
- To introduce and reason certain helpful health management activities and other concrete methods in the company. (TAX 3)
- To know important national programs for the transition process into retirement. (TAX 1)
- To be aware of legal regulations regarding retirement and company pensions. (TAX 2)

### **Learning Content**

### Basic

- Although there is no concrete legislation for older adults, besides the retirement, some legal aspects should be known, e.g. further education and training, safe work place and environment, equal treatment
- Further education and training regulated by law
- Transition management
- Adaption of working conditions, e.g. health management
- Laws on equal treatment
- To conclude employers duties from current legislation changes





### Employees50+

- Further education and training regulated by law
- Adaption of working conditions, e.g. health management
- Laws on equal treatment

### **Employees in transition to retirement**

- Transition management
- Adaptation of working conditions, health management
- Retirement management (e.g. activities after retiring, senior experts, senior clubs, etc.)

### Jobseekers50+

Recruitment50+

### **Learning Nuggets (self-directed online course)**

- Learning Nugget 2 Recruitment50+
- Learning Nugget 3 Case Study 1 Health as a key factor for fitness





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### 1. Legal Regulations

### 1.1 Retirement Regulations Across Europe

General information about retirement in different EU Countries can be found on the EU website (Your Europe – Citizens, 2017). A condition for receiving pension from an EU country is that the retirement age was reached in that country. However, the retirement age and prerequisites differ in several EU countries. Therefore, the content needs to be adapted to the target group. On the presented website it is possible to search for information about every EU country.

All member states have in common that there is a strong public sector involvement, which provides old-age provision and typical early retirement. The role of occupational and private pension provisions differ across member states. Figure 1 shows a general classification of pension types.

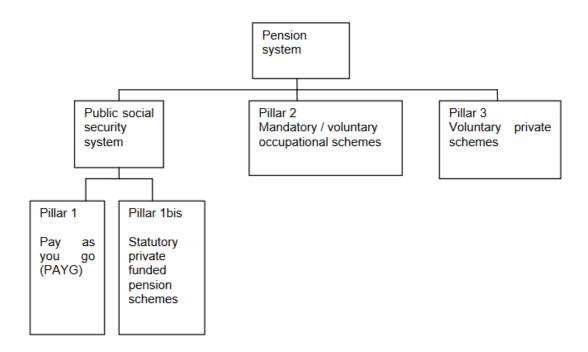


FIGURE 1 CLASSIFICATION OF PENSION TYPES (EICHHORST, GERARD, KENDZIA, NIELSEN, RÜNSTLER, & URL, P.26)

The public sector is represented in Pillar 1. PAYG Pensions refer to (tax) contributions to pension funds that are used for current pensions rather than contributions to prevent poverty in old age. Statutory private funded pension schemes are self-explaining. This has grown recently because many countries changed their social security schemes into funded schemes that are managed by private institutions. Provisions within Pillar 2 aim to provide an appropriate replacement rate, that is more advantageous "than just a poverty-preventing minimum level of living" (Eichhorst et al., 2011, p.26). They do not exist in some countries (e.g. Czech Republic, Estonia, Latvia, Lithuania and Slovakia). In other countries they only exist to a small extent (e.g.





Malta, Poland). Pillar 3 shows individual private pension schemes.

From the perspective of the citizens, the private funded pension schemes are often mandatory. This differs in some member states across generations.

In the following, retirement regulations in Germany, Poland and Croatia will be explained as examples. Trainers should consider the same aspects but additionally cover the regulations of the target country.

### 1.2 Laws on Equal Treatment

The European Union implemented four directives on equal treatment, which should be incorporated into national laws. The goal of these directives is not only to ban discrimination but also eliminate it efficiently. The four directives are described in the following:

- Council Directive 2000/43/EC focusses on the principle of equal treatment between persons no matter which racial or ethnic origin they belong to.
- Council Directive 2002/73/EC focusses on equal treatment between men and women regarding employment, training, promotion and working conditions.
- Additionally, the Council Directive 2004/113/EC focusses on the access of men and women to goods and services.
- Council Directive 2000/78/EC focusses on a general framework for equal treatment in employment and occupation. This includes to combat all kinds of discrimination on age, sexual orientation, religion or belief in employment.

For instance, in Germany those directives are incorporated in the General Act on Equal Treatment (AGG). According to the AGG, the discrimination of age needs to be prevented. This refers to the biological age and prohibits to treat older and younger people differently in a disadvantagous manner. Examples for this could be regulations concerning pay, discriminating job vacancies or regulations concerning promotion, which automatically take effect with age and discriminate against the younger people. It is important to highlight that it is more difficult to distinguish between young and old than between religions or gender. This is why the implementation and regulation is also more difficult (Guide to the General Equal Treatment Act, 2010).

### 1.3 Training Regulated By Law

### 1.3.1 On European Level

The European education policy is based on subsidies instead of laws. This includes the program Europe 2020. Part of this program is "Grundtvig" which focuses on adult learning and further training. Grundtvig has two overall goals. The first goal is to combat educational challenges with





regard to the ageing population and the second goal is to expand and deepen the knowledge and skills of adults. Grundtvig offers the opportunity to gain qualifications and, therefore, have more possibilities regarding the occupational career. The target groups are teachers, trainers or human resource staff. Grundtvig offers financial support for offering specific educational offers (EU-Info, 2017).

### 1.3.2 On National Level

This part of the training should be adapted with regard to specific national regulations.

### Germany

In Germany there is the basic right to education. This includes the claim to gain knowledge and expand qualifications, which are necessary for living in the society. This refers to a general education (Wb-Web, 2017). Further education is regulated by each federal state. In most of the federal states, employees have the right to use educational leave in order to take part in trainings. In Bavaria and Saxony there are currently no regulations for this but in every other federal state. Employees in Baden-Württemberg are guaranteed to have 5 days per year to use them for further education activities. This is regulated by the state educational law of Baden-Württemberg (Rp.baden-wuerttemberg, 2017).

### Poland

In Poland, adult education is often referred to as "Continuing Education". The Minister of National Education is responsible for co-ordinating adult education, primarily through the activities of the Department of Vocational and Continuing Education, which is responsible for many of the aspects of adult education. The Education System Act (amended version of June 2003) includes regulations about the kind of training (daily, evening, distance-learning, etc.), the new types of post-gymnasium school and about the separation of continuing education centres (CKU) and practical education centres (CKP) from schools. This enables the CKUs and CKPs to integrate actions undertaken by various continuing education institutions. Legal regulations regarding institutions of the labour market are regulated in the Act on Promotion of Employment and Institutions of the Labour Market of 20 April 2004. According to this, training institutions can offer training activities to the unemployed, which aims to focus on the promotion of unemployment. Training courses that are offered to adults by higher education institutions are included in the Act of Higher Education of 27 July 2005 (EAEA, 2011).

### Croatia

The Ministry of Science, Education and Sports changed the Adult Education Act in 2016, which included the prerequisites of the institutional and legal regulation of formal adult education. It





consists mainly of various programs of vocational education (secondary education, retraining and training programs). In contrast to formal education, non-formal adult education is not regulated by the legal framework. Those forms of learning are left to personal and subjective assessment of each individual. However, at national level there are adult programs, which have been approved by ministries, which allows licensing of acquired knowledge and skills with regard to perform certain types of work (Pavkov, 2016).

### 2. Further Education as an Employer Duty

As the legal regulations differ in European countries, the face-to-face training focusses on employer duties that include measures and instruments in addition to legal regulations.

In general, it is up to the employer to consider further development measures for its organisation. The following section will consider the relevance of further development of the staff, especially older people, with regard to demographic change. The development of individuals is the basis of organisational development because those are the people who form the organisation. From this point, it can be derived that no organisation can be effective until individuals have acquired and applied the required knowledge (Olaniyan & Ojo, 2008). However, the main objective of training and development is to increase personnel efficiency, growth and efficient operations. In order to achieve this, it is firstly important to formulate objectives for different needs and ways of achieving it. This determines the content of the training itself. One important advantage of trainings is that they can be used for solving a variety of problems that hinder productive operations. These problems can occur within different kinds of employees e.g. line and staff, unskilled, skilled, middle and upper management. A well-developed training program can support increasing productivity, improving the quality of work, developing new skills, using new tools correctly, reducing waste, implementing change and ensuring the survival and growth of the organisation (Olaniyan & Ojo, 2008). Investment in training and development can lead to an innovative climate and, therefore, to an innovative performance of the whole organisation (Olaniyan & Ojo, 2008). Further topics considering behaviour in organisations will be presented in Module 4.

It might be obvious to invest in young employees in order to ensure that they will remain in the organisation. However, there is currently little attempt to develop training programs for older people (Armstrong-Stassen & Templer, 2005). From an economic point of view, there is no incentive to invest in older people as they only have a short time left in the organisation. Hence, it would be more efficient to invest in younger employees. However, this argument becomes less important when skills obsolescence is considered. This is in particular the case if the training is conducted because of technical or organisational changes. If those changes occur more often within the organisation, the knowledge and skills of the staff becomes out-dated. Therefore, it is necessary to invest in skills and knowledge of older employees (Kistler, 2002). In addition, due to





demographic change it will not be possible for organisations to focus only on younger employees. Another advantage is that focusing on age diverse staff and teams might result in a broader range of task-relevant knowledge, skills and abilities. The organisation benefits from different experiences, opinions and viewpoints. Therefore, age diversity may improve team functioning and consequently result in better decisions and improved performance (Ellwart, Bündgens, & Rack, 2013).

As a result, it will be crucial to integrate older employees in operational processes, which means to train their qualifications (Kistler, 2002). This includes approaches to adjust training methods to the needs and learning styles of older employees (Armstrong-Stassen & Templer, 2005). Training methods for older people should focus on "hands-on" learning techniques, be self-paced and take a practical learning approach" (Amstrong-Stassen & Templer, 2005, p. 75). Improving only the access to training will have a limited effect on developing knowledge of employees, if the training itself is not tailored to the learning styles of older employees (Amstrong-Stassen & Templer, 2005). To invest in employees50+ includes not only trainings but also a health management that serves as a basis for improving further operations.

### 3. Health Management in Organisations

Apart from investing in skills and knowledge, it is essential to integrate health management strategies for employees to support physical aspects.

The demographic change and increasing complexity of work indicate the importance of the support of mental health in organisational situations. In this context, health management in organisations helps to prevent diseases. Health management describes the systematic development of organisational frameworks, structures and procedures regarding health supporting work conditions. Not only does this include rational planning and quality control but also integration of other operational processes, for instance human resource planning, communication or work place conditions. For an effective and efficient prevention, it is necessary to include environment and work place conditions. Focusing just on individual's behaviour will not be enough for long-term goals. Prevention measures should be implemented as soon as possible in order to identify and avoid diseases. When focusing on employees50+, they tend to be more successful in gaining skills and knowledge in specific areas but might have problems with body or sensory functions. They might have problems with flexibility, physical endurance or hearing and sight. In contrast to physical conditions, employees50+ have functional cognitive abilities. In this context, the focus will be on fluid and crystalline intelligence. Organisations might take advantage of the crystalline intelligence of employees50+ as this consists of general knowledge and this depends on individual life experience. However, employees50+ might have to deal with a decrease in their fluid skills. This includes information reception and processing,





combination capability and dealing with new situations. Due to demographic change, it will not be possible to focus on the strategy to replace older employees with younger ones. Therefore, health management in organisations will help to deal with the changing society and changing needs of its staff (Esslinger, Emmert & Schöffksi, 2010).

#### 3.1 Awareness for Health

By evaluating the health of employees50+, it is important to consider the individual perception of health. Nowadays, people are more willing to adopt to the sick role than they were in the 1950s (Verbrugge, 1984). The public is more empathic and flexible towards diseases, as well as employers (Verbrugge, 1984). Nevertheless, it is important to examine whether employees50+ consider themselves as healthy as they actually are. The objective health state of a persons may get worse but still this person might perceive its own health as good (Böhm, Clemes, & Ziese, 2009). This means that the objective and subjective health state of older people will differentiate from each other more than for younger people. For this reason, subjective perceived health should be considered as an important additional information about the health state of a person (Böhm et al., 2009). In this context, the question arises whether the perceived health state of a person changes over time and which aspects influence this perception. With increasing age, people tend to rate themselves more negatively in comparison to younger people. However, in comparison to people with the same age they tend to rate themselves more positively. In general, one can say that the correlation between perceived health and objective health decreases with advanced age (Kühn & Porst, 1999). A reason for the differences between younger and older people regarding their perceived health can be that older people use different criteria for evaluating themselves than younger people do. Older people focus on their health by considering physical problems and diseases. Further, as said before, they tend to compare their health state with others (Böhm, Clemes, & Ziese, 2009). With the focus on physical problems, there might be a danger of the ignorance of mental diseases. Many of today's older people grew up during a time when mental diseases were not considered as diseases but more as "weaknesses". Hence, it is important to raise awareness for mental diseases, e.g. depression, and to highlight that a good mental health is equally important to a good physical health.

#### 3.2 Methods and Instruments for Health Management

Besides concrete criteria to evaluate the employees' health in organisations, health conditions can be fostered in a preventive manner through appropriate development and work place adjustment. In this section, possible methods and instruments to prevent diseases or other health problems of the staff of an organisation will be presented.





#### 3.2.1 Methods of Personnel Development

One distinguishes between into the job, on the job, parallel to the job, near the job, off the job and out of the job methods. These different instruments will be presented to the participants in order to give them ideas of possible approaches:

- Into the job: on-boarding programmes
- On the job: return programmes after maternity/paternity leaves, reintegration management, years of travel, sophisticated tasks
- Parallel to the job: health circles (discussion with employees about health instruments)
- Near the job: appraisal interviews, coaching, mentoring
- Off the job: trainings about stress/burnout/conflicts/self-confidence, talks, family-friendly trainings
- Out of the job: outplacement, smooth transition into retirement

The instruments with a special focus on older people (e.g. smooth transition processes) will be explained in more detail in further chapters (Esslinger et al., 2010).

# 3.2.2 Soft Factors Influencing Health and Satisfaction: Personnel Care

Personnel care can be seen as an early approach of health management (Brinkmann, 1993). In this context, instruments focus on "soft factors". In addition to the above presented instruments, concrete possibilities will be presented to the participants, which serve as examples. These include, for example, a canteen with healthy food. To ensure a good quality, an employee survey could be conducted. Further activities regarding sport offers support social skills and corporate climate. Examples could be a company run, training courses, work-place gymnastics or a gym discount. In order to prevent or combat additions, possible instruments could be smoking cessation, information about therapy offers and talks for raising awareness. For the general health situation, medical check up's or flee flu vaccinations could be provided by the organisation. In addition, travel vaccinations for employees who have to travel a lot, are useful. Further non-monetary incentives could be an annual health voucher for gymnastics or yoga (Esslinger et al., 2010).

#### 3.2.3 Work Place Conditions

A work place is defined as the place where employees have to fulfil their tasks. This includes also the work equipment that is required. For the design of the work place certain regulations like work security regulations have to be considered. These depend on national requirements. However, measures that are derived from these regulations are just a basis and the minimum that has to be fulfilled. It is not enough for dealing with demographic change and an ageing population. In this context, it is necessary to create a work environment that supports the health





and performance of employees and prevents accidents at work.

This refers to ergonomics of chairs and tables, an appropriate lightning and temperature. Furthermore, trainings about ergonomic topics and how to train back, shoulder and neck could be offered by the organisation. Organisations could also use the intranet to inform about small exercises that can be done at the work place (Esslinger et al., 2010).

### 3.3 Health Management Evaluation

Apart from implementing a strategic health management in organisations, it is crucial to evaluate the conducted instruments with regard to their planned effect. It is very important to evaluate the target attainment with indicators due to limited resources in organisations (Esslinger et al., 2010). In order to evaluate health management in organisations, there are various indicators, which can be used for this. Esslinger et al. (2010) presents selected indicators for evaluating health management in organisations. Those include absenteeism accidents at work, fluctuation rate participation rate and the work ability index. All of these influence the corporate climate and will be explained in the following (Esslinger et al., 2010).

#### 3.3.1 Absenteeism

Absenteeism is one of the most used indicator for identifying work disability. Absenteeism represents a cost factor for organisations and is an indicator for dissatisfaction at work as well. In this context, it is necessary to reduce absenteeism but it is not possible to have no absenteeism at all. The focus hereby should lie on the reason for absenteeism. Absenteeism due to illness gives a hint for the general health of the organisations' staff, whereas absenteeism due to lack of motivation is a result from insufficient work conditions in general. Data of absenteeism can easily be found in the organisation itself (Esslinger et al., 2010).

#### 3.3.2 Accidents at Work

Another indicator, which directly relates to the work place itself, is the number of accidents at work. Accidents at work and resulting work disability have to be documented and reported to the responsible accident insurance. Accidents at work are lagging indicators for work disability. By conducting bench marking analyses with other companies, departments other subsidiaries can recognize deviations and derive possible strategies. However, it is still important to consider that a low rate of accidents at work and absenteeism does not mean that employees are more productive. It might be the case that employees are physical active but not performing well (Esslinger et al., 2010).





#### 3.3.3 Turnover Rate

A turnover rate within an organisation cannot be avoided. There are three different types of turnover: natural fluctuation (death, retirement), employer-induced turnover (dismissal) and dismissal by the employee. The last one is not easy to predict. The date of the dismissal can be used as an indicator in this context. A dismissal in the first twelve months could mean that recruitment or on-boarding processes were not sufficient. In contrast, a dismissal after twelve months gives a hint for employee dissatisfaction. This could be the case for people50+ who belonged to one organisation for a long time. This means employee satisfaction leads to a higher employee retention. It is not recommendable to rely just on this indicator but to compare departments or subsidiaries. In contrast to low fluctuation rates, a high fluctuation rate can also be an indicator for an ageing staff. If this is the case, new ideas should be implemented in order to keep innovativeness. Again, a fluctuation rate is also related to high costs depending on the qualification that is needed for a specific job position (Esslinger et al., 2010).

#### 3.3.4 Participation Rate

The participation rate at the different offers regarding health management is an obvious indicator for evaluation methods and instruments. The organisation can easily derive acceptance and effectiveness of their implemented measures. An easy way to analyse those rates is to use participation lists. These can consist of various items (e.g. sex, department, age) and questions about the satisfaction of employees. A high participation rate is necessary for a successful health management. It is, therefore, important to promote the offers and communicate them efficiently in order to motivate employees (Esslinger et al., 2010).

#### 3.3.5 Work Ability Index

Another option for evaluating the health management in organisations is to use the Work Ability Index (WAI), which was developed by Illmarinen and von Bonsdorff (2007). By using the WAI it is possible for organisations to examine the health of their employees at an early stage. Its validity was proven in a long-term study with a duration of eleven years. The index is based on a questionnaire that is filled out by an employee or together with a doctor. In particular, the questionnaire focusses on the topics:

- Current work ability in comparison to the best performance
- Work ability in comparison to qualification requirements
- Amount of diagnosed diseases
- Estimated impact of diseases on the work
- · Absenteeism in the last twelve months
- Self-estimation of own work ability in two years
- Mental health





The answers are rated on a scale attributing points to the work ability. Depending on the points, the employees are categorized into groups. The results can be interpreted and measures can be derived. The questionnaire can be used over different periods and, thus, effects of implemented measures can be observed. Another advantage is that the questionnaire is easy to use and it takes around 10 to 15 Minutes to answer all questions. The analysis of the data takes between 3 to 5 minutes but this also depends on the amount of questionnaires. Another important aspect is data security. The employee has to agree that the data will be used for internal analysis and might be send to supervisors or human resource managers.

The value of corporate climate represents the acceptance of employees towards health management and is a result of the above presented evaluation indicators. As a result, a healthy staff leads to a high value of corporate climate and vice versa (Esslinger et al., 2010).

Exercise: In order to ensure that all participants have knowledge about the structure and possibilities of the WAI, it is recommended to print out a questionnaire for each participant. Participants have now the opportunity to evaluate their own health by using the questionnaire. Afterwards the results, possible implications and challenges will be discussed in a plenum. Possible solutions could be:

#### Advantages:

- Easy to interpret thanks to a grid
- Easy and fast to conduct
- Includes mental health and physical health
- Can be used for individuals or groups (whole units)
- Can be used as evaluation of a specific program but also as an indicator of the health in an organisation

#### Disadvantage

- Employees might not be honest
- Very detailed, not conform with data protection laws
- Not usable for work safety
- Lack of relation to the work place
- No adaption since 1980 (was just developed for retirement purposes)
- No concrete methods
- Insufficient consideration of mental health
- Evaluation through HR might be difficult, a doctor should be contacted as well

After the pilots, the WAI was found partly useful from practitioners due to sensitive data and individual's privacy. Thus, only the first part of the WAI is introduced in the trainings. Certainly, the application and adaption of the WAI lies upon the trainer's estimation.





# 4. Transition into Retirement and Retirement Management 4.1 Transition Models

Due to increased life expectancy and the raising of retirement age in certain countries, e.g. Germany or Croatia, the age structure of the staff and careers are changing. Therefore, organisations have to find solutions for creating a smooth transition or motivate their employees to work after retirement. Different transition models will be presented to the participants and will be discussed afterwards.

Company Pension Scheme: A Company Pension Scheme is a pension that is provided by the employer. It is like receiving additional pays from the employer. This is particularly in Germany a long tradition. Still, the statuary pension is the most important source of retirement income (Deutsche Bundesbank, 2001). Depending on the implementation of company pension schemes it can lead to a longer continuance within the organisation or the opposite (Frank & Gottwald, 2012). Contributions are not liable for income tax, which is another advantage.

Partial Retirement: There are two options for implementing partial retirement. Either one can use a block model or a "real" part-time retirement. An employee who wants to use the part-time model reduces his work hours by half for the remaining time. An advantage is that the employee stays in the organisation until his or her retirement. The block models enables the employee a premature retirement. In the first part of the year, the employee works full time and in the second part he or she can go into retirement. However, there is no claim for partial retirement. It is recommendable for organisations to implement a real part-time retirement in order to benefit from the employee in his or her last year (Frank & Gottwald, 2012).

Job Sharing: At least two employees share one work place and job. This model is based on parttime work but the advantage is that the employer is more flexible. Furthermore, the short time amount reduces stress at work for the employee. In addition, it is easier for employer to find a substitute and there is more capacity when a high workload is required. A disadvantage for the employee could be a lower wage (Frank & Gottwald, 2012).

Time accounts: Time accounts offer the possibility to collect overtime hours before retirement and to compensate this time with financial incentives or a long-term paid leave.

Demographic funds: Demographic funds are a new approach for creating a smooth transition process. Demographic funds can be seen as a common pot. The employer pays in this pot and those payments are used for instruments concerning demographic change. It is advantageous that employers can use demographic funds flexible. Furthermore, they can identify staff groups, e.g. older people, who they want to support with demographic funds (Frank & Gottwald, 2012).

Another important aspect is the offer of age-friendly work places. This will be discussed in more detail in the next chapter.





### **4.2 Retirement Management**

With regard to Module 5, knowledge management is crucial for employers in order to secure skills and knowledge after retirement. Apart from employer duties during an employment and legal pension benefits, employers could still take advantage from the knowledge and skills of retired employees. During the employment, it is therefore important to create a commitment between employer and employee. In the course of the retirement period, the social world of the retiree changes profoundly. This includes a reduction in work-related activities and social activities. Apart from pension benefits, the employer can take up this problem and offer retiree clubs or similar activities after retirement. This could create a strong commitment between employer and employee. Because of this, employer can benefit from their employees after retirement and engage them as senior experts. This is an opportunity to work after retirement and individually decide on time and place structures. It is connected with low strain and responsibility. In addition, employees can work flexible and avoid physical demands (Deller & Maxin, 2009). In order to focus on long-term knowledge securement, organisations should strategically plan how and when to secure knowledge. A way to do this could be to analyse internal data considering demographic aspects and natural turnover. In this context it is possible to focus on specific groups e.g. those who will soon retire, and have a closer look on their qualifications and key knowledge. It doesn't only help to identify key knowledge but also to calculate costs that occur because of turnover. This includes direct costs (e.g. wage) but also indirect costs (e.g. quality of work and produced output). This enables an analytical and strategic approach to create a basis for knowledge securement, which will be covered in more depth in Module 5.

# Learning Nugget 2 Recruitment Process Recruitment Process

To find skilled and experienced workers is considered as a main need in many organisations under consideration of demographic change. Older people are mostly seen as a solution to this problem, still, few organisations are not aware of the potential that lies within different recruiting processes. Given the change in demographic and, thus, the shortage of experienced and skilled employees, this section focuses on the recruitment process of people50+ by considering baby boomers (individuals, born between 1946 and 1964). Doverspike et al. (2000) use "recruitment" in the broad sense of the term that includes the initial process of generating an applicant pool, the first formal contact with the applicant, the screening and the hiring process.

In order to understand the recruitment process of people50+, there are several factors, such as health and education related issues (Doverspike et al. 2000). Since these are significant predictors of the retirement age, these factors should be considered in recruitment processes. A good health status is a favourable factor for employers as well as for employees. Healthy





employees, who are given incentives, tend to be encouraged to stay or return into the work life since they tend to retire at a more advanced age compared to those who have a rather poor health status (Doverspike et al. 2000). Regarding the educational view of this topic, boomers are more educated than any previous cohort which makes them, in particular, suitable for white-collar jobs (Doverspike et al. 2000).

#### 5.2 Improving50+ Recruitment

The study of Doverspike et al. (2000) suggests that the recruitment process of people50+ exhibits differences compared to traditional recruiting processes that are designed for younger applicants. In particular, they address three segments: the nature of the work itself, the advertising materials for potential employees50+ and the recruitment interview.

**Nature of the work:** A major consideration in recruiting people50+ is to think about the work conditions that are most appealing to older people. While salary and health care related issues are important factors in attracting older people, it still may be less under control of an HR practitioner. However, flexibility and type of work can be adjusted properly. Earlier in this module, several transition models were introduced. Again, in practice the most relevant ones are blocked or part-time retirement that reduces the 40-hour to 20 or fewer hour's workweek. There are also some companies that use older workers as consultants, which is further explained in Module 5. To conclude, Doverspike et al. (2000, p.) suggest that introducing flexibility in the worked hours is a crucial factor in the success of older retirement processes, "regardless of the type of work involved or whether the company is pursuing workers internally or in the outside market.".

Advertising materials: To begin with the roots, it is of great importance to think about the advertising materials. This includes the pictures being used, the actual content of the job advertisement and the placement of the advertisement. As an example, a recruiting company pictured an older man, expressing a bored attitude next to a golf bag. The caption on the picture was a question to target group reader, if they are tired of being retired. Concerning the caption itself, phrases such as "experienced" or "mature" are recommendable since they convey the message that older employees are valued, welcomed and needed. This gives also information about how an employer should design the brand towards older applicants. Another important issue is the placement and modality of the ad. Many companies attempt to approach adults in education centres, temporary agencies, company retiree fairs, senior centres, neighbourhoods with a large percentage of older people, and even malls and libraries.

**Recruitment interview:** As a consequence of the nature of the work, the recruitment interview should be adjusted accordingly. In terms of designing an interview, companies can benefit by focusing on specific contents. According to Doverspike et al. (2000), the interview content "refers to the type of questions in the [application] process, the actual choice of the interviewer, and the description of the company given during the interview.". When HR practitioners describe the company during the first interview to the applicant, they should first point out the following





aspects of work: the flexibility of hours, scheduling freedom, social aspects, money and health benefits. As already mentioned, these are important factors attracting older workers the most.

# **End of Learning Nugget 2**

Conc		ION
Conc	aus.	ш

HR 1: Health as a critical factor for positive 50+ development and fitness.

HR 2: How to adapt recruitment processes for 50+.

Coun 1: Health as a critical factor for positive 50+ development and fitness.

Coun 2: Requirements for recruitment processes for 50+.





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# MODULE Vocational Psychology 50+



# Training Programme: InCounselling50+

Name of Module	Workload	Trainer Guide	Workbook
3. Vocational Psychology 50+	120 min	p. 24	p. 42

# **Learning Objectives**

After completion of the course participants are expected to be able:

<u>Superordinate Objective:</u> To arrange an optimal working environment for 50+ under consideration of employee behaviour, self-efficacy and self-regulation.

# Subordinate objective:

- To know different career development periods including physical and psychological ability, especially for people50+. (TAX1)
- To understand relations between personal life and career development. (TAX 2)
- To derive requirements from self-efficacy of older adults. (TAX 3)
- To activate self-regulation appropriately in transition processes. (TAX 3)
- To influence vocational behaviour of individual employees50+, employees in transition, and unemployed50+ in the work place. (TAX 4)

#### Content

#### **Basic**

- Life time and career development theory
- Self-efficacy and self-regulation theory
- Job performance and satisfaction
- Motivational preconditions, self-efficacy and self-regulation at work of people50+
- Learning preconditions of 50+

#### Employees50+

- Steps and design of skills transfer
- Employees'50+ needs
- New work requirements for people50+
- Age concept: biological, professional, subjective age





# **Employees in transition to retirement**

Self-awareness in change and transition processes

# Jobseekers50+

- Self-awareness in change and transition processes
- Self-efficacy of unemployed50+ and jobseekers50+
- Training content for jobseekers50+

# **Learning Nuggets (self-directed online course)**

- Learning Nugget 4 Career development theories
- Learning Nugget 5 Locus of control
- Learning Nugget 6 Preconditions for Learning with 50+
- Learning Nugget 7 Instrumental learning 50+
- Learning Nugget 8 Case Study 2 Age friendly onboarding





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# 1. Learning Nugget 4 Career Development Theories

In scope of various disciplines, e.g. vocational psychology, several theories have been investigated to explain career development and transition processes more precise. This is for instance the transition from school to job, between jobs and from job into retirement. An introductory summary of career development theories is explained below to give insights to the factors which impact a job and an employee.

#### a) Trait & Factor (Holland, 1997)

Main drivers for job selection, or the profession, are a person's interests. According to Holland (1997), interests are genetically established and potential characteristics that later become preferences or aversions. In the vocational context, six interest types can be determined (Holland, 1997, p 18):

Realistic - Social

- Investigative - Enterprising

Artistic - Conventional

Some interests are more similar to each other, others opposing each other. Three out of the six interests define an individual's interest characterization. Individuals and occupations can be characterized with a combination of three letters. A questionnaire of 36 items tests the degree of the six interests. The three highest interests state the interest combination of an employee or an occupation, a working environment. By comparing the individual's and the occupation's interest combination the matching quality of both can be predetermined (Holland, 1997). The higher the individual's and the working environment's profile overlap the more easily an individual is able to realize the potential in his work environment. This is because the individual can establish objectives more simply in a fitting environment, and activities are more likely to be interesting to the employee. Thus, one invests more competences and can solve tasks in a more successful way. It can be concluded that a better match between employee and occupation, results in a more satisfying work relation and career (Holland, 1997).

There are various criticisms about this theory. In the following the two main arguments are given. The theory lacks the aspect of time. There is no recognition for change, neither of the individual nor of the working environment. Furthermore, all characterizations follow stereotypes and don't consider a person's or an occupation's individuality.

However, what can be concluded from this theory is that individuality should correspond to the occupation to enable the development and an employee's fulfillment at work and thus, job satisfaction.





#### b) Life Rainbow (Super, 1980)

An overarching theory that considers work and social life, as well as different development stages in life is Super's Life-Career rainbow. It describes the labour development over an entire life span. Each person runs through five different life phases. After the growth until the age of 14, follows the "exploration" that explains the adolescence phase between 14-25 years. From age 25-45 a person establishes ("establishment") and, later, maintains what he/she has achieved ("maintenance"). After 65 years, a person experiences the "disengagement" phase. According to Super (1980), this phase is characterized by decline and withdrawal.

Each person is individual and has a personal set of aptitudes, needs, interests and values which are strengthened or weakened in different life roles. With this individual character everybody fits for several occupations. In turn, occupations are profiled with specific competences and aptitudes that are necessary for its activities and tasks. Over time, individuals, occupations, and the environment of both change. Adaptation processes take place in scope of advancing life cycles. There are maxi cycles that describe transitions from one to the next life phase, and mini cycles in mastering several tasks and challenges during one phase. The overall career success depends on the successful mastery of development tasks (vocational maturity).

Super's idea implies if the vocational identity (= objective perspective on goals, interests and talents) and vocational self-concept (= personal abilities, interests and values) match well, consequently success, satisfaction and stability result.

Super's theory influenced the counselling world profoundly and served as a base for a lot of counselling approaches. Module6 gives an overview of counselling theories and procedures as well as practices.

# c) Social Cognitive Career Theory (Krumboltz, and Lent, 2002)

Another perspective of career development represents the social cognitive career theory (Lent, Brown & Hackett, 2002). The social component describes the external impact factors of an individual's environment. The individual interacts with its environment, and vice versa. The cognitive component considers human cognitions like action processes and motivation (Stajkovic & Luthans, 2017). The theory assumes that individuals are able to self-regulate themselves to some degree when confronted with supporting or hindering environmental impacts. These new experiences provoke learning, and influence an individual's interests, goals and actions. This learning is termed social learning because external as well as internal factors affect how experiences are perceived, processed and remembered. Thus, the three main components of this theory are personal goals, outcome expectations and the beliefs about the own capabilities and competences (self-efficacy beliefs). Outcome expectations are dependent on the gained experience and the beliefs about own competences which in turn influences the goals and the action taking (Lent et al., 2002).





#### d) Four Resources Modell (Hirschi, 2012)

Another theory takes into account a person's resources covering the own environment. This model of career success covers four key resources. The sum of the four resources serves as an indicator of how one is going to settle, proceed and develop on the job or in the own career. The model's four components are (Hirschi, 2012):

- The identity resource describes how clear an individual follows the goals in the decision-making process.
- The psychological resource
   can be explained with hope which is positive related to decisiveness, management
   ability and self-efficacy.
- The human capital resource covers skills, competences and the education an individual acquired, and
- the social resource outlines social networks an individual is connected with.

The four resources are the basis for objective and subjective career success. The psychological resource, especially hope, was found to indicate the level of self-regulated career engagement. Moreover, active career management was found to be a predictor for later job satisfaction (Hirschi, 2014).

#### End of Learning Nugget 4

#### 2. Motivational preconditions, Self-Efficacy and Self-Regulation at Work

In general, development is dependent from several interacting constructs. These essential psychological constructs are motivation, self-efficacy beliefs and self-regulation. They show impacts on individuals and on job satisfaction and are crucial for this Module 3 and 4. To give a brief overview of this chapter 2: The employee's behaviour builds on the attitude of the job and on the attitude towards the organisation (Rucci, Kirn & Quinn, 1998).

Second, the employee's behaviour among others drives labour motivation, self-efficacy beliefs and finally result in job performance (Stajkovic & Luthans, 2002). It is important to point out that self-efficacy beliefs and motivation intensify each other (Bandura, 2009). The intensity level relies on the type or quality of the motivation and vice versa (Gagné & Deci, 2005).

Third, job performance and job satisfaction are dependent on each other (Judge, Thoreson, Bono & Patton, 2001). But job performance is also influenceable by external factors. Employees who are supported at work tend to involve more in their job and are, therefore, able to perform better while they suffer from less stress at work (Ford, Heinen & Langkamper, 2007). Additionally, people who perform better at work undergo a deeper job satisfaction and profit from higher psychological well-being (Bandura, 2009).





Fourth, motivation and job performance is best when employees have the right amount of autonomy and get challenging explicit goals in accordance to their competences (Bandura, 2009). For further improvement and personal development, it has been found useful to give feedback which enables employees to self-regulate their work performance (Bandura, 1991). In the following, these constructs and the interdependencies are described and explained in more detail.

# 2.1 Motivational preconditions

Motivated employees perform better on jobs than amotivated employees (Gagné & Deci, 2005). As an introduction for this section and module 4 motivation theories, this short input is provided from an individual psychological perspective. There are differences how employees get motivated. Some get active because of external incentives, for example monetary rewards. This type of motivation is called extrinsic motivation as it doesn't root in the individual him- or herself. The other type, intrinsic motivation, roots in human beings themselves, and makes them act due to personal interest, desires or values. (Stajkovic & Luthans, 2002) It is obvious that intrinsic motivation is a better incitement because it is independent from the environment and fuels itself. Likewise in jobs, employees get motivated in an intrinsic or extrinsic way. Some employees have jobs which they find interesting and, thus, care for the activities. Other employees carry out occupations they don't find interesting, but carry them out to earn money. In the latter, external incentives motivate employees.

#### 2.1.1 Corresponding Value Sets

Each individual has an own set of personal standards, on which the own actions are based (Bandura, 1991). In an organisational environment individuals are confronted with social or organisational standards one has to adapt to. As these standards are external, they represent an extrinsic motivation. However, the degree of correspondency between the employee's and organisations' standards, can motivate an employee better or worse. With regard to this, Gagné and Deci (2005) defined four different motivation types in organizational contexts.

If social and individual standards coincide largely, employees can get motivated intrinsically at work since the values and goals overlap (Gagné & Deci, 2005). Nevertheless, this is a best-case scenario and doesn't apply to all employees. Under consideration of organisational standards, there are three other extrinsic, types of motivation. The extrinsic types depend on the level of an individual's internalization of organisational standards. If an employee's own standards almost don't respond to the organisational standards, one behaves in accordance to social standards in order to feel worthy. This sort of internalization takes place at a low level and is called *introjection* (Gagné & Deci, 2005, p.334). If the employee's standards are more corresponding with the organisational standards, the *identification* with the organisation's standards is higher





and the motivation through job tasks and activities happen more easily. The most sustainable extrinsic motivation though, is the *integration* of organisational standards. It is not the same as intrinsic motivation but the standards are largely congruent, so that the employee can comprehend overall goals and remains motivated over boring tasks. This type of motivation can be explained as autonomy controlled motivation (Gagné & Deci, 2005).

# 2.1.2 Autonomy and responsibility at the workplace

For a long time frame, tangible rewards were considered highly motivating. Several studies found that tangible rewards, like extra pays or pay raise, are not sustainable and can even undermine motivation on the long run. For example Grolnick and Ryan (1987) found that monetary rewards show a short-term effect and even diminish motivation afterwards. Those external rooted rewards are often used for monotonous and repetitious work activities. However, the short-time motivating effect applies to all professions and is worsen willingness to adaptations as well as psychological well-being (Bandura, 2009). One possibility to respond sustainably to extrinsic motivation at the work place would be either a horizontal or vertical job enlargement by extending the activity field or increasing the autonomy level (Gagné & Deci, 2005).

Nevertheless, not all jobs can be adjusted towards a higher degree of autonomy. From the project's survey can be derived that it would be sufficient to grant employees acceptable responsibility. This can be achieved by integrating employees in goal setting and planning. In this way, an employee would be able to choose between various goals, to follow overall goals and to cope better with boring tasks while focusing on the overall goal. This equals an empowerment process, whereby employees, in general, should use more independently own potential resources (Herriger, 2006). To empower employees equals support through which they find useful strengths in various life roles and enhance the own development.

#### 2.1.3 Feedback

In addition, to support an employee's motivation sustainably, positive or constructive feedback can support autonomy, the acceptation of challenging goals and the evaluation of an employee's own corresponding competence. Feedback shall be given on time, continuously and in accordance with the goals (Gagné & Deci, 2005). It has to be highlighted that negative, unhelpful feedback is deconstructive and hinders motivation (Greif, 2008). Feedback is deconstructive when it is not comprehensive for the employee, e.g. when the critics are not reasonable or not related to the goals. Good feedback on the one hand appreciates the performed work, and on the other hand supports self-regulation skills. Before the concept of self-regulation is explained in detail, one has to learn about self-efficacy beliefs.





#### 2.2 Self-efficacy

Self-efficacy is explained with a person's beliefs in own abilities or competences, and describes to which extent one believes to be able to carry out certain activities and reach defined goals with own abilities. These beliefs are important as they are essential for activities' motivation and performance. If people are interested but don't consider themselves able to perform a task, they won't get active in order to avoid failure (Bandura, 2010). As soon as persons perceive themselves capable to achieve a goal they get active. Self-efficacy beliefs can be externally impacted through encouraging a person (Bandura, 2009). Encouraging is efficient, because it sets an anchor for optimism.

Continuously, encouraging influences self-efficacy beliefs, on which individual perception and processing of information depend (Stajkovic & Luthans, 2002). Moreover, helpful or constructive feedback can promote self-efficacy beliefs (Greif, 2008), as error-prone activities are analysed and potential improvements are demonstrated. Therefore, feedback always has to be adapted towards the individual. In addition, for constructive feedback it is necessary that goals are explicit and transparent from the beginning on (Bandura, 1991). This implies that employees need to know the standards of the goal measurement before they perform the task. Then, they can estimate own capabilities in accordance with the goal achievement. Goal setting is even useful when goals are clarified during activities. If an employee engages in an ongoing project and goals are set spontaneously, motivation is leveraged anyways (Bandura & Cervone, 1983). However, motivation is more sustainable and useful with prior goal clarification.

#### 2.2.1 Learning Nugget 5 Locus of Control

People with an internal locus of control believe to be able to influence their surroundings (Stajkovic & Luthans, 2002). This usually goes along with high or moderate self-efficacy. These individuals consider effort as a medium to achieve goals successfully. In other words, they estimate their actions as controllable to some degree and think they can contribute actively to the outcome with their competences. Beliefs over active contribution and outcome control are reasons to take responsibility for own activities. If such employees don't perform a task successfully, they don't get discouraged easily (Bandura, 1991). As they usually have a high skills repertoire, they may overthink what can be improved and may perform the task differently. The higher the self-efficacy beliefs, the more committed are employees to goals (Gagné & Deci, 2005), and the harder they strive to achieve the goal. Equally, the more challenging the goals are, the harder people strive to fulfill the goals (Bandura, 1991). In this case, the achieved goals are accompanied with sustainable high-quality satisfaction (Bandura, 2009).

In contrast, external locus of control often goes along with low self-efficacy beliefs. These individuals consider actions and followings outside of their sphere of influence (Stajkovic &





Luthans, 2002). They think that success is based on chance and, therefore, happens accidentally. Such employees prefer low error-prone activities, because these activities are most likely successful. Since they don't consider themselves capable to contribute actively and successfully to goal achievement, they behave rather passively and reactive. This is also the reason why they feel threatened by evaluation (Bandura, 1991). Evaluation would mean that they are confronted with mistakes and potentials, which they cannot influence or correct.

At this point, the similarity between autonomy and locus of control has to be highlighted. If people are not granted autonomy, they consider their locus of control externally. Then, if they don't achieve the outcome or the goal, they cannot be made responsible for the failure. To grant employees autonomy means that they have some degree of freedom. They can adapt solution processes and performance in a self-regulated manner and, then, the achievement depends partly on an employee's decision. Therefore, he or she takes responsibility. Hence, autonomy and an appropriate complexity level motivate and drive employees.

# End of Learning Nugget 5

#### 2.2.2 Skill Transfer to Foster Self-efficacy on the Job

Self-efficacy beliefs are crucial for human beings since they serve as a reliable predictor for self-guided educational preparation, career choice and vocational development (Bandura, 2009; Hirschi, 2014). At the same time, self-efficacy is related negatively with anxiety and depressions. The more prone a person is to anxiety and pessimistic thoughts the lower are one's efficacy beliefs and vice versa.

Organisations can respond to self-efficacy in a continuous increase of task complexity and an optimal support for skill transfer (Bandura, 2009). The three suggested steps are "enable the modeling", "guided skill perfection", and "cognitive modeling" (Bandura, 2009). It is clear, that increasing complexity is not applicable to all professions and jobs. Regardless, there are learning or training possibilities that can enrich any employee's work place and set new goals.

The "enablement through guided mastery" (Bandura, 2009, p.186) happens in the three steps mentioned above. First, to enable modeling means to divide an entire situation into its single skills, which the learner acquires one after another. Afterwards, all subskills can be joint to master the overall situation. By teaching single skills, detailed rules and techniques can be deepened and, in this way, better acquired. If a person isn't experienced in the profession or job at all, it is necessary to assist the new employee with vicarious learning. Bandura (2009, p.187) states: "Learners adopt modeled ways more readily if they see individuals similar to themselves solve problems successfully [...]". This shows, the information is evaluated as more reliable and more likely adopted from another comparable individual. In addition to that, self-efficacy enables imagination and the transfer into practice which should be taken into account during the modeling (Bandura, 2009).





To carry out learned skills is one sort of externalizing the acquired theory. Externalization promotes learners to process the skills on a different cognitive level. Performing learned skills in a specific activity turns them into competences (Kaufhold, 2006). To allow a "guided skill perfection" (Bandura, 2009, p.187) the supervisor or trainer should ensure an appropriate learning environment. An appropriate learning environment means that a trainer cannot directly influence a learner's acquisition process but can optimize learning conditions. For example, it is necessary to select tasks with a gradually increasing complexity and autonomy, to avoid overand underload. As well, constructive feedback can be part of a learning environment. It reveals gaps and serves as a potential improvement analysis for the employee (Bandura, 2009).

### 2.2.3 Coping Strategies

The provision of an optimal learning environment, guarantees new employees' skills transfer into practice and successful mastery of growing complex situations. By achieving positive outcomes, self-efficacy is strengthened and competences are more likely to be reused. Raising gradually the complexity of transfer tasks, helps learners to establish coping strategies step-by-step. Thus, they are better prepared for real-life complicated situations. When confronted with difficulties or even fears, one must be aware of how to overcome them. To manage this, coping strategies can help to keep on carrying out the proficient competences. (Bandura, 2009)

An example for a coping strategy can be "cognitive mastery modeling". The individual externalizes the imagination of mastering a certain situation and how to cope with certain difficulties. In regard, the better the self-efficacy beliefs are, the easier complex skills can be acquired (Bandura, 2009). Additionally, higher self-efficacy beliefs facilitate the modeling and make it simpler to guide. Again, therefore, the complexity and autonomy of the given task should be appropriate. Higher self-efficacy beliefs allow higher tasks' complexity and more autonomy. If the individual is experienced, prior skills transfers can be analysed. If not, similar individuals' skills transfer of comparable situations can serve as a model (Greif, 2008).

# 2.3 Self-Regulation

Self-regulation refers to the ability to "organize autonomously specific actions" (Greif, 2008, p.33).

Traditionally, self-regulation is described through negative deviation between the current status and a goal. For instance the TOTE model (Miller, Galanter & Pribram, 1960) describes an operation of test-operate-test-exit. The active person compares the current situation with the outcome-defined situation. Through the deviation, the person gets active and orients the own actions towards the outcome. During the task, a person stops to compare the current status to the target-status. The task is finished when the target-status is achieved. (Miller et al., 1960)

Regardless of achieving goals through deviation analysis, the TOTE model doesn't regard





proactive people or tasks with an open goal. Employees with a high degree of autonomy usually take a proactive part in the work environment and sometimes act without receiving a concrete goal. As they reflect actions and behaviours independently, they can e.g. react faster on necessary adaptations and errors (Bandura & Cervone, 1983). In general, this flexibility is beneficial for the organisation as autonomy goes along with responsibility which is coherent to an enterprise's values.

#### 2.3.1 Social Comparison

Self-regulation in organisations are regularly conducted via performance measurements. However performance measurements are social comparisons with other colleagues and represent one type of performance-regulation in organisations. As well here, feedback can be used to facilitate self-regulation. Although it is effortful, it can set free motivation and improve performance. To guarantee a sustainable development, feedback for self-observation and self-evaluation should be accurate, frequent, prompt and consider the own observation results (Bandura, 2009). Hence, as explained previously, efficient self-regulation show positive impacts on self-efficacy beliefs (Bandura, 1991), and in turn on the perceived locus of control.

An insensitive self-observation could be a consequence of low motivation; or better said, of low intrinsic or autonomic controlled motivation. Another reason for unreactive behaviour and low motivation or pessimistic corresponding to self-efficacy beliefs could be due to a lack of work support. If an employee sees comparable colleagues surpassing him/her, it undercuts self-observation as well as work performance (Bandura, 1991). This also can be a source of anxiety or depression. Anyways, colleague comparison can also have motivating effects on job performance (Bandura, 1991).

# 2.3.2 Job Encouragement

In contrast, to encourage employees appropriately fosters job involvement and job performance which is found to lower work stress (Ford et al., 2007). Keeping in mind that job satisfaction and job performance are dependent on each other (Judge et al., 2001). Job performance is predetermined by self-efficacy, transparent goal-setting, and feedback (Bandura, 1991). Of these three, self-efficacy is the most reliable predictor for performance.

To resume, to foster self-efficacy through skill transfer guidance, constructive feedback and a reasonable degree of autonomy in challenging tasks (including choice among others), can promote self-efficacy. This, in turn, allows implications on job performance, psychological well-being (Bandura, 1991), performance improvement and job satisfaction (Judge et al., 2001).

There can also arise dysfunctions in self-regulation, e.g. when it comes to misevaluation of a successful goal attainment. Then, employees consider their aspirations and motivation as misleading. Such misevaluation is neither satisfying nor supportive for self-efficacy beliefs





(Bandura, 1991). A biased self-regulatory perception usually roots in devaluation of own accomplishments and can lead to dissatisfaction, demotivation and even depression (Bandura, 1991). One cannot abolish an anxiety or depression by solely talking about it. It is necessary to tackle and gain mastery over pessimistic thoughts (Bandura, 2009). Coping skills and encouragement were mentioned to be useful against threats and failures (Bandura, 2009). Hence, in case of a biased self-observation or self-regulation, guidance with appropriate work support and constructive feedback are most important.

Especially insecure and unknown situations can complicate individual's evaluation. For example, transition processes to another job, into joblessness, back to work or into retirement are such unfamiliar situations. In general, all these groups require more external feedback and assistance. On the one hand, individuals need to be encouraged, as changing situations usually at one point bring up pessimistic thoughts (Kübler-Ross, 1969). On the other hand, as self-observations tend to be more difficult in unknown situations, it is helpful to support the evaluation and regulation processes of the individual (Bandura 2009). Self-observation and self-appraisal can be trained and practiced.

#### 2.3.3 Jobless' and Retirees' Self-Regulation

One target group are jobless individuals, who especially suffer from pessimistic thoughts in the long run, which consequently affects their self-efficacy beliefs. For people suffering from job loss, a training with observational learning and role playing was established. The role plays integrated the detection of obstacles, the formation of coping strategies to solve new problems, and finding alternative solutions. This training taught them how to search more effectively for jobs and to cope better with failures or backsets. (Vinokaur, van Ryn, Gramlich & Price, 1991)

Transition processes to retirement can be as diverse as individuals themselves. Some want to take advantage of free time, while others want to remain active, for example, with volunteering, returning to university or even keeping on working. However, the retirement process is strongly negatively connoted, as retirees fear to lose their vocational identity (Conn, Amundson Borgen & Butterfield, 2015), prestige and recognition, or to experience exclusion from society. Retiring employees go through a deep change in their daily life, for which they have to "assimilate to new roles" although retirement often "lack[s] other identity roles that give the worker a sense of meaning" (Conn et al., 2015, p.48). That is why modern transition models into retirement are arising and are needed. These models suggest a gradual transition or incremental reduction of working hours, to facilitate the assimilation to new work and social roles during and after retirement. Another essential aspect is the retirement age. Employees do not experience chronological ageing like babies and children. More objective for older adults would be for example the subjective age (How old does the employee feel?) (Cleveland & Hanscom, 2017). In this way, employees could individualize work or receive adequate support instead of pushing





these employees into age-related, unwilled adaptations or into retirement. Definitely, some older employees deny physical decline to avoid loss of prestige. But, this is a problem of dysfunctional thoughts, which cannot be discussed further in this scope.

Finally, it can be resumed that all of the insights and finding about human resource and employee behaviour can help companies to understand their employees better. Some enterprises carry out detailed analysis in attributing human resource data with monetary values. However, the data collection and analysis is effortful and time consuming. In this context, it has to be resumed critically that enterprises often strongly focus on performance improvement instead of a job's value (Cascio & Boudreau, 2010).

Focusing the training's overall goal, it is crucial to learn more about ageing and older adults which is content of the following section.

# 3. Conditions for an Age Friendly Work Environment

Many industrialized countries are experiencing a profound demographic change that affects the labour force potential. This situation will make it difficult to maintain the level of skills and labour force. A prolongation of work life meets changing economic conditions and a growing individuality that sets new requirements to human resource management for individuals50+ in the work place and in transition processes into retirement.

Before going into details of ageing theories, ageing effects on motivation, self-efficacy and self-regulation, as well as the concept of age has to be clarified. As mentioned before, instead of estimating an older adult's chronological age, it would rather be logic to consider the professional or subjective age (Cleveland & Hanscom, 2017). In organisational contexts this is important, because employees do not want to and should not get under- or overloaded. To give an example, an employee would feel limited, if work conditions would change by reaching a certain age, although he/she would still be able to keep on with the same activities. Considering a person old only due to the age, doesn't necessarily mean that this person was undergoing a certain decline. Especially in organisational contexts, the current growing age-diversity in staffs might make it necessary to reconsider the concept of age.

Module 4 addresses how the process of ageing and age is considered from an organisational point of view. To understand this process, the knowledge of various psychological facts can be helpful. They are explained in the following section.

# 3.1 Employee Behaviour of Adults50+

There are several ageing stereotypes that cannot be proven, but still remain vivid in organisations. Many times, adults50+ are seen as weak, fragile, tired, fatigue to change, and unable to learn new things especially when it comes to innovative technological tools and applications. These deficient models remain relevant, although active ageing models have been





proven scientifically and in practice. Consequently, older adults are often expected to not perform well anymore, and frequently are not granted further training (Cedefop, 2011). This is notably the case for older and low qualified employees who carry out monotonous and repetitious work activities (Cedefop, 2011). One characteristic of routine or monotonous work is that they are carried out autonomously in a way that cognitive structures are not activated. The disadvantage of routines is that the corresponding knowledge of facts and procedures become hard to externalize or cannot be externalized anymore (Nonaka, 1991), and equals a forgetting process (Cedefop, 2011). If one keeps in mind that learning and cognitive input can foster mental fitness, it is urgent to encourage both employees50+ and employers to (let them) participate in trainings on the job. Concrete details on how to design learning for individuals50+ is explained in section four.

Returning to age stereotypes, despite general beliefs, in the project's survey various positive stereotypes could be proven. In interviews, counsellors and HR practitioners reported that older adults are punctual, less absent than younger colleagues, highly committed to the organisation, more curious about safety (FitzGerald, Reid & O'Neill, 2017) and extremely liable and reliable towards the organisation.

Furthermore, the project's finding show that adults50+ care more about the organisational atmosphere and acknowledgement in the work place. In surveys and interviews, older adults were revealed to experience a shift from career driven to emotional driven needs. This implies that recognition, appreciation and good atmosphere gain importance in the work place for older adults. It was further detected that older employees are especially attentive when it comes to important non-core activities (Ng & Feldman, 2008). Non-core activities are necessary to maintain the performance level, contribute to work atmosphere but stick less to social roles (Ng & Feldman, 2008). This can be due to older adult's experience and need to care for the entire team. As they usually don't aspire career development, they don't consider it extremely necessary to show a good performance in front of the staff. They'd rather give precedence to younger career-driven colleagues when it comes to performance in core activities.

Ng and Feldman (2008) underpin these findings. In a meta-analysis they found no significant relationship between age and performance, in particular not for high complex tasks. This indicates that older adults do not undergo a mental decline, but only a physical decline that several studies confirm (FitzGerald et al., 2017). Anyways, it is possible to slow down physical decline for example through physical activity and workout, better nutrition and less alcohol consumption (Bryan, 2004). On organisational level these findings can be integrated in work life through promoting physical activity or offering sports courses and providing fresh fruits in a short work break. As well, work conditions and work places can be easily adapted towards an active ageing and age friendly environment. For instance with ergonomic chairs and so on. Again,





encouraging health activities and a healthy lifestyle slows down physical decline (FitzGerald et al., 2017) and fosters self-efficacy beliefs (McAuley, Lox & Duncan, 1993).

#### 3.2 Self-Efficacy of Adults50+

In general, ageing also shows an impact on building self-efficacy beliefs (Artistico, Cervone & Pezzuti, 2003). When testing driving skills, corresponding self-efficacy beliefs and avoidance behaviour, older adults were found to be poorly self-aware of their own deficits. In the rare cases of being aware of their deficits; they often showed a strong avoidance behaviour (Baldock, Mathias, McLean & Berndt, 2006). If they considered themselves as able to control actions and being able to influence the outcome successfully, they showed self-regulatory reactions, although at a very small extent (Baldock et al., 2006).

Cognitions do not decline, but change along ageing which effects self-efficacy among others (Artistico et al., 2003). For instance "cognitive control mechanisms" (Mather & Knight, 2005, p. 559) show relations to age. Testing cognitive control mechanisms among different age groups proves that older adults are more proficient in emotional intelligence and can control their moods better (Chapman & Hayslip, 2006) than younger individuals.

Changes in self-efficacy beliefs along the ageing process (Artistico et al., 2003) are also affected by social referents. Especially, when social referents are perceived as a threat to the own social status, these threatening thoughts can influence self-efficacy beliefs in a negative way (Inceoglu, Segers & Bartram, 2012). As stated above, older adults often fear not to be able to compete with younger colleagues (Ng & Feldman, 2008) in organisations. They consider their own cognitions as poorly efficient when it comes to learning in comparison with younger colleagues (Inceoglu et al., 2012). This affects their self-confidence in a negative manner and can even lead to depression, which in turn effects self-efficacy as well as performance. Independent of the reason for low self-confidence, unconfident employees require external assistance and support. Low self-confidence tend to disrupt self-efficacy because pessimistic, insecure thoughts make older adults doubt their competences and achieving their goals. In particular, these older adults struggle with new and unfamiliar situations. As suggested above, encouragement and feedback can help them to build better self-efficacy which leads to a better performance and satisfaction.

#### 3.3 Self-Regulation of Adults50+

Ng and Feldman (2008) recommend a 360-degree feedback for older adults, in which they receive feedback from superiors, colleagues and other employees. This feedback style responds to the project's findings that many adults50+ experience a biased self-perception or self-appraisal. Additionally, a guided and outcome-oriented self-reflection can help to moderate negative emotions after stressful situations. For instance, in highlighting positive aspects,





reasoning negative aspects in a structured way and resuming what can be improved the next time (Kuhl, 2001).

Ng and Feldman (2008) criticize that experiments of older workers cannot show a worse relation to the performance than experiments with younger workers. This is because poorer performers were sorted out over time. Besides, through adaptation processes, older employees tend to need less effort to achieve the same performance level (Inceoglu et al., 2012). This means, over time older adults found a job where they were most satisfied with. Opposing this argument, a survey from 2016 states that each fifth employee in Europe aged 60-years or older suffers from depression (WHO, 2016). Job satisfaction does play a role in mental health (Ford et al., 2007), as the relationship between job satisfaction and work support, and vice versa, shows. It was found that older employees see themselves less supported at work (Inceoglu et al., 2012). In conclusion, there is still a great potential to optimize the work environment for employees50+ in a satisfactory way.

#### 3.3.1 Social Comparison 50+

The project's studies found that people50+ fear being compared to younger colleagues because they perceive themselves as not competitive enough (Ng & Feldman, 2008). They believe their know-how is old and obsolete. Especially in trainings with age diverse participants, adults50+ performed worse (Ng & Feldman, 2008) and were little confident about acquiring new skills (Touron & Hertzog, 2004). In the project's interviews several interviewees stated that some adults50+ needed more encouragement to keep up with younger colleagues in trainings. But as soon as they rebuild their self-efficacy beliefs, they kept up well. Encouragement in this context serves to foster self-efficacy and to enhance job satisfaction.

#### 3.3.2 Motivation50+ for Knowledge Share

In the context of knowledge management, HR departments sometimes ask how to motivate young people to learn from older employees. It could be that this mutual learning process depends on both sides. If older employees show a passive attitude, younger colleagues are hindered to ask about experiences. Even so, it could be that the passive behaviour of older people depend on the fear not being able to compete with young colleagues (Ng & Feldman, 2008). To promote an exchange between colleagues from a psychological point of view, it can be helpful to establish an open, friendly working atmosphere. To enable this, new colleagues should be encouraged to ask employees50+. In return, employees50+ should be encouraged to see young and new colleagues as an enrichment, to whom they can show own work experiences. Additionally, this would correspond with older employees' needs of a good atmosphere and recognition (Inceoglu et al., 2012). However, in the project's surveys some reported that not every employee is able to transfer knowledge and that knowledge exchange depends on people's sympathies towards each other. More details about knowledge





management are discussed in-depth in Module 5.

#### 3.3.3 Self-Regulation50+ in Case of Vocational Transition

Furthermore, self-regulatory behaviour is necessary when it comes to change. Change can be organisational change, or a transition process to another job, into retirement or even into joblessness. Even so, older adults have difficulty in regulating their own behaviour especially in unfamiliar situations, which lies in the lacking awareness of deficits (Baldock et al., 2006) and the shifted self-efficacy (Artistico et al., 2003). On the one hand, they are not self-aware of own deficits (Baldock et al., 2006), which makes it difficult for them to estimate effort taking in unfamiliar situations. This insecurity, in turn, has a pessimistic influence on self-efficacy (Vinokaur et al., 1991), which makes it harder for them to perform and to master new situations. On the other hand, they often inherit a change fatigue behaviour. Own survey results stated that change fatigue attitudes are due to many experiences of change and a search for stability. A passive attitude towards change can also depend on deep internalized work patterns and habits. Work experiences have repeatedly proven the patterns as highly reliable over a career life. Hence, action patterns and habits are integrated more profoundly in their value set at the end of a career, and are more difficult to change.

Thus, transition into joblessness or retirement can be mentally exhausting for older employees since the change is profound and they leave behind important and daily roles, goals and values. Especially, unexpected job loss and quick retirement can be complicated to master for older individuals. This is why they need to prepare mentally for such changes as they might shift their life-roles and activities. As explained previously, the training of specific coping skills can support them to master a job loss (Vinokaur et al., 1991) or retirement more successfully.

For the investigation of the current older adult's generation it is important to consider recent literature, as other generations have gone through different socialization processes and, therefore, might differ from the current older adults' generation.

#### 3.4 Learning Nugget 6 Preconditions for Learning with 50+

# 3.4.1 General Preconditions for Learning

Following the project's learning concept, learning is understood as "[a] transformative process of taking in information that—when internalized and mixed with what we have experienced—changes what we know and builds on what we do. It's based on input, process, and reflection. "(Bingham & Conner, 2011, p. 27). In this regard, one needs to know how to plan the input, how it can be adapted and optimized for an individual.

A first step of planning the input is what the individual shall later be able to do or perform. From this, necessary learning content and knowledge is derived. Therefore, to enable an individual to use the newly acquired knowledge, he or she has to process the input cognitively in a sufficient manner. It is to say that the cognitive processing of knowledge has to refer to the action taking;





concretely to the knowledge input and the exercises. Moreover, the techniques or interventions have to be appropriate for the individual's prior knowledge and experience (Peterßen, 2004). Besides the optimal preparation, the individual needs to be interested in the topic. This can be achieved via clarifying goals, starting with a critical incident or a complex problem. Through this introduction, participants' motivation and awareness are triggered (Peterßen, 2004). For an optimal skill transfer preparation, the input is applied in an exercise or case work, as well as summarized and secured (Peterßen, 2004). After an optimal preparation, the individual is able to transfer the skills or know-how independently or with little support into practice.

To resume this, first one needs to know what an individual in the end shall be able to know or do. From this view, appropriate learning activities are derived that enhance the acquisition of knowledge or skills. In accordance with the final skills and the learning activities, the lesson is structured. It is important to adapt the content and activities to learners' prior knowledge and methodological abilities.

#### 3.4.2 Particularities of Learning50+

With a special focus on how older adults learn, the higher left pre-frontal brain activity of older people, emphasizes the following findings and suggestions. Older adults learn in a different way, which makes it harder for them to keep up in typical trainings. Due to the change in cognition (Artistico et al., 2003), learning environments for older adults should be designed in a different way: shorter input sequences with a practical focus, for instance giving real-life examples, asking for experiences, deducing theory from practice, as well as more repetitions of newly learned content. This is because they "refresh just-activated information more slowly" (Mather & Knight, 2005, p.559).

To gain older adults' motivation for training, the education should be made meaningful for them. For instance, the training should incorporate goals and outcomes that matches with their interests and desires (personal standards). Thus, the training's content is made useful not only for work life but also for social life and further activities in retirement. Redesigning trainings towards these conditions can demonstrate a form of appreciation and recognition for older adults as well, and strengthens motivation.

It shall be mentioned that cognitive activation as well supports physical and mental fitness (FitzGerald et al., 2017) and prevents forgetting and the obsolescence of knowledge. To forget knowledge or its quick obsolescence seem to be frequent in monotonous work activities. Repetitious work patterns represent a low cognitive demanding level and, over time, become a routine and in the long run equals the forgetting of know-how (Cedefop, 2011).

Besides, the orientation towards the older employee's needs, the integration in an organisational context is required as well. In general, there are six sequences to follow when trainings' content shall be transferred into practice: from a needs analysis, over goal setting, creative design,





implementation and evaluation, to the assurance of transfer into practice (Becker, 2013).

# End of Learning Nugget 6

#### 3.5 Learning Nugget 7 Instrumental learning 50+

For an easier reading, the term teacher is used for teacher, trainer, coach, mentor and so on.

Behaviour patterns and attitudes can be trained, enhanced or undermined by a teacher's, reaction. In regard, there are four different reaction types, from which especially the first two apply to older adults. This is due to persons50+ shifted intrinsic and emotional driven motivation (Inceoglu et al., 2012).

The two types that encourage behaviour are positive or negative reinforcement. The two types that hinder certain behaviour are positive or negative punishment. The experiment was first run with rats. Rats were placed in boxes with levers. Each rat got an individual box. Then, different stimuli were presented. Depending on the stimuli, a certain behaviour could have been enhanced or undermined. So-called conditioning happened, and its validity later could be proven for human beings.

In a first experiment, rats were given food as soon as they pressed the lever. Continuously, the rats pressed the lever more often (McLeod, 2007). This type of reaction is termed positive reinforcement. To encourage human beings to repeat an appreciable behaviour (Wood, Wood, & Boyd, 2005), one can praise or compliment the individual.

Other rats received an aversive stimulus. In this experiment, the aversive stimulus was a noise that appeared in the rat's box. Then, the rat had to press the lever to stop and avoid the noise. The so-called negative reinforcement can train someone to hinder or avoid a negative behaviour by responding negatively (McLeod, 2007). A person can tend to respond with a defensive behaviour (Bandura, 2009) to avoid a negative stimulus. Then, a teacher, trainer or coach should analyse the negative perceived stimulus and work out coping strategies for the individual to tackle or solve the negative stimulus. Anyways, there can be individuals who state an external locus of control or suffer from learned helplessness and need to learn that they can influence outcomes and how to cope with negative situations.

At this point, there shall be given an additional input. Situations can occur that teach employees, jobseekers or retirees not being able to control the outcomes and the goals. Thus, individuals believe they cannot master the situation with their skills. This learned helplessness can be caused by uncontrollable or perceived uncontrollable situations (Abramson, Seligman & Teasdale, 1978). Helpless persons experience a strong external locus of control, although they (from an external perspective) obviously could have had control over the situation (Stajkovic & Luthans, 2002). Thus, such persons need, or need to learn, to proceed with the offered support and master the situations. A teacher can help an individual to change the locus of control, for example through guided mastery (Bandura, 2009) or encouragement.





In the labour context, people with an external locus of control could be granted gradually more autonomy and responsibility through empowerment (Herriger, 2006) or job enlargement (Gagné & Deci, 2005). Thus, they could experience that success doesn't depend on coincidence. Of course, there are situations that remain without solutions or in which an employee, jobseeker or retiree cannot contribute fully autonomously to the solution. Then, it is a teacher's job to integrate the client into the process of change, to encourage and motivate him or her, and to highlight the benefits of investing effort and own skills. Moreover, to make a change process transparent for employees can have supportive effects on them. This can be for example, a selection of achievable goals that an employee can set individually, and complimenting certain skills and competences that are crucial for the mastery of the situation.

Back on topic conditioning: Positive punishment is one learning type that hinders behaviour. If a child behaves badly and gets spanked, the child usually won't show or will reduce the same behaviour in order to avoid further spanking. In the learning context, the teacher can put the individual right. However, this is a critical practice, as this can influence negatively the teacher-learner relationship, especially in a non-hierarchical counselling context. Under consideration of an empathic, open and genuine attitude repertoire (continuation in Module 6), he or she can express and reason his disfavour in a calm and trustworthy way. Besides, older adults are considered as an authority in many cultures, which can conflict with the described strategy. Thus, the expression of the own opinion shall be seen as a reasoned advice. So it is useful to reflect and communicate advantages and disadvantages for the learner.

Negative punishment is usually followed on negative behaviour. A kid that behaves negatively gets taken away toys. In the following, the individual will avoid the behaviour in order to prevent the withdrawal of toys (Sundel & Sundel, 2005). In the organisational context, negative behaviour can be a harmful action or bad performance. The consequences are various and can be denial of rewards, disciplinary warning or even dismissal.

In the counselling context, negative punishment is regularly applied to jobseekers. If jobseekers do not fulfil the agreed progress plan, e.g. writing applications, going to interviews, he or she is imposed sanctions on monthly pays.

These responses on behaviour can be viewed as a sort of feedback. Feedback shall be given promptly and in accordance with the individual and performance goals (Gagné & Deci, 2005), to foster an individual's reflection. It has to be emphasized that this sort of feedback can support, likewise, autonomy and the acceptation of challenging performance goals (Bandura, 2009).

#### End of Learning Nugget 7





#### Conclusion

HR 1: How to adapt motivation and promote job satisfaction for employees50+

HR 2: How to design an optimal training for people50+

Coun 1: How to support jobseekers50+ and individuals50+ in transition processes

Coun 2: How to design learning for people50+

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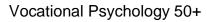




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MODULE Organisational Behaviour 50+



Training Programme: InCounselling50+

Name of Module	Workload	Trainer Guide	Workbook
4. Organisational Behaviour 50+	120 min	p. 37	p. 58

#### **Learning Objectives**

After completion of the course participants are expected to be able:

<u>Superordinate objective:</u> To derive strategies in accordance with organisational structures, performance measurement and leadership behaviour on how to integrate employees50+, employees in transition to retirement and unemployed 50+.

#### Subordinate objective:

- To know most relevant theoretic aspects of organisational culture, motivation, and leadership. (TAX 1)
- To understand ways and problems to influence organisational behaviour. (TAX 2)
- To investigate and analyse motivation and other behavioural aspects of a particular group and/or organisation. (TAX 3)
- To develop plans to integrate employees50+, employees in transition to retirement, and unemployed 50+ into organisational culture. (TAX 3)
- To develop or improve structures and instruments to motivate employees50+, employees in transition to retirement, and unemployed50+ for further work and learning. (TAX 4)

#### **Learning Content**

#### **Basic**

- Corporate culture and its influence on behaviour inside of the organisation
- Motivation (notion, importance and main theories)
- Leadership and leadership styles
- Performance evaluation and incentive systems
- Internal integration working together (employees under 50, employees50+, employees in transition to retirement)
- Generation differences as an origin for subcultures formation
- Psychological contract for employees50+ and employees in transition to retirement





# Employees50+

- Motivational factors for employees50+ and employees in transition
- Leadership style appropriate for employee50+ and employees in transition

#### **Employees in transition to retirement**

- Fair and effective performance evaluation for employees50+ and employees in transition
- Rewarding system for employees50+ and employees in transition

# **Learning Nuggets (self-directed online course)**

- Learning Nugget 9 Psychological contract
- Learning Nugget 10 Six emotional leadership styles
- Learning Nugget 11 Case Study 3 Optimal encouragement for 50+ on the workplace





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## 1. Organisational or corporate culture

Organisational or corporate culture has been in focus of many researchers, theorists and practitioners from 1980s related to different studies of organisational behaviour within large profit organisations (or corporations) as well as within small and non-profit organisations. One of the most popular authors who was researching the subject of organisational culture and put his focus to this topic during 80's and 90's was Charles Handy.

There are different definitions of organisational culture, expressing it as a complex term, although all contain common attributes such as impact on employees' motivation, satisfaction and turnover, source of competitive advantage and managerial influence on organisational culture (Kreiten and Kinicki, 2013). Generally, it can be explained that organisational culture is unique for each organisation, as same as employees' personalities, they are developing and changing simultaneously with the growth of organisation and are linked to organisational strategic values.

Organisational or corporate culture can be defined as the pattern of values, norms, beliefs, attitudes and assumptions that shape the ways in which people behave and things get done (Armstrong, 2006) or it guides behaviour of organisational members (Schermerhorn et al., 2012). An organisations' culture encapsulates what it has been good at and what has worked in the past. This provides organisations a sense of identity and determines, through the organisation's legends, rituals, beliefs, meanings, values, norms and language, the way in which 'things are done around here (O'Donnell and Boyle, 2008).

#### 1.1 Functions and types of organisational culture

Organisational culture has its own function. Schermerhorn et al. (2012) recognises two important issues: the first issue is external adaptation, meaning what has to be accomplished and how, while the second issue is internal integration, meaning how members resolve problems associated with working together. To explain external adaptation more precisely, the authors describe it as a way of reaching goals, task to be accomplished, methods used to achieve the goals and methods of coping with success and failure. Another important element of external adaptation represents the way in which employees present their organisation to the outsiders expressing their positive values and with this recommending their employer to others or not. Summing up these elements, it is clear that external adaptation deals with crucial organisational aspects such as mission, strategy and goals followed by measurement and corrections. The other function of organisational culture, internal integration, is recognised as establishment of a unique identity. Schemerhorn et al. (2012) lists the important aspect of working together, such as: deciding who is a member of the group and who is not, developing an informal understanding of acceptable and unacceptable behaviour and separating friends from enemies. These issues





of internal integration help individuals to develop a shared identity and collective commitment. Topolšek and Orhaber (2011) claim that integral integration is present (or should be present) when specialized functions or departments in a company are interdependent and when operations and procedures occur that enable and require cooperation, meaning that at least two complementary company functions operate as a unified entity.

On the other hand, Kreiten and Kinicki (2013, p. 67-68) recognise four main functions of organisational culture, as following:

- 1. Give members an organisational identity for instance valuing employee satisfaction or customer loyalty.
- 2. Facilitate collective commitment for instance employees are committed to the organisational mission.
- 3. Promote social system stability for instance work environment can be perceived as positive and reinforcing where conflict and change are effectively managed.
- 4. Shape behaviour by helping members to make sense of their surrounding it can help employees to understand why the organisation does what it does and how it intends to accomplish its long-term goals.

There are different types of organisational cultures which can be adopted within organisation. One of the most famous organisational culture typology is presented by Hardy who defines the culture as the way individuals live and follow unwritten rules and norms. Cacciattolo (2014) in a simple manner explains Handy's four types of organisational culture; power culture, role culture, task culture and person culture. Power culture refers to the culture that is spread out like a network (it is concentrated among a few, a leader or small group of individuals) from the centre to the rest of the organisation. It is often present in small entrepreneurial organisations or sports teams, where decisions are made by the leader, while rules and bureaucracies are kept to the minimum. Role culture can be found within highly defined structured organisations where power mainly derives from the personal position. These organisations typically form hierarchical bureaucracies, employees have specified delegated authorities and strict control is present. This type of culture is usually present in larger organisations. On the other hand, task control is present in organisations where individuals work as a team which is formed to solve particular problems with power deriving only from expertise and only when required. These kinds of organisations are flexible and adaptable. Finally, personal culture is quite unusual and is characteristic for the organisations in which individuals believe to be superior to the organisation they are employed in. Control systems and management hierarchies are not viable in these cultures expect my mutual approval.

However, the most widely used approach for classifying organisational culture is the competing value framework (CWF) (Übius and Alas, 2009; Hitt et al., 2011; Slocum and Hellriegel, 2011;





Kreiten and Kinicki, 2013). This classification starts from defining two main dimensions of organisational culture, whereas the first dimension (X axis) relates to the value placed on flexibility and discretion versus stability and control, while the second one (Y axis) relates to the value placed on an internal focus coupled with integration, versus and external focus coupled with differentiation in the marketplace. This framework originates four types of organisational culture and those are:

- Clan culture is recognised through its main attributes, such as: tradition, loyalty, personal commitment, extensive socialization, team-work, self-management and social influence. This type of culture is characterised by flexibility and discretion with focus inside the organisation. Effectiveness is evaluated in terms of the cohesion and morale of individuals inside the organisation. Organisation which adopts this type of culture are friendly places to work at, collaboration between employees as well as commitment, loyalty and job satisfaction are regularly present, customers are their partners, while leaders are recognised as mentors and coaches.
- Hierarchy (or bureaucratic) culture is characterised by its main attributes, such as formality, rules, standard operating procedures, hierarchical procedures and impersonality. Organisations with focus on hierarchical culture place strong value on control and stability with a focus inside the organisation. The work environment is more formalized and structured, there are extensive measurement and a variety of control mechanisms. Effectiveness is measured in terms of efficiency and orderly coordination. Tasks, responsibilities and authorities for all employees within the organisations are clearly defined. Leaders are seen as good coordinators and organizers who enforce written rules and standards.
- Adhocracy (or entrepreneurial) culture is being recognised through main characteristics: high level of risk taking, creativity, flexibility, uncertainty, ambiguity, individuality, and information-overload. This type of organisational culture has strong value placed on control and stability with a focus outside of the organisation. Effectiveness is measured in terms of creativity and innovation in the marketplace. An important challenge of these organisations is to produce innovative products and services and to adapt quickly to new opportunities. Such organisations are vibrant work places. They empower and encourage employees to take risk, to think outside the box and to experiment with new ways of getting things done. Their leaders tend to be entrepreneurial and innovative.
- Market culture focuses on the achievement of measurable and demanding goals, which are especially financially and market based goals. In addition, the focus is on suppliers, on customers, on contractors and on different external regulators. The core values of the market culture are competitiveness and productivity, as well as externally focused values and stability. Effectiveness is measured in terms of goal achievement and beating the competition





in the marketplace. These organisations can be a difficult place to work because of a constant focus on results and a recurring competition between colleagues. Customers and profit have priority over employee development and satisfaction. Employees in organisations with a market culture are expected to react fast, work hard and deliver quality work on time, while leaders tend be competitive.

#### 1.2 Internal integration - working together with 50+

According to previous theoretical aspects it can be concluded that older employees strongly emphasize internal integration respecting the fact that they are highly committed and express a great level of identity towards their organisations. This goes along with the findings in Module 3, and are now considered from an organisational point of view. Moreover, older employees definitely have certain expectations from their employers. A research provided by Lievens (Bellou, 2010) concluded that the extent to which the organisation is considered to be a respectable employer seems to be a predictor for ensuring employees' job satisfaction and, in turn, the willingness to remain in the organisation. In this way, certain elements of organisational culture have to be fulfilled within an organisation, especially in order to retain employees50+. Older employees are more likely to have already proven themselves and enjoy their job's benefits, so they do not care much for competition and changing things (Bellou, 2010). Employees50+ should be considered as a valuable resource for new employees, for instance as supporters for creating career development of younger colleagues. Older employees' knowledge, skills and experience are extremely valuable and can be beneficial for mentoring younger colleagues as they introduce youngers to entrepreneurial values. In this way, employers should take employees50+ as crucial for establishing and developing knowledge management within their organisations in the process of knowledge transfer (more in Module 5) and enhancing organisational performances.

If employers appreciate the mentoring role, they evaluate mentoring as a frequent work task and reduce some other job activities. In addition to that, employers should provide flexible work hours for older employees including the possibility of a reduced work schedule, e.g. free Friday or a short workday with e.g. 6 hours). As far as employees in transition into retirement are concerned, organisations should offer them various transition possibilities such as part-time work or job sharing. Furthermore, they should be able to choose the types of activity, the workload and the work schedule. In this way, employees in transition to retirement would remain as a valuable, important part in the organisation carrying out a meaningful job. Additionally, older employees' opinions should be appreciated by integrating them in decision-making processes to a certain extent. In this way, commitment and identity can be fortified. Finally, employees50+ will be more resistant to all types of changes within organisations, and are more prone to stability, fairness. It is important that employees50+ feel that their work field is still within their sphere of control.





In order to integrate younger employees, employees50+ and employees in transition to retirement altogether, it is important to facilitate mutual communication and to be aware of the subgroups' opinions. Younger employees (under 50) believe that their knowledge and skills - obtained during the career- will be beneficial for the organisation in future. In this way, younger employees should recognize that their own and older workers' knowledge and skills represent a contribution to the organisation as well. Additionally, research suggests "reverse mentoring". It describes younger colleagues as mentors for older employees to introduce them to information and communication technologies as well as the to the latest work place trends. This topic is further discussed in Module 5. Cross-generational mentoring can be beneficial for both younger and older employees, in a sense that work creativity is raised and a job-friendly environment is fostered. For more information about mentoring, please consider Module 7. Job-friendly work environments promote internal integration.

#### 1.3 Subcultures and generation differences

Small companies usually have a single, dominant culture, within which employees share their values, norms, believes or a set of shared actions. In contrast, large companies can contain multiple subcultures. Subcultures are based on values shared by a group rather than by an organisation as a whole (Hitt et al., 2011, p. 469). Presence of subculture can complicate the development and management of organisational culture. Subcultures are formed within organisations because their members interact more frequently with one another face to face than with other people in the organisation. Members of one unit interact more frequently than with other people in the organisation sharing a set of unique values or norms (Khatib, 1996). Strong subcultures are often found in task forces, teams and specialised project groups binding working individuals intensely together to accomplish specific task (Schemerhorn et al., 2012). In this way, an operating culture (line employees), an engineering subculture (technical and professional people) and an executive culture (top management) can be recognised (Slocum and Hellriegel, 2011). However, a subculture can be created because of some other aspects such as ethnicity, gender, race, generation, education, religion, family status or local similarities (Schemerhorn et al., 2012).

Usually there are differences within the work force, for instance among generations. Generation differences can be the reason for different subcultures within an organisation and depend on several attributes and characteristics of each generation. A generation refers to an identifiable group that shares years of birth and significant historical and social life events at critical stages of their development (Slocum and Hellriegel, 2011). In today's working world the most common generations are the Younger Baby Boomers (born 1955-1964), Generation X (born 1965-1981) and Millennials or Generation Y (born 1982-2000) (Slocum and Hellriegel, 2011; Shirilla, 2015). Each of these generations has different work habits, ethics and communication skills. Generation





Y is the first generation, which grew up with communication via e-mail, instant messaging, mobile phones or chats. This means that they do not have to deliver documents in person, which influences career paths and further career developments. Having different generations within an organisation, especially distinguishing among their use of technology, causes organisations to create and offer various trainings that bridge the generation gap. However, not only the view of technology differentiates generations within organisations, but also other aspects of organisational culture. The results of a study researched by Moss and Martins (2014) indicate that there are significant differences in the way generations view certain dimensions of organisational culture. In this sense, Generation X is characterized as more cynical than Generation Y, who are more positive, optimistic and somewhat idealistic about the working world.

In addition, some generation differences have been noticed in relation to organisational culture. Employees50+ believe in the importance of paying attention to details and the orientation towards outcomes and supportiveness (more strongly than younger employees). These findings definitely confirm the willingness and importance for employees50+ to be included in the mentoring process. Furthermore, employees50+ consider innovativeness as another crucial aspect of organisational culture. Innovativeness can be measured with a considerable level of knowledge and working experience. In contrast, aggressiveness and decisiveness are recognised as important facets of organisational culture of younger colleagues (Bellou, 2008).

# 2. Learning Nugget 9 Psychological contract

Members50+ of organisations are in charge of transmitting social skills and knowledge to younger members. These abilities are needed to make a society function effectively. This process is also known as socialization. If it is a systematic process, by which an organisation brings new employees into its culture, it is defined as organisational socialization (Slocum and Hellriegel, 2011, p. 501). During the organisational socialization process the newcomer agrees to a psychological contract with the organisation. The contract refers to a person's overall set of expectations regarding what he or she can contribute to the organisation and what the organisation will provide in return (Slocum and Hellriegel, 2011). A psychological contract is not the same as an employment contract. It does not involve the same items. A psychological contract is based upon beliefs and expectations that both parties (employee and employer) hold and, thus, is more subjective. Individuals enter an employment with a set of beliefs, expectations and obligations, expecting that those are going to be meet by the employer. For instance an employer may promise a promotion within three years after the employment to a new employee. On the other hand, the employer holds a reciprocal set of beliefs, expectations and obligations towards the employee (Robinson and Morrison, 2000). For instance loyalty, keeping





organisational secrets, etc. Nonetheless, employees often perceive that their organisation fails to fulfil that psychological contract. In most cases, it is impossible to ascertain whether a promise was actually broken (if the promotion hasn't occurred), or whether an obligation was established (Robinson and Morrison, 2000).

Expectations and beliefs of employees differ among age and generations. Employees50+ have already sustained a certain level of career development and are generally more focused on motivational needs. Employees50+ as well as employees in transition to retirement express certain financial expectations for good working conditions. For the future, their expectations represent security and stability, which can change dramatically upon retirement. Since employees50+ don't put much value on promotional opportunities, they expect financial security and recognition for their job. Both groups, employees50+ and those in transition to retirement, usually expect a good working atmosphere, positive moods and good relations among team members, respect from colleagues, especially from younger ones. An older-younger relationship can be fostered by mentoring.

#### End of Learning Nugget 9

#### 3. Motivation

Besides the motivation part of module 3 that focused on how to intrinsically and extrinsically motivate individuals in general, this section concentrates on motivation in an organizational context. This is of importance as motivation functions in a distinct manner in work places.

#### 3.1 Definition of motivation

Motivation is defined as a force within an individual that account for the direction, level, and persistence of a person's effort at work. The direction refers to an individual's choice between several possible alternatives (e.g., whether to pursue quality, quantity, or both in one's work). The level of motivation refers to the effort a person puts in (e.g., to put forth a lot or very little). The persistence describes the time how long a person sticks to the same action (e.g., to keep trying or to give up when something results difficult to attain) (Schermerhorn et al., 2012).

#### 3.2 Theories of motivation

Several theories offer explanations for motivation. Most of them can be separated into two groups: content theories and process theories.

#### 3.2.1 Content theories of motivation

Content theories are based on the premise that humans are motivated primarily by deficiencies in one or more important needs or need categories. Three important content theories are: Hierarchy of Needs Theory, Acquired Needs Theory, and Two-Factor Theory.





#### **Hierarchy of Needs Theory**

Abraham Maslow proposed one of the most popular motivation theories in the 1940s. The hierarchy of needs theory is one of the most frequently cited motivation theories. According to Maslow, people are motivated by their desire to satisfy specific needs. Maslow arranged these needs in hierarchical order. Physiological needs are located at the bottom, followed by safety needs, social and belongingness needs, esteem needs, and, at the top self-actualization needs. In general, lower-level needs must be substantially meet before higher-level needs become important (Maslow, 1965):

- 1. **Physiological needs** include basic survival needs for water, food, air, and shelter. Money is an organisational reward that is potentially related to these needs, and the extent is charged up against food and shelter.
- Safety needs include the need for protection from physical or psychological harm. People at this level might consider their jobs as security factors and as a way to keep what they have acquired.
- 3. **Social needs** involve interaction with other people and acceptance by them. These needs include the desire for affection, affiliation, friendship, and love.
- 4. Esteem needs relate to feelings of self-respect and self-worth, which also cover respect and esteem from other peers. The desire for recognition, achievement, status, and power fits in this category. Money and financial rewards may also help to satisfy esteem needs, because they provide signals of people's "worth" to the organisation.
- 5. **Self-actualization needs** represent the desire to realize personal potential, self-fulfilment, and to seek for personal growth and peak experiences.

According to Maslow's theory, each need is proponent over all higher-level needs until it has been satisfied. A proponent need is one that predominates over other needs (Hitt et al., 2011).

## **Two-Factor Theory**

The two-factor theory is based on the work of Frederick Herzberg. It has some similarities to the other need theories, but it focuses more on rewards and outcomes of performance that satisfy individuals' needs. The two-factor theory emphasizes two sets of rewards and outcomes. There are those related to job satisfaction and those related to job dissatisfaction (Herzberg, Mausner & Synderman, 1967). This theory suggests that satisfaction and dissatisfaction are not opposite ends of the same continuum but are independent from each other. In other words, the opposite of high job satisfaction is not high job dissatisfaction. It is rather low job satisfaction. Likewise, the opposite of high dissatisfaction is low dissatisfaction. It follows that the job factors for satisfaction are different from those leading to dissatisfaction, and vice versa. The factors related to job satisfaction are called satisfiers or motivators (Herzberg, Mausner & Synderman, 1967). These are factors that, when increased, will lead to greater levels of satisfaction. They include achievement, recognition, responsibility, and opportunity for advancement or promotion,





challenging work, as well as potential for personal growth. The factors related to dissatisfaction have been called dissatisfies, or hygienes (Herzberg, Mausner & Synderman, 1967). When these factors are deficient, dissatisfaction will increase. However, providing greater amounts of these factors will not lead to satisfaction, but only to less dissatisfaction. Hygiene factors include pay, technical supervision, working conditions, company policies, administration and procedures, interpersonal relationships with peers, supervisors and subordinates, status and security (Hitt et al., 2011).

#### 3.2.2 Process theories of motivation

Process theories generally focus on cognitive processes, in which people influence the direction, intensity and persistence of their behaviour. Three important process theories are: Expectancy theory, Equity theory and Goal-setting theory.

# **Expectancy Theory**

Vroom (1964) suggests in his Expectancy theory that work motivation depends on the relationships between the three expectancy factors:

- Expectancy a person's belief that working hard will result in a desired level of task performance and goal achievement (this is sometimes called effort-performance expectancy).
- **Instrumentality** a person's belief that successful performance is followed by rewards and other potential outcomes (this is sometimes called performance-outcome expectancy).
- Valence a person's value that assigns to the possible rewards and other work-related outcomes.
- In the expectancy theory, motivation (M), expectancy (E), instrumentality (I), and valence (V) are related to one another in a multiplicative fashion: M = E x I x V. Mathematically speaking, a zero at any location on the right side of the equation (that is, for E, I, or V) will result in zero motivation (Vroom, 1964). This multiplier effect has important managerial implications. The advice is to: (1) maximize expectancy, because people must believe that if they try, they can perform. (2) To maximize instrumentality, since people must perceive high instrumentality. (3) To maximize valence in order to value people's outcomes.

# **Equity Theory**

In 1963, John Stacey Adams introduced the idea that fairness and equity are key components of a motivated individual (Adams, 1963). The Equity theory is based on the idea that individuals are motivated by fairness and equity. If one identifies inequities in the input or output ratios of oneself and the referent group, the individual seeks adjusts the own input to reach the aspired equity (Adams, 1963). Adams suggested that the higher an individual's perception of equity is, the more motivated one will be and vice versa. For example if someone perceives the environment as unfair, this will result in de-motivation.





The equity comparisons are especially common when managers allocate pay raises, vacation schedules, preferred job assignments, work privileges, and office space (Adams, 1963). The equity comparisons may take place between co-workers in the group, workers elsewhere in the organisation, and even persons employed by other organisations.

An individual, who perceives unfair comparison to others, can be motivated to act in order to reduce the perceived inequity. In case of perceived negative inequity, Adams predicts that people will try to adjust their work inputs by putting less effort into their jobs; to change the rewards received by asking for better treatment; to change the comparison points to make things seem better, or to change the situation by leaving the job (Schermerhorn et al., 2012).

#### **Goal-Setting Theory**

The goal-setting theory described by Edwin Locke focuses on the motivational properties of task goals. The basic premise is that task goals can be highly motivating if they are properly set and if they are well managed. This theory states that specific and challenging goals along with appropriate feedback contribute to higher and better task performance (Locke & Latham, 1984).

The important features of the goal-setting theory are goals, which give direction to people at work. Goals clarify performance expectations in supervisory relationships, between coworkers, and across subunits in an organisation. Goals establish a frame of reference for task feedback. The willingness to work towards attainment of goals is the main source for job motivation. Clear and specific goals are greater motivating factors than general and imprecise goals. Clarity and specifity lead to greater output and better performance. Furthermore, goals should be realistic and challenging. In case of attainment, this gives the individual a feeling of pride and triumph and sets up new goal attainments. The more challenging the goal, the greater is the reward and the higher is the passion for achieving it. Appropriate feedback of results directs the employee behaviour and contributes to higher performance. The participation in goal setting makes goals more acceptable and leads to more involvement. And finally, goals also provide a foundation for behavioural self-management. (Locke & Latham, 1984)

#### 3.3 Motivation of Adults50+

In accordance with the findings and theories of Module 3, also the work motives of workers50+ fit into the explained motivation theories from the entrepreneurial view. Although there are many stereotypes about employees50+, especially in direction of their ability, performance, motivation and change acceptance, the fact is that there is an increase in the percentage of employees over 50 years in many companies. This fact demands, in the context of work motivation, that these employees should be observed equally and fair in comparison to younger employees that goes along with the equity theory of motivation.





Lord (2004) found enjoyment of work, satisfaction from using own skills, accomplishment after work performance, and the opportunity to be creative as the primary reasons for workers50+ to remain active. These findings correspond with Herzberg's two factor theory. Higgs et al. (2003) highlight that employees'50+ work because of financial reasons, of the work itself, or because of the traditional work ethic. Leviatan (1992) pointed out that workers50+ prefer jobs that satisfy higher order needs (Maslow's theory). Lord (2002) found that older engineers with insufficient income to retire, work to satisfy the first and second level needs of Maslow's hierarchy. These factors are the hygiene factors in Herzberg's two factor theory. At the same time, older engineers with sufficient income to retire are primarily motivated by needs that correspond to the third and fourth levels of Maslow's hierarchy. In Herzberg's two factor theory, these equal the motivators. Similarly, Ng and Feldman (2010) found in their meta-analysis a significant correlation between age and intrinsic work motivation, which proves Herzberg's theory and its motivators.

The goal setting theory supposes that goal specificity, goal difficulty, and goal commitment enhance task performance. It should be pointed out that workers'50+ motivation decreases when they compare their own performance with the one of younger colleagues (Warr, 2001). But their performance and their goals should be evaluated differently in comparison to younger employees. Ng and Feldman (2008) found out that older workers show high performance in organisational citizenship behaviour<sup>1</sup>. It suggests that older workers should be engaged in discretionary behaviours to compensate losses in technical core performance. People adapt to ageing by seeking to maximize social and emotional gains. Older people care more about experiencing meaningful social ties and invest more in the quality of social relationships. They experience a greater need for passing on knowledge and skills to younger workers, e.g. through training and supervising. In sum, older adults tend to prioritize emotionregulated goals. Social activities and belonging to the social environment become a greater source of satisfaction for them (Stamov-Robnagel and Biemann, 2012). To enhance work motivation among older workers, Kanfer and Ackerman (2004) proposed that performance goals for older workers could include responsibility for others, job dedication, training effectiveness, problem-solving, and project management. Specific motivators may be performance goals and rewards such as autonomy, participation in training, transfer of their competence, and taking up relevant roles in work teams (Kooij et al., 2008). And finally, regarding the expectancy theory, older employees will invest effort if they perceive that performance will be followed by satisfactory rewards. So, this theory should be observed in

Organisational citizenship behaviour is the behaviour of workers aimed at improving social interaction and mutual co-operation, which ensures smooth and effective functioning of an organisation, ultimately leading to performance improvement.





the context of motivation factors proposed by Maslow's theory and Herzberg theory, as well as propositions of the goal setting theory.

## 4. Leadership

#### 4.1 Definition of Leadership

For more than half a century, the term leadership has been a topic of discussion and research, especially in the field of management and organisational development. Most of the discussions and research focus on the issues of quality of leadership, ability of leaders, leadership effectiveness, and leadership styles. Leadership is a complex concept. Several philosophies have developed, several approaches or theories have been formed, and many models have been applied to provide meaning to the term leadership (Seethalekshmi, 2014). Therefore, there are many definitions of leadership and some of them are given below.

The Oxford English Dictionary defines leadership as the action of leading a group of people or an organisation, or the ability to do this. Daft and Marcic (2001, pp.168) stated that leadership is used to motivate employees to adopt new behaviours and, for some strategies, to infuse new values and attitudes. House et al. (2004, pp. 15) consider leadership as the ability of an individual to influence, motivate, and enable others to contribute to the own organisation's effectiveness and success. Leadership is the process of influencing others and the process of facilitating individual and collective efforts to accomplish shared objectives (Yukl, 2006). Leadership is a social influence process, in which the leader seeks the voluntary participation and effort taking of subordinates to reach organisation goals (Omolayo, 2007). Leadership is the process of inspiring others to work hard in order to accomplish important tasks (Schermerhorn, 2008).

There are four commonalities among the definitions of leadership: 1) Leadership is a process between a leader and followers, 2) leadership involves social influence, 3) leadership occurs at multiple levels in an organisation. Leadership involves mentoring, coaching, inspiring and motivating at an individual level; leaders build teams, generate cohesion and resolve conflicts at a group level. Finally leaders build culture and generate change at the organisational level. 4) Leadership focuses on goal accomplishment (Northouse, 2007, pp. 3).

#### 4.2 Leadership Styles

Leadership style is the manner and approach of providing direction, implementing plans, and motivating people. There are a number of different leadership approaches or management styles that are based on different assumptions and theories. The style that individuals use will be based on a combination of their beliefs, values and preferences. The sum of this results in the organisational culture, which is encouraged by some styles and discouraged by others. So it could be concluded that there are as many leadership styles as there are leaders. Many authors





have dealt with this issue, and classified many different leadership styles. The most common theories are presented below in chronological order.

#### Lewin's leadership style

Kurt Lewin and colleagues did leadership decision experiments in 1939 and identified three different styles of leadership, in particular when it comes to decision-making. These styles are:

**Authoritative/Autocratic** - In this leadership style, the leader makes the decisions with little or no input from the people who do the actual work.

**Democratic/Participative** - In this leadership style, the leader consults groups in order to make decisions.

**Laissez-faire/Delegative** - This style is characterized by leaders who leave most of the decision making process up to their teams with very little own input. Leaders who use this style of leadership typically take a hands-off approach.

# **The Blake Mouton Managerial Grid**

Blake and Mouton developed in the early 1960s The Managerial Grid where they tried to answer how much attention leaders pay to the employees or on the work performance. According to this model, five leadership styles are defined:

**Impoverished Management** (Low results/Low People) - The Impoverished or indifferent manager is mostly ineffective. With low regard to those who get the job done, and with little interest in creating a satisfying or motivating team environment. The results of such a management are inevitably disorganisation, dissatisfaction and disharmony.

**Produce-or-Perish Management** (High Results/Low People) - Also known as authoritarian or authority-compliance management. Such managers believe that their team members are simply a means to an end. The team's needs are always secondary to its productivity. This type of manager is autocratic, has strict work rules, policies and procedures, and can view punishment as an effective way of motivating team members. This approach can drive impressive production results at first, but low team morale and motivation as ultimate effect on work performance. This type of leader will struggle to retain high performers.

**Middle-of-the-Road management** (Medium Results/Medium People) - A Middle-of-the-Road or "status quo" manager tries to balance results and people. However, this strategy is not as effective as it may sound. Through continual compromise, this leader fails to inspire high performance and to meet people's needs fully. The result is that teams will likely deliver a mediocre performance.

**Country Club Management** (Low results/High People) – A manager with a Country Club or "accommodating" style is most concerned about team members' needs and feelings. This manager assumes that, as long as they are happy and secure, they will work hard. Results are a relaxed and fun work place, but diminishing productivity because of a lack of direction and





control.

**Team Management (High Results/High People)** – is the most effective leadership style. It reflects a leader who is passionate about the own work and who does the best for the people who work for him or her. Team or "sound" managers commit to the organisation's goals and mission. They motivate people and work hard to get people to strive for great results. But, at the same time, they are inspiring figures who look after their teams. Someone led by a Team manager feels respected and empowered and is committed achieving goals.

#### Likert's leadership styles

Likert (1967) identified four leadership styles:

**Exploitive Authoritative** - In an exploitative system, subordinates follow the decisions of their leaders with little or no input. Aversion to negative consequences and punishing measures are the main motivational factors.

**Benevolent Authoritative** - The benevolent system underlies as well the authoritarian style, but the negative factors are replaced with positive rewards as primary motivation factors. This system will typically have more communication and more teamwork than the exploitative system.

**Consultative** - This system involves a blend of Lewin's authoritarian and participative style of leadership. There is more collaboration between leaders and subordinates than in case of purely autocratic systems. Even so, collaboration is usually limited to certain areas.

**Participative** - The participative system matches with the participative climate. There is much more interaction between leaders and subordinates in this system, so communication flows freely.

#### Transactional and transformational leadership

At the end of these leadership classifications it is important to mention two important leadership styles that can be find often in management literature: transactional and transformational leadership.

Transactional leadership, also known as managerial leadership, focuses on the role of supervision, organisation, and group performance. Transactional leadership is a style in which the leader promotes compliance among followers through rewards and punishments. These leaders pay attention to followers' work in order to find faults and deviations. They are not seeking to change the future, but to merely keep things the same. This type of leadership is effective in crisis and emergency situations, as well as when projects need to be carried out in a specific fashion (Odumeru and Ifeanyi, 2013).

The concept of transformational leadership was introduced by James Macgregor Burns in 1978 in scope of his descriptive research on political leaders. Its usage has spread into organisational psychology and management with further modifications by Bass and Avalio (Odumeru and





Ifeanyi, 2013). A transformational leadership stimulates and inspires followers to achieve extraordinary outcomes (Robbins and Coulter, 2007). Transformational leadership enhances the motivation, morale, and performance of followers through a variety of mechanisms. These mechanisms include the follower's connection and identification with the same group and the project. This collective or organisational identity can be a role model for followers that inspires them and makes them interested. Followers then take greater ownership for their work, and leaders can understand better the strengths and weaknesses of the followers. In this regard, leaders can share tasks that enhance the individual follower's performance.

# 4.3 Learning Nugget 10 Six Emotional Leadership Styles

Daniel Goleman, Richard Boyatzis and Annie McKee (2004) in *Primal Leadership*, describe six styles of leading that have different effects on the emotions of the target followers:

**Visionary/Authoritative** - A visionary leadership style focuses on the vision or the organisation's needs while leaving the actual details up to the team.

**Coaching** - A leader who adopts a coaching leadership style will do best working oneon-one with employees. Leaders help them improve skills, mentor them and help them understand better the goals of the organisation, as well as how these goals relate to their own personal development desires.

**Affiliative** - Leaders who practice this leadership style focus on group dynamics. The goal is to create strong teams that work well together. This style focuses on lowering stress levels and creating good relationships between team members.

**Democratic** - Democratic leaders involve the group to take collabouratively a decision about goals and the direction. This style focuses on getting an input from everyone and a high degree of involvement.

**Pacesetting** - Pacesetting leaders focus on performance and typically set extremely high goals. This leads to an environment that is intensely focused on improvements that are defined by the leader. This type of approach can get fast results from a competent skilled team. Anyways, over time the results of using exclusively this leadership form are negative..

**Commanding/Coercive** - As the name implies this is the leadership style that is typically associated with the military. It differs from the Visionary/Authoritative style in the way of giving instructions. They tend to be much more detailed instead of just focused on the end result. This style differs from the Pacesetting style, because pacesetters are generally asking others to follow their lead and keep up, while commanding/coercive leaders are usually sending people out.

# End of Learning Nugget 10

#### 4.4 Leadership style for employees50+





Empirical studies (Davenport and Prusak, 1998) support the idea that there is no best style of leadership for employees50+. Successful leaders are expected to adapt their leadership style to different subordinates' characteristics and needs, as well as particular situations. It is known that employees with different work characteristics will be more effective and productive with different leadership styles (Tulgan, 1996). The employees' age determinates their work characteristics. So, different generations require different leadership styles, to achieve the full production potential in modern work places. Table 1 presents older employees' characteristics that should be observed in the process of choosing an appropriate leadership style (Yu & Miller, 2005):

Table 1 Work characteristics of employees50+

Work values	Work hard		
	Loyalty to employee		
	Teamwork		
	Chain of commands		
	Desire to management		
	Technical challenges		
Work attitudes	Job promotion		
	Loyalty to employer		
	Balance of work and family		
	Steadiness and rhythm		
	Formality		
	Commitment		
	Corporate paternalism		
Work expectations	Money and recognition reward		
	Job security		
	Liberal		
	Sense of entitlement		
	Highly competitive work		
	Step by step promotion		
	Authority		
	Employee		

Employees50+ have to work in all three phases of a progressive economy (industrial economy, service economy and knowledge economy) and therefore have to adapt from being predominantly industrial workers to service and knowledge workers. They are, furthermore, exposed to change to a level they have not experienced previously. They need to be integrated to the widest possible variety of training programmes as they have to learn progressively new skills. These skills are equivalent with new requisites of the economy due to economic cycle and different values (Yu and Miller, 2005). In their work life, older employees have probably





experienced many different leadership styles. According to their work characteristics, they need a leadership style that suits most their current tasks (McGregor, 1996; Yu and Miller, 2005). The elements of task orientation can be found in authoritative, democratic, produce-or-perish management, team management and transactional and transformational leadership.

# 5. Performance Evaluation and Rewarding System5.1 Performance evaluation for older employees

Today's workforce is aging. Thus, there is a higher number of employees, who remain in the workforce. Undoubtedly, the increasing number of remaining employees is important for organizations. Consequently, it is an employer's task to ensure an appropriate performance management for older workers. This involves not only performance standards, which cover discriminatory criteria, but also standards independent from stereotypes.

The evaluation of older worker's performance in comparison to younger workers can raise a human right consideration. This is because the preconditions for both worker generations are different. Furthermore, this comparative evaluation is the basis for further development or performance improvement. Due to the varying preconditions of the worker generations, the evaluation can be disadvantageous for one group, and therein unfair. An employer also has to keep in mind that performance failure of older workers demonstrate a deep cut for them and the perceived performance perception. An employer has to estimate whether it is more advantageous to adjust the performance system or whether the employee should adapt (Bird, 2014).

In order to meet adequate performance objectives, older workers should receive fair performance measurement standards in the same way as younger colleagues. Performance objectives for older employees cannot be applied always under the same circumstances (e.g. when it comes to physical work). Performance is influenced by an employee's age.

The research's results also suggest that older workers are as motivated as younger workers to contribute to the organisation's performance. Likewise, results show that older workers are more consciously engaged in performance in order to compensate losses in technical core tasks (Vasconcelos, 2015). However, older and younger workers should have the same opportunities to contribute to goal achievement. Therefore, both peers should have access to training. Other issues that can increase the productivity of older employees are the application of age-specific work places, specific jobs and aged-mixed working teams. Aged-mixed working teams are associated with significantly longer employment durations of employees50+ (Zwick et al., 2013).

Another interesting research confirms that there is no negative relationship between an employee's age and his or her performance, or related outcomes (Zwick et al., 2013). The authors also found that specific human resource measures are targeted to improve older





employees' performance and simultaneously help to retain older employees longer. This research suggests that older employees often focus on maintenance, on return from prior investment, and on prevention of losses. In contrast, younger workers primarily strive for gains in earnings, status or employment security among others.

#### 5.2 Rewarding system for employees50+

The concept of rewards is based on performance and perception. By definition, a reward is perceived as a desirable incentive by the recipient and is obtained as a consequence of an action. In order to perceive an incentive as positive, the reward must fulfil a recipient's need. As each employee has different needs, there is no general desirable reward for all employees. Thus, the elements of a behaviour-based rewarding system have to be well chosen. For example, if an employee's basic needs are security and reliable childcare or adultcare, a company's ability to provide such care is perceived as rewarding and attractive. To other employees childcare or adultcare may have no significance at all. Different employees have different intrinsic and extrinsic needs. To give another example, the needs of executives are unlikely to be similar to production workers' needs. It is important to find out key needs, because they determine the elements of a compensation plan, which in turn motivates employees to take action.

According to Maslow, the intrinsic needs for recognition, self-respect, and self-actualization are dominant over the extrinsic needs for security and physical comfort. Most people have a drive and desire that goes beyond basic compensation. Clearly, it can be generalized that intrinsic needs outweigh extrinsic need. Then, in order to design a motivating reward system, a heavy measure of intrinsic compensation should be combined with traditional measures of extrinsic compensation (McCoy, 2012).

In addition to monetary rewards, contemporary employees want and are increasingly demanding reward diversity and reward choice. In today's diverse, global economy, one measure does not fit all. Employers find that employees expect a range of various things from their work place. Employees are even willed to exchange part of their pay to get other rewards, such as psychological income, like honor and pride. Such soft incomes are especially useful, if they are derived from a meaningful job. As said above, different employees have different needs. What is even more important, individual needs change after time and require an adaption of rewards. These fluently shifting needs can put one under pressure of choice. The model for the proposed system here is the cafeteria benefits plan. Besides the regular base pay, older employees can receive incentive payments, bonuses etc. This can be further monetary rewards, pension plans, medical insurance, flexible scheduling, more vacation time and child or elder care. Here it is important that employees have the possibility of choice. This plan allows employees to tailor their





benefits to their own needs and interests taking into account their family status and private life. Equally, cafeteria compensation increases the quality and diversity of available rewards for the employee. This system can attract, motivate and retain employees. It offers quality, variety and choice (Tropman, 2001). For older employees cafeteria benefits plans should be incorporate in their rewarding system.

#### Conclusion

- HR 1: Organisational culture in the sense of integrating older employees in the workforce due to generation differences.
- HR 2: Adequate leadership styles for older employees according to their characteristics.
- Coun 1: Choosing appropriate motivation due to motivational theories and needs of older employees.
- Coun 2: Crucial rewarding elements for older employees based on their age.

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# MODULE Knowledge and Information Management



Training Programme: InCounselling50+

Name of Module		Workload	Trainer Guide	Workbook
5. Knowledge and Management	Information	120 min	p. 48	p. 79

# **Learning Objectives**

After completion of the course participants are expected to be able:

<u>Superordinate objective:</u> To apply appropriate methods for securing knowledge and providing information with the use of technology under consideration of the target groups' characteristics.

#### Subordinate objective:

- To understand knowledge management techniques to localize, acquire, capture, use, create and transfer information in the company appropriately (in accordance with the business and learning culture). (TAX 2)
- To prepare employees50+ / unemployed50+ to independently and effectively acquire, manage and share information, especially for processes at work and during job search. (TAX 3)
- To explain beneficial and obstructive criteria of proactive knowledge management and information transfer. (TAX 2)
- To valuate criteria of a good knowledge management in an ageing-friendly organisation.
   (TAX 3)
- To apply different tools in favour of effective information management and information transfer in practice. (TAX 3)
- To show older adults how to transfer information in a useful way for others' professional action and learning. (TAX 4)

# **Learning Content**

#### Basic

- Knowledge Management
- Strategies, methods and processes for securing knowledge of employees50+:
   matrixes of competence, network analysis, organisation knowledge maps
- Strategies and methods how to manage and circulate knowledge inside and outside the enterprise





- Information Management
- Information Management in the organisation, consideration of business and learning culture in managing the information
- People50+ and their use of technology
- IT didactics for older adults: provision of information for sustainable securement of knowledge
- Cognitive overload

# Employees50+

- Knowledge securing of employees50+
- Cross-generational mentorship
- Job and/or profession changes and their impact on employees50+

# **Employees in transition to retirement**

- Knowledge securing of employees50+ in transition to retirement and after retirement
- Cross-generational mentorship

#### Jobseekers50+

- Further education of unemployed regarding ICT skills
- Job and/or profession changes and their impact on jobseekers50+

# **Learning Nuggets (self-directed online course)**

- Learning Nugget 12 Strategies for information management 50+
- Learning Nugget 13 Knowledge assessment of jobseekers50+
- Learning Nugget 14 Case Study 5 Optimal Knowledge Management 50+





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# 1. Introduction: The importance of knowledge in an organisation

Knowledge is at present an important determinant of changes, which takes place on the labour market. It does not only affect the development of a definite sector, but the entire economy and, consequently, the entire society as well. Hence, the emphasis is placed on the acquisition of knowledge and, above all, on its update through participation in an organisation's continuing education or proper management. Knowledge, besides skills and competences, is a significant component of an individual's vocational functioning, as well as of his or her value as a potential employee. It has become particularly important in the knowledge society - an economy based on knowledge. The demand for highly qualified employees with a certain level of knowledge has been systematically growing. This demand concentrates, in particular, on employees, who are willed to improve their qualifications, are willed to be economically mobile, and are flexible to changes. To put it simple, knowledge management can be understood as a process, whose purpose it is to acquire knowledge and create knowledge, regardless of inside or outside an organisation. Essential from an organisation's point of view is dissemination, knowledge transfer and usage in specific activities inside the organisation. Knowledge management is associated with organisational learning, transformation of individual knowledge into collective knowledge and application to individual employees in order to increase the organisation's competitiveness (Zajac, 2014).

It has to be pointed out that the "competitive advantage of business companies is built on basis of employees' knowledge. A company with extensive knowledge, skills and competences wins the contest in a competition. Although there is a continuing dispute among theoreticians whether knowledge is property of an organisation or an employee, it certainly possesses the employee. As it is his or her everyday work expertise and it depends on him or her whether to share knowledge with other employees or not. Additionally, he or she decides whether to hand over his or her competences and skills to co-workers." (Klaus & Nowak, 2013, p. 873). However, whether an employee is willed to share knowledge among colleagues depends, largely, if they are properly motivated and encouraged to do so. Besides, the willingness of knowledge sharing depends on the organisational culture, the working atmosphere, the applied strategy for knowledge management and sufficient occasions inside the company. One can conclude that it is the activities of the HR managers and specialists who significantly affect the process of knowledge transfer among employees. The development and implementation of appropriate technologies facilitate essential knowledge management processes, for instance the acquisition, the transmission, the transfer and the search of organisational knowledge. This underlines the importance of a knowledge management strategy, with which each individual staff member's potential can be deployed in the organisation. This also includes classified knowledge.



To understand and prepare knowledge management better, one has to be aware of the knowledge type in the organisation. A division into four major categories can be found in the literature (OECD, 2000):

- know-what refers to typical formalised and codified knowledge;
- know why refers to the rights that occur in nature, organisations, human mind, or in society;
- know how refers to performance skills in definite tasks or activities. These skills mostly refer to employees' competences;
- know who indicates who is a specialist in a certain field of knowledge, the specialist's knowledge range, and competence to transfer the knowledge to subjects who need it.

To plan and implement knowledge management, it is useful the distinguish between explicit knowledge and tacit knowledge (Kowalczyk, Nogalski, 2007):

- explicit knowledge, also called formal knowledge, is a kind of formalised and codified knowledge. This kind of knowledge includes documents, databases or information that aims to improve a company's management. It is the source for a company's ideas and innovations. This kind of knowledge can be generated, collected, classified, stored with the use of databases, electronic carriers, or with the use of definite technologies.
- tacit knowledge, also called intuitive knowledge, is individual knowledge. Such individual knowledge is acquired and enhanced by personal experiences and differs from person to person. To implement such knowledge inside the organisation depends on the individual employee's willingness and the approach of knowledge management. Effective "management" of this knowledge type is only possible when knowledge is shared. Employees share knowledge when they are encouraged. Then employees can learn from one another. This is only possible when the personal approach is used.

As part of the management's follow-up, it should be pointed out that actions to locate, acquire and implement specific knowledge of employees50+ are very important. Employees50+ are competent individuals, because they have gained experiences over the professional and private lifetime. They have large deposits of explicit and tacit knowledge. Explicit knowledge describes knowledge of a company's functioning and organisational structures. Tacit knowledge covers competences, intuition and problem-solving abilities, which allow efficient performance even in difficult situations. As tacit knowledge is individual, it is of enormous value for the organisation. However, as some employees are not aware of their competences, this can be also hidden knowledge. It only can be useful, if it is codified





and shared among other employees. A precondition to knowledge share is that the employee agrees to share and use the knowledge according to the organisational objectives. Under consideration of employees50+ this is of particular importance, as they may retire in the near future. Hence, it is a company's task to take proper care of the knowledge preservation. Otherwise, it may be irretrievably lost. This relates particularly to tacit knowledge, because employees themselves may not be aware of having it. It can be natural, intuitive, or even habitual, which makes it hard to discover it. In this context, organisation's responsible for organisational culture and strategy play an important role. This is because knowledge management should be considered in an organisation's culture and strategy. It is the responsible competence to first identify and localise important knowledge that inherit one or several employees. Secondly, they help them to recognise the own potential and, then, encourage them to share the knowledge with other employees. In this way, the employee's individual resource is made accessible for the entire organisation. Moreover, it must be said that actions for employees' knowledge preservation should be regular, cyclical and continuous. Knowledge management complies with the organisation's values and strategy. The processes of knowledge management include: the localisation of internal knowledge sources; knowledge development and transfer as well as knowledge preservation (Jedrych, 2016).

## 2. Locating knowledge within an organisation

From a managerial point of view, it is crucial to identify assets of employees' knowledge within a company. The objectives for knowledge identification are (Jędrych, 2016; Zhuge 2006, pp. 571-592):

- the location of knowledge and know-how fields that are possessed by different groups of employees including employees50+;
- the determination of important and existing knowledge resources, which an organisation needs to preserve;
- the identification of knowledge gaps with respect to an organisation's needs, for which certain steps have to be determined in order to fill the gaps;
- the identification of efficient ways to transfer knowledge in the organisation.

To identify internal knowledge sources covering knowledge of employees50+, the following tools can be used (see also Jedrych, 2016):

 analyses of employees' individual skills. Such analyses can be made during periodic assessments of employees. In scope of the assessments, employees are observed during the performance of their duties, especially difficult situations that require quick





definite problem?"

decision making. In individual sessions, employees are made aware of their potential. This can also take place in an individual coaching session. In addition, employees are encouraged to self-analyse and to journalise applied strategies in concrete situations. It can be further helpful, to define what knowledge, which decision-making and what behaviour pattern was determining the success.

- a list of internal experts. This list shows where specialist knowledge is located. It can
  be made on basis of prior analysis of employee's individual skills. These analyses are
  based on managers', direct supervisors' and employees' own discussions.
   Direct questions can be for instance "who would you approach for advise in case of a
- knowledge mappings. These mappings allow the location of employees' specific skills and knowledge;
- maps of information resources. They describe the localization and the methods where
  and how to store knowledge resources. For instance, in a central database, with
  electronic media, on shared discs, on paper or in employees' heads. In this context, a
  crucial role are retired employees, who should continue to be regarded as valuable
  knowledge resources despite having left the company;
- knowledge matrixes. Intellectual assets can be arranged in the form of twodimensional matrixes. Knowledge is divided into different categories (internal knowledge, external knowledge, explicit, tacit, new, former, etc.).

The objective of the tools and methods listed above, present several possibilities to identify and localise employees' individual knowledge. However, it must be borne in mind that all organisation's competences reflect more than the sum of individual skills. An organisation's knowledge is also stored in a network represented by mutual relations. These relations exist on basis of unwritten rules and common values. Therefore, it is necessary to locate available sources of collective knowledge. For this purpose, it is possible to use the following tools (Jędrych,2016; Paliszkiewicz, 2007; Wexter 2001, pp. 249-263):

- matrixes of competence. For an organisational knowledge management it is vital to detect indispensable knowledge types and experts. They need to be supported in changes, as they play an important role in key processes. Competence matrixes allow to pinpoint definite knowledge resources, procedures, methods, and responsibilities;
- previous experience of employees and teams. This experience was acquired in the course of introducing organisational changes. This method is particularly useful in so called project studies. It helps to determine effective way of knowledge conduction and allows to learn from one's own mistakes. This is one of the effective methods that





characterises a learning organisation;

- network analysis. This method provides a possible analysis of normally hidden relations between the acquisition, the dissemination and the implementation of knowledge. The analysis allows an audit of the knowledge transfer over different organisational levels. This can also be considered as a starting point for introducing changes in this field. Restoring and mapping knowledge has a cognitive value for managers. They want to be aware of employees' cooperation and the structure of it. Network analysis allows the identification of informal employee groups, who cooperate within a knowledge field. Closely cooperating groups create so called knowledge networks. The form of a knowledge network can promote or hinder knowledge transfer processes. Certain networks can make it possible to initiate supportive actions, e.g. a community of practitioners;
- organisation knowledge maps. They are graphical illustration of mutual relations between intellectual assets, knowledge sources, their structures and applications within the company. They facilitate the systematisation of new resources and the combination of tasks with intellectual assets. They make it possible to pinpoint knowledge key resources, e.g. among individual age groups. These maps analyse the demand for certain knowledge resources and find so called knowledge gaps.

All the methods presented above should be applied to all employees, without leaving out any age group like employees50+ and retired employees.

# 3. Acquiring, creating, developing and transferring knowledge in an organisation

# 3.1 Knowledge acquisition

Knowledge acquisition and development by individual employees is possible through a number of several formal or informal methods (Klaus, Nowak, 2013, p. 875). Formal methods include amongst others: training sessions, workshops, briefing or e-learning.

Whereas, informal methods include:

- learning through experience (just as the implementation of tasks or projects);
- discussion and exchange of opinions, thematic portals (watching, analysing, sharing observations with other users);
- supervised reading;
- mentoring (developing a master apprentice relation, in which a more experienced and knowledgeable employee supports the competence development of a less experienced employee);
- coaching (guidance and aid to develop individual skills, competences and to acquire





new knowledge).

Employees50+ can or even should benefit from the above-mentioned methods. These formal and informal methods demonstrate new knowledge resources. However, employees50+ already have extensive experience and considerable organisational and practical knowledge.

# 3.2 Creation of knowledge

Acquiring new knowledge on their own, employees50+ can play a significant role in an organisation's knowledge creating processes. In this scope, they can take important functions like an in-house consultant, an expert, a benchmark prospector:

Table No. 1. The role of employees50+ in *knowledge creating processes*:

Process	Roles of	Definition		
	50+			
Creating	In-house	In a complex and changeable environment, organisations often		
knowledge	consultant	have to face unpredictable and atypical situations. In these		
		situations, the role of an adviser is most likely invaluable.		
		Internal people with extensive knowledge and experience can		
		act as in-house consultants. They can advise other employees		
		in difficult situations. This solution has many organisational,		
		economic and psychological advantages. For example, no		
		external service is use is necessary. Such services usually are		
		expensive and go along with the outflow of strategic		
		information.		
	Expert/	In a well-functioning organisation, professional knowledge and		
	Схроги			
	professional	experience are indispensable. People aged 50+ can actively		
		participate in creating knowledge, e.g. developing new		
		procedures, improving solutions.		
		In such situations, it is necessary to satisfy at least two		
		conditions:		
		- assignment of an area, in which a 50+ person will		
		specialise to become an expert.		
		- making organisational changes to allow network		
		development among individual workstations		
		establishing multi-functional relations.		
	Benchmark	Effective learning often and largely depends on finding		
		appropriate benchmarks skills, such as analysis, adaptation		



surveyor

and improvement of organisation's conditions. The implementation of those tasks require extensive knowledge and professional experience, as well as good knowledge of the business. This is particularly the case of the so called competitive benchmarking. Members of the 50+ age group are, therefore, the best candidates for benchmark surveyors / creators. First of all, the role of employees50+ in benchmarking is to: search for appropriate benchmark organisations, inside or outside the business sector. identify and diagnose concrete benchmarks in terms of effectiveness and usefulness under different conditions, transfer and adapt benchmarks to specificity and conditions of the parent organisation, improve and develop the acquired benchmarks, introduce, test and circulate the best solutions in the

- be sensitized. Despite their openness to new ideas and their extensive experiences, they might have difficulties with the implementation of the above-mentioned tasks.

Source: J.M. Lichtarski, M. Wąsowicz, E. Stańczyk-Hugiet, Raport nt. Możliwości wykorzystania nowoczesnych metod zarządzania, w tym zarządzania wiedzą w obszarze aktywizacji osób starszych, p.16 [Report on the possibility to use modern management methods, including knowledge management, in the field of activation of the elderly]

organisation,

#### 3.3 Development of knowledge

Another very important process for knowledge management, besides creating knowledge, is the knowledge development process. One of the methods for knowledge development is mutual learning. As explained above, knowledge is developed individually. Anyways, when it is combined with knowledge of other employees, it forms collective competence of an organisation. "A group of cooperating people develops group behaviour characteristics over time, which is reflected in the teamwork. On the other hand, collective knowledge stimulates development of individual knowledge, e.g. feedback" (Jędrych, 2016).

It can be concluded that each employee takes part in knowledge share processes, like organisational learning. This learning is beneficial for individual employees and build up professional and personal potential. This is why the HR manager needs to raise awareness





among own employees that cooperation is beneficial and encouraging. This also includes intergenerational cooperation.

# 3.4 Transfer and diffusion of knowledge

Other important knowledge management processes are knowledge transfer and diffusion. The purpose of transferring knowledge is to deliver it to demanding places within an organisation, where it is most wanted. It is not only about granting all employees access to all knowledge, but about selecting appropriate knowledge for certain employees. This avoids information overload or even chaos and guarantees an efficient functioning of the organisation (Jędrych, 2016). For an appropriate selection of knowledge, HR managers and specialists should monitor employees' and groups' demands for specific knowledge, and continuously should offer transfer and development opportunities. This may involve, e.g.:

- organising so called expert groups. They are convened by HR managers or specialists, and exchange subject-related opinions as well as knowledge. This is often important for the development of an organisation;
- organisation of Oxford-style debates. Purpose of such debates are a specific thesis, propositions for organisational changes, and so on;
- organisation of thematic conferences. They strive to encourage internal employees to share work-related knowledge, to describe solutions of case studies covering especially difficult professional situations;
- organisation of informal meetings. They give employees an opportunity to share their knowledge, opinion, etc.

Employees50+ can act as mentors and diffusers, which is a special role in knowledge transfer and diffusion processes (Table 2).

Table 2. Roles of employees50+ in knowledge diffusion processes:

Process	Role of	Definition			
	50+				
Knowledge	Mentor /	Knowledge dissemination within an organisation requires			
diffusion	(In-house	employees' involvement and is characterized with specific tasks.  These cover the transfer of acquired and created knowledge in a			
	(III-IIOuse				
	teacher)	Those cover the transfer of acquired and oreated knowledge in a			
		comprehensive and attractive way. The tasks refer to know			
		what, know-how and, with regard to knowledge resources, a			
		skilful (re-)formulation of lucid instructions and comments. In-			
		house teachers and mentors can perform the tasks.			





A mentor is an extensive role, because he or she transfers knowledge and improves selected skills of an apprentice. Additionally, he or she develops an apprentice's specific attitudes and self-awareness. The role of a mentor, likewise a teacher, corresponds to people's 50+ traits. Such traits are extensive professional and life experience, patience, calmness, orientation to cooperation and willingness to share knowledge. Regardless of the mutual traits, a mentor role always requires a preparation of the mentor role. This preparation covers a sensitization towards the importance of the mentor function, knowledge how to teach and design an effective learning process. It can be necessary to realize a training session in order to simulate a mentoring. In scope of this, appropriate relationships with the mentees are demonstrated and the usage of techniques and tools for mentee's development. Mentorship has a systemic and long-term approach, which implies that future possible mentors also have to be taken into account and need to be prepared. A long-term preparation is beneficial since specific characteristics, attitudes and didactic competences can be developed better. The tasks of a knowledge distributor are to gather and to systematize organisational knowledge, so that it is of later use for other employees. Employees50+ are able to assess which

Distributor

(Diffuser)

elements are vital for an organisation and how to make such elements effectively available for other employees.

Source: J.M. Lichtarski, M. Wasowicz, E. Stańczyk-Hugiet, Raport nt. Możliwości wykorzystania nowoczesnych metod zarządzania, w tym zarządzania wiedzą w obszarze aktywizacji osób starszych, p.16-17.

#### 4. Using technology to enable a sustainable knowledge securement

Employees can have access to the organisation's internal network, so called intranet. In the intranet, employees can search online information and make use of it. Companies can also use specialist programmes that store and manage knowledge. These programmes are dedicated to individual branches, for instance the expert system type. The expert system is an intelligent computer programme. It draws inferences and solves difficult problems, which would require exceptional specialists' expertise (Smok, 1994). The expert system works as





follows: the questions of users are answered by expert knowledge which was recorded from the system (Baborski, 1991). On basis of this, the system simulates actions to solve the problem, for which human intelligence would be necessary (Baborski, 1991).

There are three types of expert systems:

- advisory systems. The operations' results represent a problem-solving method. From this, advices can be concluded.
- decision-making systems without human control. Independent actions are usually impossible without human participation. Anyways, this system is an own authority and makes own decisions;
- criticizing systems. This system's task is it to assess a problem's solution. Users enter the given problem and solution into the system. Afterwards, the system analyses the solution and gives a resulting opinion.

New technologies are becoming more and more common in modern companies. Employees who want to be "up to date" must learn to integrate new technologies in daily performance. In addition, new technologies support knowledge and information management processes. Therefore, it is important that employees of all ages are able and willing to use new technologies.

# 4.1 Technology use of people50+

For young employees, new technologies are mostly natural, but in the group of employees50+ not. There are those who do not understand neither the new technologies, nor their importance and usefulness. This group of employees50+ does not treat new technologies as a facilitating work tool, but often rather as a kind of hindrance. If we take into account that new technologies are foreign to them and may cause a kind of "fear of the unknown", this attitude may be more transparent. In order to encourage employees50+ to use new technologies, first, their usefulness should be shown to them. This means, to show employees50+ how the new technologies will help them to perform their daily duties, how new technologies will relieve them at work, and how they will increase their performance. If employees50+ are convinced of new technologies' usefulness, their motivation to get to know them can be triggered.

A next step should be to teach employees50+ to use new technologies. For this, mechanisms can be established that support the acquisition of new skills and the supplement of deficits. The mechanisms can be trainings, workshops, individual work with employee, or intergenerational mentoring. The latter describes a mutual learning between a young and an old employee. Younger colleagues teach the use of new technologies, while older colleagues





introduce them to experiences and expertise skills. Such learning can be integrated in the incentive system and, thereby promote employees' motivation. In this way, special rewards can be set for employees 50+ to use new technologies. Clearly, the skills to use new technologies should be verified during a periodic assessment in advance. In addition, rewards in relation with new technologies can be granted for being active on the company's website, portal or digital platforms.

Besides motivating through incentives, it can be further useful to sensitize employees50+. This means, encouragement to be open for changes and to adjust attitudes towards new solutions and working methods. In this context, it is important to highlight benefits for them, present them examples and introduce them patiently new solutions.

# 5. How to ensure a frequent use of knowledge in the organisation

Another important aspect in the discussion of knowledge and information management is to ensure a frequent use of knowledge inside the organization. For this, it is important that the collected information and knowledge is accessible and usable for all employees. This is the basis for an effective job performance. As this represents a valuable organisational resource, key information should only be accessible for internal employees, for instance via the intranet, internal reports or internal company forums. Other internal channels for the knowledge and information provision are trainings and general or individualized group workshops.

Another way for knowledge dissemination can be organisational discussion groups, theme conferences, group works, Oxford debates, discussion cafes, and summary reports of such meetings, which are made available for all employees.

A key role can be also mentoring, coaching or tutoring. Of course, it is very important to encourage employees to use and share the knowledge resources of the company and other employees. Encouragement to share knowledge can be included in the employee evaluation system or in the incentive system. It is further important that employees view knowledge sharing processes as beneficial for themselves and to the company. In contrast, to view such processes as debilitating demonstrate a potential capital loss. In this respect, it is important to shape appropriate employee relations and to eliminate barriers for knowledge share. It is the task of HR specialists and managers to establish these employee relations.

One of the most important elements of knowledge management is its effective use. To ensure an effective use, knowledge needs to be identified, localised and stored properly. Despite this, it is necessary to demonstrate wisdom to meet fully an organisation's needs when it comes to knowledge management. It has to be emphasized that employees50+ are





often characterized with a wisdom attitude. Again, this is why employees50+ can and should be assigned with specific roles in the organisation, like the role of a human repository, a referee or juror, and a team leader (Table 3).

Table 3. Roles of employees50+ for processes of knowledge use:

Process	Roles of	Definition		
	50+			
Knowledge	Repository	A created repository of organisational know-how requires		
use		active participation of employees50+. They need to reveal		
		effectively in which areas concrete knowledge resources are		
		applied. This is a role, which is connected with a distributor		
		(diffuser). The difference between both is that the repository		
		intends to actively show the areas of available knowledge,		
		which can be used. The diffuser only deals with the		
		knowledge collection and systematization to make it available		
		for internal requests of employees.		
	Referee /	Effective use of available knowledge in an organisation		
	Juror	cannot always be observed. Employees50+ can act as a		
		referee or juror, who is able to assess the proper use of		
		earlier experiences and knowledge in the organisation. Other		
		activities of this role cover to identify areas, where employees		
		cannot use knowledge resources and experiences in a		
		satisfactory way. To treat employees'50+ experience with		
		adequate attention the approach must be chosen thoughtfully.		
		In continuation, the developed solutions take different point of		
		views into account and will affect the quality of the teamwork.		
		This can also cool down a team's enthusiasm, and this is why		
		the approach needs to be selected well.		
	Team	An employee50+ can also take the role of a team leader.		
	leader	They are usually trustworthy, well-balanced, poised persons,		
		who can handle a team's dynamics, and has well-developed		
		negotiation and conflict resolution skills. Another possible role		
		for employees50+ is the role as creator. This is a person, who		
		creates new ideas, and as an individualist is not afraid to take		
		new development paths. His decisions are based on acquired		
		knowledge and experience and are reasoned well.		



Source: J.M. Lichtarski, M. Wąsowicz, E. Stańczyk-Hugiet, Raport nt. Możliwości wykorzystania nowoczesnych metod zarządzania, w tym zarządzania wiedzą w obszarze aktywizacji osób starszych, p.17.

# 6. Preservation of knowledge in an organisation

After location, recognition and creation processes of knowledge and information resources in a company, it is important to ensure the effective protection and proper storage of them.

The preservation of knowledge should include three basic processes (Jedrych, 2016):

- selection of knowledge, which is worth preserving;
- storage of knowledge. Knowledge is stored in archives. In an organisation archives can be people, teams and computers. Whereas, the most important places to store knowledge are and will be employees. A good way is, therefore, to prepare the succession of current experts, e.g. through mentoring;
- updating data. The purpose of updating data is continuous provision and access to verified and supplemented data in the company. This represents a basis for making good decisions.

# 6.1 How to store and to secure information and knowledge?

In case of information resources that are possible to be written and be codified, the processes are rather simple. Information bases, knowledge and information repositories, information resource maps and any other tools that support new information technologies can be used. These operations work on basis of semantic networks, inference, artificial intelligence, etc.

In the context of knowledge and information securing, it is also important to prepare procedures to protect information. These include the introduction of protection procedures for classified information and professional secrecy, as well as encryption of confidential documents, etc. The introduction of protection procedures strives to prevent knowledge spillovers (knowledge transfer) that arise with patenting and licensing.

Knowledge is collected and stored mainly in the employees' minds. This is what makes the securing and storing of knowledge more difficult. Besides, it gives reason to apply a codification and personalization strategy for knowledge management. This can be e.g. a list of internal expert data covering expert competences and knowledge resources, knowledge matrixes, organisational knowledge maps, etc.

The company's goal should be to cushion negative effects of employee departures in order to





prevent the loss of organisational memory. Employees should be encouraged to exchange knowledge and learn from each other. This so called organisational learning also seeks to promote active observation of other employee's work attitudes or solutions. In this way, the employee's own potential is enriched. It can be useful to evaluate the knowledge share and learning from others e.g. during periodic employee evaluations. To reward knowledge share rewards, and hence, motivates employees to continue doing so. Thus, knowledge preservation in the company can be ensured in the long run, even after an employee's leave.

Besides proper knowledge storage and transmission, an organisation needs to ensure the preservation of organisational knowledge in order to achieve objectives of the above-mentioned processes. For this, there systematic employee interviews can be applied. In scope of the interviews, particular attention should be paid to employees, who plan to leave the company, e.g. for retirement. Possible interviews can be the exit interview, the retiring interview or the outplacement interview. During such an interview, an employee is asked e.g. to describe actions for work performance with pinpointing the knowledge sources he or she made use of, and people whom he or she cooperated with.

For an organisation's knowledge protection and preservation, it is important to secure knowledge from outgoing employees and make use from former outgoing employees, who may still represent a knowledge source for the organisation.

### 6.2 How to organize a functioning alumni community?

For an alumni community it is important to maintain proper relationships among former employees. Of course, an alumni community's success depends on the employer branding strategy. The way, how employees were treated and how they felt in the company is decisive whether they identify theirselves with the company and whether they are willed to participate in an alumni community. This is why, consequently an attractive organisational culture is crucial for the company and its cooperation.

The so-called alumni clubs is a criteria for a positive employer brand. They can be created with former employees that are possible advisors for the company. For this, it is important to maintain constant contact with former employees. This also includes access to internal portals, online forums and the Intranet for former employees. Another option would be to create a platform dedicated to former or retired employees. In this way, they remain a part of the company's community.

Retired experts can give their opinion on key issues about the company. Former employees' activities involve the company's development and should be rewarded properly. With some former employees, the company may sign cooperation agreements, or contracts for specific activities, such as consultancy or expert advice. To increase the commitment and identity





sense with the company, the company can organize regular "integration meetings" for former and current employees. A good solution may be the introduction of so called "guardian / patron / mentor system". Employees who are in transition to retirement can be mentors for the youngest employees. Retired employees can continue this "care" and cooperation with mentees. Those former employees, who have already retired and return into the company can profit from additional remuneration, medical care subsidies, etc.

# 7. Learning Nugget 12 Strategies 50+ for information management

The labour market in the entire European Union keeps evolving towards mobility, flexibility, permanent education and investment in human capital. Regarding these changes and dynamics, a contemporary employee should be characterised with the following:

- the ability and the need to perform and act in different professional situations;
- the ability to take on opportunities, implement various job roles and professional roles;
- the attitude to be mobile, flexible, organising, think entrepreneurial and creative in professional situations. The attitudes are learned from modern vocational schools;
- [...] the pursuit of becoming an entity as staff characterised by the intellectual capacity to acquire knowledge, the capability to make free choices, to take competent decisions and act responsibly (Wiatrowski 2005, p. 56).

To allow permanent education, it is desirable to provide continuous learning possibilities in the organisation. The efforts to increase employee's educational activity should include:

- creating learning conditions for people50+, e.g. the development of a self-diagnostic system of professional and general competences. It is easily available and free of charge. It can be distributed through the Internet, via career planning centres or labour exchange offices. One submits an analysis of one's own competences, which serve to determine deficits. These deficits can be made up with continuous learning, other educational adjustments e.g. individualized trainings with various modules, or professional counselling. This supports the planning of professional careers of certain occupational groups, like employees with health challenges before retirement. In this context, retraining or occupation change can be a possibility. In this scope, assistance for retraining should be offered. This assistance should also integrate future potential obstacles, and offer preventive support, e.g. principles and methods for effective job search (CV preparation, letters of application, and participation in a job interview). It is an employer's duty to protect endangered people, and reduce the risk of job loss or deactivation;
- popularisation of continuous education for people50+ through: raising awareness in government priorities and leveraging (financial) public resources for continuous education of people50+:





- increasing availability and support with public funds (Labour Fund, ESF) of continuous education of employees and jobseekers aged 45-55. In this way, qualification deficiency and mismatch do not become a reason to withdraw this group from the labour market;
- matching the training offer to the needs of people50+: creation of training programs addressed solely to people aged 50+. This education needs to take into account prior abilities and to select training topics and teaching methods, e.g. duration and length of sessions. Trainers are not only teachers, but rather contributors to the learning process. It is possible that the training can be connected with a temporary cessation of work, and with a scholarship program covering also reimbursement of expenses for the employers. This topic, training conditions for employees50+, is discussed in detail in Module 3.
- training programs for people50+ should contain a practical component, which requires the participation of employers, for instance the necessity to integrate competences for new technology. In this way, employer's participation in the training is mutually beneficial, as they learn what needs older employees have. A possibility can be to certify competences with regard to new technologies.

If an employer wants to have efficient and motivated teams, investment and attention is necessary for that:

- provide training and career development opportunities for employees50+ equally as for younger employees;
- provide continuous learning opportunities for employees50+ throughout their careers;
- match training methods with employees'50+ abilities;
- compensate potential discrimination of employees50+ in trainings and education, as long as it took place in the past;
- abolish age limit to access trainings or other learning possibilities organised by the employer;
- monitor educational progress, e.g. the participation in training sessions, and competence resource of employees;
- systematic assessment of training outcomes;
- use employees'50+ knowledge and experience when planning training sessions.

For the process of using people50+ knowledge well, the following conditions must be satisfied (Zarządzanie, 2012):

- social and cultural conditions, which depend largely on the employment of highly qualified employees, who shape the organisational culture and create favourable conditions for effective and efficient use of their qualifications;
- institutional and legal conditions, which affect individual independence of employees,





on whose knowledge creative initiatives are based. Another important role is played by teams of employers within a company;

- economic conditions, which mainly affect the financial processes of creating and using knowledge;
- technological and information conditions, which are the basis for knowledge use and information processes. Latter processes are characterised by highly advanced information technology, e.g. "hardware" elements and "software" elements. What becomes important in this reference is the use of modern technology by people50+, who need to be able to participate in processes of knowledge management.

For years, information systems have been assisting different areas of company functioning including knowledge and information management. Nowadays, the ability to use the Internet or other technical novelties is obviously part of olders<sup>2</sup> and youngers everyday life. Technology has already become a constant part of our life. Further modern economic and social development would be difficult to imagine without IT. An organisation employing employees50+ should provide related knowledge and skills, which allow:

- search for information in different textual and extra-textual sources,
- selection and gathering of information,
- analyses and interpretation of information,
- management systems to store information,
- archiving information,
- drawing up information transfer channels with the use of different media, and
- circulation of information in different sources and different forms.

# **End of Learning Nugget 12**

# 8. Learning Nugget 13 Knowledge assessment of jobseekers50+

Knowledge determines both the success of the organisation, as well as of the individuals – it constitutes a professional potential of each of us. Career counsellors who cooperate with unemployed50+ and the jobseekers50+ should make their clients aware how important knowledge is – also in the context of competent usage and presenting (e.g. in the course of conversations with employers) and how significant it is as far as the competitiveness of employees and the job seekers is concerned. A career counsellor should aspire to diagnose the resources of knowledge, ability and competence of his/her client. This may be

<sup>&</sup>lt;sup>2</sup> "Twenty-year-old and younger people of today are "the digital generations" for whom making use of digital technology is universal and natural. According to the report "World Internet Project – Poland 2010", differences in the use of the Internet by different age-groups in our country are dramatic. 95% of Polish teenagers can be found "W sieci" [In the Network], but only 39% of the people aged 50-59 and just 15% of the people aged 60+" (op.cit. Z. Płoszyński, *Internet w doradztwie zawodowym*, [The Internet in Occupational Counseling][in:] *Współczesne problemy poradnictwa zawodowego*, [Contemporary Problems of Occupational Counseling] ed. by B.J. Ertelt, W.Duda, K. Kurek, Wyd. AJD, Częstochowa 2013, p. 91





implemented by formal and structured methods, e.g. diagnostic tests, tests of knowledge, tests of competence, or aptitude tests. Less formal tools can be of help here e.g. an interview, conversation with a client during which it is possible to ask him/her about the resources of professional knowledge and self-assessment that concerns their knowledge or abilities (e.g. in the range of an active job-hunt, preparation of application documents, presenting oneself during an interview). On this base diagnosing possible gaps is possible, alongside with the indication of the areas for the individual development and the follow-up work with the client.

It is also significant to make the clients aware of the fact that the learning process is important due to the dynamically changing and requiring labour market. There exist both formal and informal methods of increasing one's knowledge. The unemployed50+ and the jobseekers should be aware how important it is to constantly be updated with novelties concerning their professions, as well as with the new trends connected with the progress that regards work organisation (e.g. using new technologies at work).

The challenge for career counsellors is to convince the unemployed50+ and the jobseekers to become open for changes, to find new alternatives, chances and opportunities e.g. in the scope of acquiring of new knowledge and abilities.

# **End of Learning Nugget 13**

#### Conclusion

HR 1: It is important to remember that each step in the process of knowledge management implementation is significant, that is the diagnosis of knowledge of both the employees and the group and organisational knowledge, establishing of getting knowledge from the outside, planning of the whole system of organisational learning, intelligent localization, acquiring, development and transfer of knowledge.

HR 2: In the proces of knowledge management it is important to take care of the atmosphere at work to make the employees eager to be ready and open to use their knowledge for the sake of the company's development, to share their knowledge with others and to support employees to participate in changes, e.g. by showing them some good aspects of such changes.

HR 3: While running training sessions for 50+ employees, it is necessary to pay attention to their knowledge, practice and experience to appreciate all the potential they already have. New knowledge can increase, boost and develop their professional resources.

Coun 1: It is necessary to make the clients aware of how important knowledge is and the appropriate use of it – from the perspective of competitiveness of employees and job seekers.

Coun 2: Diagnosis of knowledge potential, skills and competences of the client should be





prior to the proces of planning work with the client in the scope of development of their knowledge.

Coun 3: It is of great importance to make the clients aware of how significant the proces of lifelong learning is – both formal and informal.

Coun:4: The challenge for career counsellors is to convince the 50+ unemployed and the job seekers to become open for changes – to find new chances and opportunities.

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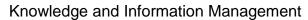




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# MODULE Introduction to Counselling 50+



# Training Programme: InCounselling50+

Name of Module	Workload	Trainer Guide	Workbook
6. Introduction to Counselling 50+	120 min	p. 69	p. 108

# **Learning Objectives**

After completion of the course participants are expected to be able:

<u>Superordinate objective:</u> To create a holistic and demand-oriented counselling process for people50+.

# Subordinate objective:

- To get to know best- and worst-practice examples as well as criteria for positive and negative impact factors on counselling processes in practice. (TAX 1)
- To explain most important counselling theories with regard to usability in practice. (TAX
   2)
- To reason crucial elements (e.g. contract negotiation) of a counselling process from a holistic point of view. (TAX 3)
- To reflect certain aspects of counselling consultations and processes. (TAX 4)
- To improve individual-oriented consultations in scope of career and transition counselling along appropriate counselling theories taking into account client's personal experiences and needs. (TAX 3)

# **Learning Content**

# **Basic**

- Definition of counselling
- Counsellor's attitudes and skills
- Counsellee's
- Basic theoretical knowledge of counselling procedures
- Reflection of counselling
- Evaluation of counselling
- Practical experience integrated in exercise and exchange

# Employees50+

Support for orientation, decision-making and problem-solving processes of employees





- Readiness for counselling
- Harmonization of employees and enterprise's goals

# **Employees in transition to retirement**

Support for transition management processes

# Jobseekers50+

- Empathy for unemployed50+
- Support for dealing with labour market requirements

# **Learning Nuggets (self-directed online course)**

- Learning Nugget 15 Selective perception
- Learning Nugget 16 Decision-making
- Learning Nugget 17 Difficulties in counselling
- Learning Nugget 18 Case Study 7 Age-friendly recruitment
- Learning Nugget 19 Case Study 9 Preretirement Process





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# 1. Counselling Basics

Although individuals are independent, they often seek for help from an external, neutral advisor. Examples for this can be the decision for the first profession or the change of a job/profession as well as transition processes into joblessness, into another employment or into retirement. There are numerous other occasions when one seeks help or advice from a counsellor. This module focuses on counselling of individuals50+ in organisational and labour market contexts. The module is placed at the very end of this handbook, so that all prior knowledge and know-how can be integrated in this module.

Current counselling theories take into account prior investigations about the employee-work relationship which were introduced in Module 3. For instance, vocational interests (Holland, 1997), the life rainbow (Super, 1980) or the social cognitive career theory (Lent, 2002). Anyways, these theories are rarely applied (Ertelt, 2017) and are only partially helpful in counselling practice (Schulz, 2014). This module follows a rather practical and methodological approach to guarantee the transferability into practice through, especially into HR and counselling areas. This is why the theoretical module follows another order than the power point slides. To understand the topic theoretically well it is easier to read first about the counsellor and the counsellee, and afterwards about the counselling process. Hoewever, in class to ensure a practical reference, another order is chosen.

#### 2. The Counsellor

In the project's learning concept we defined a counselling practitioner as someone who gives information and advice to a client under consideration of his/her individual needs. He or she supports the client in the transition process through work place changes into another job, to joblessness or to retirement and guides the client to new activities or jobs including job matching and mediation. This definition applies equally to human resource (HR) practitioner and counsellors of Public Employment Services or other organisations. Even though counsellors in an entrepreneurial context usually face different problems and issues, and have another focus on their work activities than other counsellors. A counsellor practitioner usually follows social or organisational standards which differ from company to company. Therefore, the counselling activities can vary profoundly between HR and other counselling practitioners which requires a further detailed distinction.

# 2.1 Counselling in HR

HR practitioners participate and counsel in adaptation processes of working conditions and/or work places. They usually don't counsel employees who leave the company, either due to job loss or to an external job change. A counselling issue could be securing the knowledge. They offer





counselling services for own employees who undergo transition processes, e.g. internal job change or into retirement. The consultations are embedded in a business culture with organisational standards and values. An individual's and enterprise's needs, values and goals should correspond in some part. If this is not the case, it is a counsellor's job in scope of HR to harmonize conflicting goals. Enterprises' strategies follow a future-orientation and longevity which guarantees an employee's career development to stay competitive. But, they also follow profit-orientation which certainly can create conflicting goals with a sustainable human resource's development.

# 2.2 Counselling in Other Areas

In contrast, standards and values that other counselling practitioners usually underlie are primarily based on the individual, the society and partly on an organisation. These counselling practitioners gear individual counselling processes to a client's needs and to the current or imminent labour market needs. This can be advantageous, as the individual's goals can be followed more easily, detached from an entrepreneurial orientation. Anyhow, it can also be disadvantageous if further training or formation cannot be afforded and the counsellor lacks important resources. In general, such counsellors support individuals50+ who seek a new job or who want to change the profession. Another target group are older adults, who face a transition process into retirement who struggle with the transition process or seek for further activities after retirement.

# 2.3 Common Ground of Counselling

It can be concluded that counselling processes of HR and counselling practitioners follow a similar procedure and inherit comparable, multifactorial preconditions despite of the varying environments. Counselling is always influenced in a bi- or multilateral manner, because it has to consider various internal and/or external conditions. These conditions have more or less value for each individual. However, HR and counselling practitioners do refer and use these conditions in counselling in a different manner. In turn, an exchange between both practitioners may reveal efficient counselling techniques and methods, and could be an enriching source for both groups. In this module, the content is equally applicable to HR and counselling practitioners. Even though, when it comes to organisational standards or preconditions, differences are highlighted.

#### 2.4 A Counsellor's Skills and Attitude Repertoire

Furthermore, there has been clarity over a counsellor's attitude towards a client which can enhance the ongoing process and the outcomes. To be able to reflect oneself and the own skills repertoire, a counsellor needs to know the most crucial characteristics of this attitude. One of the most known works in this regard, describes the counsellor as a skilled helper (Egan, 1998). The skilled helper is mainly focused on psychological counselling, however, the basic attitudes are transferable to career





counselling and counselling of individuals50+.

# 2.4.1 Shared Responsibility

Third, counsellor and counsellee contribute mutually to the counsellee's progress and share responsibility to this effect (Egan, 1998). The counsellee agrees to take self-responsibility. The counsellor grants autonomy, empowers the client and enables the client with providing appropriate techniques or tools.

In order to help clients, it is necessary to establish a counselling relationship in a first step, to which counsellee and counsellor contribute mutually. The counsellor should establish the relationship carefully. Certainly central to the consultation is the individual with related processes and outcomes, and not the relationship (Egan, 1998). As Egan (1998) states, the counsellor can promote the progress with his or her attitudes, like genuinenessor authenticity, opennessor trustworthinessas well as empathy. These attitudes shall neither be excessive nor underemphasized. Because behaviour is driven by values, a counsellor should incorporate the attitudes and not act them as a job role (Egan, 1998). This goes along with a counsellor's authenticity. It has to be stated clearly that not all counsellor-counsellee relationships are helpful and enable the client to progress (Egan, 1998). Anyways, one step towards a functioning relationship is the common agreement to rules and norms in communication and the consultation, e.g. respect and openness. The so-called contracting is an initial point and establishes a common base (Berne, 1966).

# 2.4.2 Readiness for Counselling

Besides the initial contract, counselling and its progress requires a client's initial analysis. With this the counsellor can estimate his or her sphere of influence which is necessary to avoid a counsellor's overload. The individual's readiness, the current state in the decision making process should be worked out. This readiness describes the "cognitive and affective capacity of an individual" (Peterson, Sampson, Lenz & Reardon, 1999, p.332). Cognitive capacity describes the awareness of the problem or situation and a person's capability to have the necessary problem-solving skills. Emotional readiness characterizes a client's feeling, e.g. anger, fear or joy. The readiness can also depend on whether the individual participates voluntarily in the counselling process or if an unchangeable problem forced him or her into counselling. This can be for instance, if an older adult loses the job or is forced to retire. This influences an individual's motivation and engagement for goal achievement, and the counselling process in a very different way. However, a problem or issue requires a solution -regardless of voluntary participation- to which the counsellor has to adapt the consultations, methods and progressing, as well as the attitude.

### 2.4.3 Genuineness

As to that: first, the genuineness is the authenticity towards the client. A counsellor behaves





authentic, and doesn't defence own weaknesses (Egan, 1998). "Consistent, caring environments in which independent thoughts and actions are encouraged tend to develop strong, stable self-concepts whereas individuals who experience capricious, abusive, neglecting or dependent environments often develop weak, unstable self-concepts." (Peterson et al., 1999, 322). Additionally long-term effects of non-supportive work environments could be drawn from the project's interviews with HR practitioners. Non-encouraging and non-respectful working environments and conditions can flaw an employee's resources and, even, end in depression. All of a client's arising emotions and doubts are addressed in genuine environments and thus can help the client to solve the own problem sustainably.

### 2.4.4 Openness

Second, an open atmosphere is established in the consultations. This openness begins with the client's initial analysis (Peterson et al., 1999) and covers a comprehensive explanation of the counselling's procedure. Thus, the client feels safe and secure because he or she knows in what to contribute (Egan, 1998). To support openness it can be useful to resume the conversation at the end. Gaps are detected, misunderstandings are eliminated, goals are repeated and emphasized, and progress can be stated more obviously by resuming a conversation.

#### 2.4.5 Empathy

Fourth, empathy is understood as: "[...] an intellectual process that involves understanding correctly another person's emotional state and point of view [...]" (Egan, 1998, p.73). Other literature sources suggest a counsellor's unrestricted appreciation towards the client (Finke, 2004). A counsellor cannot always appreciate a client, especially when it comes to fears about a new job or the retirement or other unfavourable attitudes and behaviour-patterns. To ensure an empathic attitude, a counsellor needs time to think about the answer and give a short response. The answer is authentic but geared to the client (Egan, 1998). Therefore, empathy -instead of unrestricted appreciation- is a counsellor's reasonable attitude. This optimistic attitude towards the client can promote the reflection of the own self-image and self-ideal (Mosberger, Schneeweis & Steiner, 2012).

# 2.4.6 Counselling as Active Listening and Comprehension

The two essential counselling activities for a counsellor are listening and comprehending, which should be reflected in a counsellor's verbal and body communication as well as in the reactions. Basic assumptions are that counselling is a bilateral reciprocal learning process, psychological fragility shall not be overrated and that clients possess potential resources (Egan, 1998); and thus, these three aspects can facilitate a change towards optimistic beliefs and values.





Active listening (Egan, 1998, p. 65f.) can ensure a genuine, open, empathic and empowering attitude towards the client. Four steps explain how to understand people in a better way through active listening. Persons are used to tell about own experiences, behaviours and feelings, to which a counsellor should respond genuinely. It is important to listen and observe carefully without interpreting what the client did or felt:

- 1. To listen and understand carefully the verbal core message
- 2. To observe and read the nonverbal behaviour (e.g. body reaction, facial expression, voice-related behaviour, physical characteristics)
- 3. To listen to the context (social surroundings and other environments)
- 4. To listen to sour notes (a client's potential challenges).

Active listening encourages a client and releases motivation and engagement in the counselling process. Attentive listening and empathic reactions encourages clients in consultations and gives them comfortable and stabilizing feelings (Schulz, 2014). As a result, more individual doubts and issues can be clarified and choices are made in a more sustainable manner (Savickas et al., 2009). To guarantee a trustworthy, open, authentic and empathic counselling atmosphere, a counsellor should be aware of subconscious biases in a communication and relationship. Especially in the context of different roles, a counsellor adopts the teaching, educating, guiding, helping, informing and supporting towards such biases subconsciously.

# 2.4.7 Learning Nugget 15 Selective Perception

The following phenomena can influence a person's attitude subconsciously or consciously. The first two are the most common phenomena. Due to a growing diversity inside the society the last and third phenomenon are getting more and more important, too.

First, the self-fulfilling prophecy. It was proven that students that are expected to perform in a better way, indeed do so (Rosenthal & Fode, 1963). In contrast, students that are expected to perform worse, behave accordingly. This phenomenon was first tested with rats and later with students (Rosenthal & Fode, 1963). Teachers subconsciously change their attitude or questions for smarter perceived students in a way that make it easier for these students to succeed or to perform well (Rosenthal & Fode, 1963). This can be equally applied to stereotypes of older adults, e.g. when it comes to work with computers.

Second, the halo effect. Teachers or counsellors sometimes assume a relationship between two characteristics. Thus, confronted with one characteristic they mistakenly attribute the client or student with a related characteristic. This is why the effect is also called the illusionary correlation. There can be positive as well as negative relationships. Two of the most famous examples are: First, attractive men are expected to perform better. Second, even if obsolete, girls are considered less capable in mathematics and applied disciplines. (Forgas & Frey, 1999).





In case of employees50+, they may be considered too old or too fragile to work properly. Anyways, besides the physical decline, there could not have been proven a relationship between age and cognitive decline (Ng & Feldman, 2008).

Third, stereotype threat. It refers to a teacher's or counsellor's own behaviour. If one fears to undermine the own culture with a negative stereotypical behaviour, he or she tries to avoid a certain behaviour that proves the stereotype. The avoidance of behaviour occurs because the individual wants to protect the own culture. This fear can have negative impacts on self-efficacy and performance. Opposite effects from positive stereotypes on behaviour exist as well (Appel, Kronberger & Aronson, 2011). Examples can be if one has to counsel an older adult and fears not to be perceived as experienced and competent enough. Vice versa, older adults could fear not to show a good performance with a computer and; therefore, don't admit competence gaps.

A healthy, open and trustworthy working base can help to prevent such phenomena. These phenomena often are subconsciously but can be detected with self-observation. This is the reason why reflection in counselling is necessary. Through self-reflection self-fulfilling prophecies, halo effect and stereotype threats can be detected and diminished. To support self-observation and self-reflection of a client, this procedure allows a deeper cognitive elabouration and furthers own proficiency.

# End of Learning Nugget 15

# 3. The Counsellee

For a successful counselling process, it is essential that an individual states an unbiased self-perception and self-appraisal. People suffering from anxiety or depression can hardly participate effectively in an assisted decision-making process or not at all, as cognitive processes dysfunction (Peterson et al. 1999). Pessimistic thoughts show a negative impact on self-efficacy (Bandura, 2009). Hence, it is a counsellor's duty to estimate the client's readiness for consultations. In scope of a client's initial analysis, a counsellor analyses the client's readiness and the own sphere of influence. Therefore, it is legit to ask in the beginning for "negative career thoughts or thinking" (Peterson et al., 1999, p.339). It shall be mentioned that not all negative thoughts equal a depression. A rational amount of negative thoughts is healthy and good for decision-making. The analysed readiness gives insights on how willed a client is to engage in the counselling process. In turn, the level of engagement, is a predictor for the satisfaction of the own decision-making (Hirschi, 2014). In the following, clients' readiness to participate in career counselling is taken for granted. This also covers unbiased cognitive and affective functioning. Depending on the level of dysfunction, anxiety or other types of biases can be solved before or during the career counselling process (Peterson et al., 1999).

Furthermore, the counsellee takes an active or even proactive position in the own counselling





process and contributes –best-case– more or less independently to the outcomes. As said before, a counsellor can be consulted when facing problems in the job, when it comes to job change, job loss or retirement. Persons can have difficulties with the information search process, future orientation, decision-making, planning or implementation of the decision.

# 3.1 Reasons for Counselling50+

Another assumption is that older adults are not necessarily driven to seek advice or support because of a career gap. A career gap represents a divergence between the current state of indecision and a future aspired state (Peterson et al., 1999). Career gaps are considered the reason for counselling in several theories. Anyhow, this assumption cannot be applied to all older adults' issues. Some older adults seek other career possibilities due to own interests without facing a gap. Furthermore, the transition process into retirement cannot be compared to such a gap. Some are looking forward to retirement while others want to avoid it. Further, workers50+ cannot avoid such a gap; especially, when it comes to losing a job. In case of losing a job, the aspired status might not be accessible. Thus, counselling older adults is frequently limited or influenced by relevant external factors, which differ from other counselling contexts and put the individual with his or her needs into background.

### 3.2 Theoretical Overview of career development

At this point, the career development theories shall be briefly recaptured. There are different suppositions of an individual, an occupation, the match of both and accompanied consequences. Each individual possesses a personal competence repertoire that fits to several occupations. Due to the flexibility of occupations, several individuals can carry out the same occupation (Schulz, 2014). In this sense, the individual and the environment build one dynamic unit; both influence each other reciprocally (Savickas et al., 2009). As soon as a personality matches with an occupation and its work environment, job satisfaction, success and career development can be ensured (Holland, 1997). Career development is an on-going process (Schulz, 2014) and depends on career as well as on identity construction (Savickas et al., 2009). In the following we underlie The Career Resources Model of Hirschi (2014) for career construction in which own competences, career goal clarity, hope and the personal networks are relevant for the career construction. Due to the increasing diversity of individuals, even within societies, the key to understand individuals lies in narrative interviews (Savickas et al., 2009; Peterson et al., 1999). This is also the reason why cultural differences are not considered any further in this handbook. Through storytelling an individual's important values and environment are taken into account, which can be captured through active listening and comprehending. Besides, it can be assumed that older adults' transition or adaptation processes take place in environments, with which they can identify and where they are integrated. Thus, the individual's integrated values are taken into account anyways.





# 3.3 Perspective of Counselling50+

It can be concluded that counselling should follow a "life-long, holistic, contextual and preventive" perspective (Savickas et al., 2009, p.6). For older adults this perspective can be translated with the concept of successful ageing, and is characterized with intellectual stimulation through new skills acquisition, maintenance of an active and independent lifestyle, as well as meaningful contributions through activities (Kerz, Teufel & Dinman, 2013). Nevertheless, in this context it has to be emphasized that older adults are individuals and everybody can interpret successful ageing in a different way, which a counsellor has to take into account.

# 3.4 A Counsellee's Skills and Attitude Repertoire

To contribute efficiently to counselling consultations, an older adult should be aware of self-knowledge, occupational knowledge and decision-making skills (Peterson et al., 1999). Self-knowledge refers among others to the ability to self-observe and to evaluate own competences and know-how (Greif, 2008). This is explained in detail in the module's last section about reflection processes.

Knowledge about occupations describes an individual's picture of a profession that was derived from conversations and other sources, e.g. media (Peterson et al., 1999). In the context of older adults, occupational knowledge covers the perspective of working as an older adult. This perspective includes the image and reputation of losing and finding a job as an older adult, or retiring and being retired. All this belongs to careers of older adults, and is the reason why we talk about career decision-making and career counselling. It has to be highlighted that decision-making in this context can be either highly desired, e.g. changing into a more favourable job, which reinforces motivation. Or the decision can be involuntarily, e.g. losing a job, which can be accompanied with strong, pessimistic affective arousal. Hence, the question is: "What can we do as career counsellors to enable individuals to acquire self-knowledge, occupational knowledge and decision-making skills to become effective and responsible career problem solvers and decision-makers?" (Peterson et al., 1999, p.315). Decision-making and problem solving comprise unavoidable or undesired career situations as well.

In general, decision-making is a search process for a good, satisfying or even optimal choice (Kirsch, 1971). This applies to complex problems with an open and unstructured solution. All decisions follow a set order of -regardless if the decision-process is conscious or not- five phases: First, to understand and define the problem. Second, to inform oneself in the search process. Third, to formulate and evaluate options. Fourth, to take a choice. Fifth the post-decisional phase, to evaluate the implementation of the choice. (Ertelt & Schulz, 2008)





# 3.5 Learning Nugget 16 Decision Making

All decisions are individual, as every individual possesses an own set of genetics, experienced a cultural adapted socialization process and lives in an individual environment set, with which one interacts reciprocally. In addition to that, there are external limitations like restricted time, cognitive limitations and imperfect information (Gigerenzer, 2011). That is to say that each individual has limited cognitive resources that are focused on one's own interests and competences. All decisions have to be made at a certain point of time, and cannot be delayed any further. Because of these two conditions, it is impossible to consider and process all information that exists for one decision, and therefore always state an imperfect information position.

So-called heuristics are applied that take into account all three conditions. Heuristics serve to find out and discover information and choices fast and easily. There are different heuristics, for instance the one-reason-decision (the first, the last, the best option), recognition heuristic (best known option, for which one has collected and processed most information), muddling-through (options appear coincidentally) or gut decision. (Gigerenzer, 2011)

To guarantee a termination of the decision-making process, various emotions and/or affects arise. "Career problem solving [...] involves recognizing the full range of human emotions." (Peterson et al., 1999, p.318). In this Learning Nugget, especially four crucial emotional constructs are explained: engagement in the decision-making (Zaichowsky, 1985), perceived freedom (Brehm & Brehm, 1981), commitment to the decision (Janis & Mann, 1979) and post-decisional doubts: cognitive dissonance (Festinger, 1954).

Individuals engage in decision-making processes, if the problem is relevant for them and if they feel responsible for it (Peterson et al, 1999). This equals the autonomy and complexity of goals (Bandura, 2009), which has been explained in Module 3. Therefore, persons get motivated and involved in search processes for information and for choices. The more relevant an individual perceives the decision, the more intensively one wants to inform oneself and the more optimally wants to take the choice. (Zaichowsky, 1985)

However, if one feels impaired in the own decision-making, one can show more effort, because the complexity or impairment is perceived conquerable (internal locus of control). Or in contrast, can result in less effort with an external locus of control. This individual locus of control (Learning Nugget 5, Module 3), the individual motivation and engagement level can induce the scope of effort. Regardless of the locus of control, impairments can be externally with little sphere of control, for example due to legal regulations, job loss or involuntary retirement. With this knowledge, a counsellor can support a client more individually to trigger motivation appropriately and to make the problem relevant to him or her, although the client is confronted involuntarily with the problem. (Brehm & Brehm, 1981)





At a certain point in the search process the individual gathered enough information. It shall be mentioned that too much information, hinders the decision-making or shows negative impacts on it. As soon as the most attractive choice was selected, an individual commits to this option. The commitment guarantees that this option is carried out and executed. After the commitment making, the following phenomenon could occur. If new attractive alternatives appear after commitment, these alternatives are devaluated while the own choice is revaluated. It ensures to stay committed with the own selection, and to overall maintain socially reliable. (Janis & Mann, 1979) In this scope, it is a counsellor's duty to make an individual consider an options' advantages and disadvantages to avoid a biased decision-making, and to guarantee the client can stay committed to the own choice.

In the post-decisional phase, after the implementation of the decision, individuals compare prior imagination and the current state. If the two states differ enormously, persons doubt whether they took the right choice and are unsatisfied. Extreme doubts can even lead to a new search process and decision-making to remake the choice. (Festinger, 1954) Counsellors can prevent extreme doubts in clearing option's disadvantages in advance. Conversations with social referents or responsibles can serve as a helpful method to inform realistically about the later "current status". This method, at the same time, fulfills the precondition of a preventive counselling perspective.

# End of Learning Nugget 16

# 4. Theory of Counselling

On basis of the prior information, counselling can be defined as individual assistance or support. It is a process that enables a person to self-discover the own person and to derive own conclusions, goals, solutions or decisions (Knoll, 2008). "The role of a counsellor can be to help clients formulate the identity in their own words [...]", (Savickas et al., 2009, p.7). When this is applied to individuals50+, a counsellor should be aware of the strong work-experienced personality, as well as the strong merge of career and self-constructs over years.

Counsellors are, amongst others, a helper, guide, teacher, motivator, and supporter and enable individuals to improve the own information search and decision-making competences. One goal of career counselling is the enhancement of information processing skills (Peterson et al., 1999), including information about the own self (Savickas et al., 2009). In particular, in times of new social media, which offer an almost infinite source of information, it is necessary to help clients during the search process and avoid an information overload (Egan, 1998). Especially older adults with a different socialization process of information and communication technologies might need an individualized support for the information search.

#### 4.1 Counselling Paradox





Furthermore, counselling techniques should take client's emotions and rationality into account, whereby several paradoxes formulate the attitude towards progress (Gelatt, 1991 from Schulz, 2014). These paradoxes follow the principles of positive uncertainty, and describe the following attitudes:

- "be focused and flexible about what you want
- be aware and wary about what you know
- be objective and optimistic about what you believe
- be practical and magical
- [be decisive and flexible about change.]" (Schulz, 2014, p. 73).

# 4.2 Characteristics of Counselling50+

Counselling processes usually take place over a short period, have a relatively low level of interactions, and in most cases –except for job loss– depend on voluntary participation (Mosberger et. al, 2012; Ertelt & Schulz, 2008). Certainly, long and interactive-intense consultations can be the result, especially when it comes to involuntary counselling or more complex problems. Involuntary participation shows a different effect on motivation and can be enhanced additionally by external motivation factors.

### 4.3 Theories of Counselling Procedures

All activities carried out within a counselling consultation should be oriented towards the prior described conditions. To be concrete: communication and behaviour rules as well as a joint agreement of goals are set up between counsellor and counsellee in the beginning (Berne, 1966). During the process, counselling is the main activity that contributes to the client's self-exploration phase (Knoll, 2008). For that purpose, various techniques can facilitate and promote the process. There should be always a termination or a follow-up consultation to ensure a client's transfer of the newly acquired know-how into practice and prevent falling back into old routines or habits.

Before concrete methods and techniques are presented, a summary of theoretical counselling procedures and four different approaches are presented. The theoretical procedures allow a counsellor to understand better the processes of problem solving or decision-making. The processes can vary from one individual to another. Therefore, different steps and support methods have to be chosen to allow an individual progress. The initial analysis, the comprehension of the client and the preparation of the counselling can be done more easily with the following theories, since the theories might explain individual's proceeding. For some individuals' analysis and comprehension, it might be even useful to combine theories. Theories of counselling usually follow the scientific approved decision-making procedure, along which all five theories are structured.





Authors	Ertelt & Schulz (2008)	Schulz (2014)	Savickas et al. (2009)	Peterson et al. (1999)	Egan (1998)
Modell/ Theory	Informational	Comprehensive	Life Designing	Cognitive Information	Skilled helper
	structured	strategy	With story-telling	Processing	
Phase 1-5	methodology				
Initial phase				Initial interview	
				2. Preliminary readiness	Initial awareness
				assessment	
	1.To understand and		1. Define problem and	3.Define problem and	2. Define urgency of
	define the problem		set goals	analyse causes	problem
				4.Formulate goals	
					3. initial search for
					remedies / short-time
					solutions
Analysing the		1. Collection and	2.a Determine main		
problem		management of	contexts		
		information			
	2. Information search	2. Adapt and select	2.b Explore client and		
	process	information, individually	subjective identity		
		<ol><li>Adapt, select</li></ol>			
		information of external			
		factors			
Possible	3. Formulate & Evaluate		3. Retell story and open		Estimation of costs for
solutions	alternatives	decision-making	perspectives		different solutions
					5. Deliberation (serious
					weighing of choices)
	Take a choice		4. Problem resolution		Rational decision
			through client change		
Decision-		5. Plan of action	5. Specify further	<ol><li>Develop individual</li></ol>	7. Rational-emotional
making			activities, action plan and	learning plan (ILP)	decision
			potential barriers		(drives action)
				6. Execute ILP	
Follow-up	5. Post-decisional phase	6. Evaluation and follow-	6. Follow-up	7. Summative review	
		up			

Table 1: Overview of counselling theories and counselling procedure

# 4.4 Approaches of Counselling

The four approaches are practically oriented. In opposition to the five prior theories, they do not order the decision-making and counselling process.

The solution-orientation focuses on the present rather than on the past. It is a pragmatic, optimistic approach that emphasizes individual strengths in a natural ongoing. The individual sets own goals, and focuses on the solution rather than on the problem. Problems are something normal and can be solved. If a problem-solution's strategy doesn't work out, another strategy can be chosen. The counsellor's main task is to motivate the individual in the goal-setting, self-appreciation and solution processes and provide assistance for the strategy selection (Mosberger et al., 2012).

The systemic approach is derived from family therapy in which an individual's interactive, social networks are considered and analysed. The constructive perspective assumes that each individual understands subjectively the own self, the own environment and contacts outside the own environment. One can develop, for instance, through a change in perspective which is provoked externally. Thus, the perception and the understanding shifts and involve in a necessary change of the individual (von Schlippe & Schweitzer, 1998).

The resource-oriented method outlines that each individual possesses potential skills for each life phase. Stress is the result of a skills' lack, loss or potential skills' loss. Resources are defined differently in various theories. To follow a consistent supposition, the four resources of Hirschi





(2014) shall be stated here: Resources can be the vocational identity, the psychological resource like hope, the human capital resource like skills or competences, as well as social resources that describe an individual's networks (Hirschi, 2014). The individual is the expert of his or her current situation and seeks help in times of unmanageable stress. Then, a counsellor has to identify and to activate a client's potential resources like skills; has to develop an action plan how to build up the necessary skills and how to adapt the skills to new situations. This can also cover how social contacts support the individual. The counselling process is about establishing a safety base in the client's life. (Beushausen, 2010; Egan 1998)

The client-centred conversation assumes that an individual can fully develop the own potential when the own self-image and self-ideal is fostered appropriately (Mosberger et al., 2012). In this approach unrestricted appreciation is suggested (Finke, 2004). To stay coherent with the training's theoretical input: unrestricted appreciation cannot always be guaranteed, in order to stay true with genuineness, trustworthiness, openness, authenticity and empathy (Egan, 1998). This attitude set is sufficient to meet the individual's needs and appreciation from the training's point of view.

These four approaches are partly overlapping and some other parts opposing. It is good to know them as clients are individual and solution making is diverse. In regard to the approaches, a counsellor can further choose appropriate techniques. These individual adapted interventions shall be chosen flexible for an individual solution. Therefore, a counsellor needs to be familiar and competent with several counselling techniques, so called interventions.

# 4.5 Interventions in Counselling

Interventions, besides active listening, comprehending, empathic answering, clarifying questions, can be various narrating or questioning techniques. They foster cognitive restructuring and problem solving. The counsellor shall be aware that some counsellees require further training to gain e.g. coping skills (Peterson et al., 2009). Therefore, several intervention techniques are presented in the following on basis of Knoll (2008):

**To paraphrase** during or at the end of a counselling conversation one can resume what has been achieved in the meanwhile, and; thereby, emphasizes the current status and progress. Paraphrasing can also take place in the middle of the conversation to clarify the common understanding and to prevent losing track in complex situations.

For complex situations, it can further be helpful to **visualize** the situation. This is a rather creative technique in which the counsellee draws or uses objects to build the situation like with Lego bricks. This also helps clients to view situations from another perspective and reconsider advantages and disadvantages.

Moreover, **circular questions** provoke a perspective change. Several questions make the counsellees narrate the own problem from another's person perspective. This can be especially





useful, when counselling situations seem to be stuck and the client needs another input. Depending on the problem and the aspired outcome, a **role-play** in which a past situation is replayed in an improved way or a future scenario is simulated. To optimize or familiarize the client with situations can facilitate reflection and perspective changes. Due to reflection or perspective change, the client can derive potential improvements and develop mastery strategies to overcome barriers.

Sometimes it is necessary to **feedback** the client, which is particularly helpful in case of complex situations, and when facing difficulties with self-reflection Feedback can also take place before or after an action, e.g. prior to the role-play (Greif, 2008). This equals the guided skill master to some extent (Bandura, 2009), which allows a separation and planning of an action's single skills. Although the client takes a passive role during feedbacking, he or she has to work out the suggested improvements. Therefore, the preconditions of feedback have to be considered.

**Scale questions** capture feelings or processes that are difficult to describe. The scale usually spans from 1 to 10. Counsellors can ask clients how they felt or proceeded after the last consultation. The client answers without reasoning the answer. The counsellor can ask further, what would have been necessary to accomplish a better scale. This method serves as a good entering question or to plan the next action taking.

**Hypothetic questions** are future-oriented imaginations of the client. This interrogation does not serve the final solution, but it serves the individual taking action and finding new ways to solve a problem. It is important to consider the entire solution process, because then one can estimate whether the way and action taking is realistic, desirable and helpful. Examples for such questions can be: If money wouldn't play a role, how would you act? If clients have problems with this technique, or when they are struggling with the progress there can be applied an extreme version of the **miracle question**. This question enhances fantasizing and shall enable the client to find an individual best solution, regardless of whether it is realistic or not. An example is: Imagine you wake up tomorrow and everything is perfect. How would it be?

**Immunization questions** refer to past-mastered situations of the client. These questions are usually used when the client's progress seems to be standstill. The client is desperate and believes not to be able to get out of the situation. Then, the counsellor can question which situations have been mastered successfully and on which competences the success depended. At the same time these questions prevent another standstill and can help people to change the perceived locus of control, from external to internal. (Kuhl, 2001)

However, all these techniques can promote a client's progress. As highlighted several times previously, self-observation, self-appraisal and self-reflection are necessary to recapture what has been good and what still can be improved. This ensures that action taking and problem-solving are designed and applied sustainably.





# 4.6 Learning Nugget 17 Difficulties in counselling

There are numerous clients, to whom counselling wasn't helpful but harmful (Egan, 1998). This can be due to a client's dysfunctional thoughts or not being ready for a counselling process. This is why the initial analysis and the evaluation of the own sphere of influence are very important in the beginning. Besides, the outcome equally depends on counsellor, counsellee and the relationship of both. However, some relationships do not work out in a counselling context. Moreover, the relationship and the beginning depend mostly on the counsellor due to the expertise. This is why the counsellor has to care about the following aspects: not to give a suboptimal impact by assuming a mistaken initial point or offering misleading or individually useless support. In this context, it has to be mentioned that too much help and support teaches a client how to behave passive or inactive. "Helping is not something that helpers do to clients; rather, it is a process that helpers and clients work through together" (Egan, 1998, p. 41).

In this Learning Nugget a negative model of counselling support shall be given. Sometimes it can be helpful to draw a scenario of inefficient methods or negative influences to clarify it more clearly: Counsellors should not offer adapted information, pre-built solutions or ready-made decisions. What counsellors should further not do in conversations and support processes is to misunderstand or to misinterpret client's narrations or explanations. Misunderstandings or misinterpretation are usually appearing subconsciously. This is the reason why first, active listening and comprehension (Egan, 1998); and secondly, reflection and reasoning of overall consultations and interventions are necessary for the entire counselling process (Greif, 2008). In this sense, a counsellor may miss to analyse the client's situation profoundly (Peterson et al., 1999) and; hence, choose impedimental tools, methods and strategies derived from rigid and/or obsolete models from the beginning on. The analysis has to be made carefully because clients often possess and use a variety of values. In addition, a counsellor should be aware that the application of tools and techniques should always be individualized, and when applied, thereby show impacts on the counsellor him- or herself (Greif, 2008).

Clients often talk about what others did or how others felt. Sometimes they even seek for excuses which is not the point of a counselling consultation (Egan, 1998). Obstructive to openness can be unstable relationships among others. It has to be outlined that two individualities define a relationship and some individualities might not work out together in a counselling context (Egan, 1998). Further, not agreeing on common rules, e.g. for communication and joint responsibility, can lead to hindering behaviour and attitudes of both, the counsellor and the counsellee.

Moreover, debilitating effects for counselling can be the counsellee's perception of the counsellor as superior, as an authority with unquestionable orders and with an unsympathetic attitude. This is why active listening and responding with an empathic attitude is necessary (Egan, 1998). Likewise, if a counsellor perceives a client as incapable, goals might be set with overcontrolled (or undercontrolled) support and assistance. This hinders a client's natural solving and decision-





making process (Ertelt & Schulz, 2008).

Equally, overload (or underload) of information, search processes and alternatives should be avoided, as both impede the decision-making process. A counsellee's natural behaviour and need for information has to be taken into account (Ertelt & Schulz, 2008).

All this error-prone behaviour can be diminished. Therefore, it is necessary that counsellors are genuine, trustworthy, open, authentic and empathic. A counsellor has to integrate and express these characteristics in the initial analysis, as well as in the agreement of counselling and the relationship Then a counsellee feels secure to discuss own problems (Egan, 1998). In addition to these soft skills, a counsellor knows how to apply a variety of tools and methods, and regardless of this, is willing to try new things. To guarantee this, a counsellor should continuously self-reflect own activities and the own person. (Greif, 2008).

# End of Learning Nugget 17

# 5. Reflection in Counselling

Until now, the training often referred to self-exploration, self-observation, self-appraisal and self-regulation. In the following the basics of self-reflection are going to be presented and related to counselling older adults.

Self-reflection is more than going over some thoughts and past situations. In scope of this training, the following definition is given: "[I]individual reflection is a conscious process of overthinking [and externalizing] own imaginations and actions. A self-reflection is outcome-oriented when the person can draw conclusions for future actions or reflection processes." (Greif, 2008, p. 40).

Nevertheless, to guarantee an outcome-oriented reflection, evaluation criteria have to be set before action taking. This goes along with a disadvantage: intuitive, spontaneous behaviour or actions cannot be captured and evaluated. Although, such behaviour is often crucial for a successful mastering (Greif, 2008).

Reflection covers a critical contemplation and if necessary a correction of own assumptions, and even values. From this, another supposition can be concluded. If a person is able to self-reflect own thoughts and actions; moreover, he or she is able to organize independently concrete actions which describes the process of self-regulation (Greif, 2008).

### 5.1 Theory of Self-awareness

As we learned prior in this training, human beings are influenceable, and so is reflection. One experiment underlines that self-awareness is crucial to drive responsibility and autonomous action. In the experiment, two groups of students participated in a simulated exam. Students got the exams and were told when to finish it. One group sat in front of a mirror. The second group sat in a room without mirror. In the first group there were 7 % cheating, in the second group there were 71 %





(Diener &. Wallboom, 1976, quoted by Greif, 2008, p. 76). Further, the groups differed in their responses. Those who sat the exam in front of the mirror, gave more self-centred answers. Own feelings were described as more intense, values and actions were more coherent, and reported actions were less frequently harmful. This theory of awareness, describes a phenomenon: If people are more self-aware of own actions and words, they are able to control them more strictly and with higher self-responsibility. Hence, this is a way to encourage autonomy and responsibility, as suggested for performing and mastering situations (Bandura, 2009).

### **5.2 Reflection Techniques**

In the following techniques that can enhance reflection are listed. These techniques can be carried out by a counsellor, by a counsellee or by both.

- 1. **Metacognitive strategies**: this is a step-by-step mental imagination to solve a problem before action taking. It can be helpful to perform new tasks.
- 2. Define **principles** for critical situations. For example no generalizing personal critics.
- 3. Again, **Circular questions**. The client has to describe the situation from another person's perspective
- 4. Feedback: constructive feedback can be helpful. Constructive means no generalized, but professionally reasoned arguments in reference to the initially set transparent goals and performance standards (Bandura, 1991). Feedback can be given in advance, during or after the performance. To guarantee a sustainable development, feedback —also for self-observation and self-evaluation- should be accurate, frequent, prompt and consider the own observation results (Bandura, 2009). Moreover, a counsellor should be aware that people with an external locus of control might not be able to perceive feedback as helpful (Bandura, 1991).
- 5. **Interrogatives** for more objectivity. What?, Where?, When?, Who?, Why? Are essential questions, which can promote problem solving. (Greif, 2008)
- 6. Detailed description of a situation, **relaxation exercises** or **emphasizing the positive** aspects can help to moderate negative feelings (Kuhl, 2001).

The older a person gets, the more integrated are his or her values and activity routines. Hence, the more difficult it is for an older person to change, because his values and norms have been reliably proved and integrated various times (Cedefop, 2011). As shown in Module 3, cognitive input is necessary to keep up cognitive functioning. Active cognitive ageing, promoted through physical workout and appropriate nutrition, can make it easier for an older adult to learn new things (Bryan, 2004) as well as to reflect oneself (Artistico et al., 2003).





# 6. Evaluation Criteria of Counselling

In order to allow a successful and sustainable progress, regardless of whether it takes place in an organisation or an enterprise, it is necessary to reflect consultations or performances regularly. Evaluation criteria set a necessary base for continuous improvement, as they represent transparent goals. Even so, evaluation criteria can also be disadvantageous, because they don't register spontaneous competences for performance mastery. There are several criteria set for the counselling field. However, as the training addresses HR and counselling practitioners, such criteria can be of little use for the HR area. There is further information on qualitative counselling criteria in the workbook and the online portal.

Besides the readiness for and progress in counselling, it is crucial to know for a counsellor in the HR field whether the employee's needs and expectations were met. This is why it is necessary to clarify common goals and make them transparent in the beginning. This helps to establish an action-taking plan. It can be assumed, that only if the employee views the counselling consultation as useful, he or she gets further motivated and strives for goal achievement and good performance. In an entrepreneurial context, counsellors sometimes have no or only little flexibility for goal setting and have to adapt to given enterprise goals. HR practitioners report of a mediation role between working and manager level. Besides, the theoretical derived attitude set of genuineness, openness and empathy, the counsellor needs to know the own area of competence as well as to which extend the employee shall be encouraged and empowered. These factors depend on the counsellee's awareness of the own person, the own occupational knowledge and, finally, lead to a counsellee's motivation and action-taking.

As counselling criteria are qualitative (Katsarov et al., 2014), it can be assumed that the quality of counselling depends on the individual evaluation. This means, the subjectively perceived satisfaction about counselling's results and consequences, decide whether one evaluates counselling as good or bad. From Module 3, it can be derived that satisfaction interdepends with autonomy, effort-taking, performance (Judge, Thoreson, Bono & Patton, 2001) and goal achievement (Bandura, 2009). Thus, if an individual has the feeling to be able to influence the goal setting, and take appropriate actions, he or she is most likely highly motivated to perform well. To perform well he or she will take sufficient effort to ensure goal achievement.

If one transfers this to the counselling process, this means: The counsellee needs to be able to influence the final goal. Furthermore, the counsellee needs adequate support in order to plan effort-taking and performance for the new goal in a best way. It shall be mentioned here, that this is the part of adequate empowerment and encouragement. This is how goal achievement can be ensured, and satisfaction is promoted.





### Conclusion

- HR 1: Attitudes and skills to respond to expectations and fears of 50+
- HR 2: Understand the counsellor's activity field and preconditions for counselling
- Coun 1: Provision of theoretical input that enriches counselling practices and techniques
- Coun 2: Understand the HR practitioners's activity field and preconditions for counselling

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### Module 6:





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# MODULE Peer Counselling



# Trainings Programme: InCounselling50+

Name of Module	Workload	Trainer Guide	Workbook
7. Peer Counselling	120 min	p. 82	p. 127

# **Learning Objectives**

After completion of the course participants are expected to be able:

<u>Superordinate objective:</u> To improve own counselling activities through peer learning or peer counselling.

### Subordinate objective:

- To understand the own counselling skills and attitudes in individual-oriented career counselling with regard to the target group. (TAX 2)
- To evaluate constructively one's own and other's counselling performance. (TAX 4)
- To derive concrete methods and techniques on how to improve counselling consultations and related processes at work. (TAX 4)

### **Learning Content**

- Reflection of own counselling behaviour, skills and attitudes
- Application of selected methods of counselling's evaluation
- Methodology of peer counselling and evaluating other colleagues

This content is not referred to the three sub groups. The content depends on the individually developed cases of participants. Their content is related to practical experiences and real-life problems. Due to participants various backgrounds current topics in relation to the target groups are covered.

### **Self-directed Online Course**

Learning Nugget 20 Video tutorial Peer Counselling





### Content

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# 1. The idea of Colleague Exchange

One crucial issue for counselling older adults is the "holistic, life-long and preventive" (Savickas et al., 2009, p.6) perspective. However, the picture of career counselling until today sticks to educational and career decisions during school, college, university, to further training and education or new professional orientations (Schiersmann & Weber, 2013, p.27). Consequently, this picture is career-long, but not life-long. Going into retirement or losing a job soon before retirement is still widespread connoted negatively. The partially bad reputation that accompanies such processes and roles makes it more difficult for affected older people to stay integrated or reintegrate into work or society. It is remarkable how much a vocational and an identity construct merge over a life span. It seems opposing that suddenly after retirement the person has to seek and adapt to new roles, which most often has little in common with the vocational construct. This can be a deep cut in daily life and might require assistance and preparation, as older adults are often not aware of their new roles. In the own project's findings older adults regularly stated that they are looking forward to the free time, which demonstrates such a profound change of life roles. Simultaneously, we found older adults to be change-fatigue, and therefore should be granted more time to adapt to new, insecure situations. It has to be emphasized at this point that scientific findings require more gradual and incremental transition process models in practice.

Knowing this, and the ongoing ageing workforce, counsellors in enterprises' human resource departments and in other organisations face new prerequisites and challenges. As the field of counselling older adults is a relatively new one, knowledge and know-how can be generated through exchange with other peer groups or colleagues.

This additional module seeks to facilitate a smoother skills transfer into practice and a self-organized competence improvement. This is because many aspects of skills transfer are still unclear and cannot be guaranteed through all trainings (Martin, 2010). In the training this module is part of the second and the third follow-up day. During the second day individual action plans





are done in order to transfer objectives into practice. During the third follow-up day experiences are exchanged.

Colleague exchange is not only about supporting others, but also about preparing the content and methods properly for new colleagues with other or low experience. Preparation requires the ability of self-organisation and the content's reflection to a certain degree. This, in turn, provokes a supporting colleague to process the content in another cognitive manner. Thus, exchange processes, on the job or in counselling, deal with the enablement of others' learning processes and with a counsellor's own learning. Furthermore, the basics of network learning is described. Network learning is a style of collaboration between various professionals that have counselling activities in common and therefore can be declared as a peer. That is the reason why in the following the terms peer collaboration, peer learning and peer counselling are used.

This additional module provides information on how network learning with colleagues and other peers can take place in a company or in the counselling field. In this way, the module's content contributes to the overall goal: "to improve counselling processes through peer learning".

### 2. Peer Learning

Regardless of the issues one faces at work, it can be helpful to exchange with other colleagues (Boud et al., 2001). The exchange with other colleagues or with similar professions can be described as a collaboration, in which peers learn from each other (peer learning). This means, that counselling practitioners exchange about their help and support activities, and learn from others' experiences and know-how (Barlow & Phelan, 2007, p.6). New findings can be concluded by the externalization and the exchange of know-how with other peer members.

"The implicit assumption [for peer learning] is that adult learners are experienced social beings who can act in a collabourative manner, organize themselves, have some intrinsic motivation [...]." (Boud et al., 2001), and carry it out voluntarily and without orders, instructions or control by a manager.

So-called peer collaboration or peer learning supports autonomous, self-regulated learning (Boud et al., 2001; Hendriksen, 2002). In the context of exchanging expertise and finding solutions for complex tasks and cases, the term peer counselling can be used likewise. "Peer collaboration [...] is an equal, non-hierarchical relationship in which each participant is seen as offering a significant contribution to the group." (Barlow & Phelan, 2007, p.6).

Following the assumption of peer collaboration, that all participants are non-hierarchically to each other (Barlow & Phelan, 2007), we suppose that peer counselling is a type of continuous, self-regulated learning through exchanging informal know-how and mutual reflection about a profession. This is one type of network learning.

Since peer collaboration is similar to a counselling consultation, it requires a common set of rules





and norms as explained in Module 6. Therefore, already established norms can be used, but a common agreement and approval in the beginning is necessary. Rules can create safe spaces for openness and specifies the content, in which each individual's security is guaranteed (Barlow & Phelan, 2007). Boud et al. (2001) assume that non-hierarchical persons, just as in peer counselling, meet without competition and, thereby, can grant each other respect. On this respectful basis, the exchange of ideas and expertise is advantageous for all peer partners, and therefore makes mutual learning even more beneficial. The meetings can deal with counselling procedures, other consultation's inputs, outputs or consequences, as well as the reflection of several problems of counselling (Mosberger, Schneeweißer & Steiner, 2012).

Dependent on the level of expertise, peer partners can distinguish profoundly or not. Even though we underlie a non-hierarchical order, if one partner has gone through more experiences than others, he or she can take a dominating advising role. In this case, the relationship is a teacher-learner, a supervisor-supervised, mentor-mentored or coach-coachee hierarchy. In an additional manual for peer counselling the concepts of supervision, mentoring and coaching are explained. It describes any relationship between several colleagues with different levels of expertise. Such relationships are often established in entrepreneurial contexts, when somebody without or with subject-unrelated experiences is introduced into work activities and competences. First, there is explained how peer learning among non-hierarchically colleagues with a similar amount of expertise take place (Barlow & Phelan, 2007, p.6) and afterwards how colleague collaboration in case of diverging expertise levels proceeds.

All types of peer collaboration ensure quality maintenance and continuous improvement, and can follow four different goals:

- 1. enhance the professional, personal development
- 2. enhance the collabourative relationships and work associations
- 3. enhance structural development, e.g. roles, positions or functions
- 4. enhance methodological development, e.g. professional know-how and skills (Belardi, 2002, p.50).

### 3. Peer Counselling

Peer counselling describes the process of receiving advice from other peer partners who have different experiences and knowledge or are comparable social referents (Topping, 2005). In some organisations, peer collaborations were established regularly to guarantee ongoing reflection and continuous learning (Mosberger, Schneeweißer & Steiner, 2012).

Peer groups meet regularly in groups of four to 20 persons (Hendriksen, 2002). The larger the





group, the better structured should be the consultation. Then, all opinions can be considered and beneficial conclusions can be guaranteed. Anyways, there should be always a moderator, who cares about time, rules, and the consideration of each opinion (Hagemann & Rottmann, 2005). The following sequence for peer counselling is suggested:

- 1. All participants present a case / problem
- 2. Selection of the most urgent problem
- 3. Detailed presentation of the selected case and definition of the problem
- 4. Round of questions for clarification
- 5. Round of association for possible solutions
- 6. Comments (from the person who receives advice)
- 7. Round of solution presentation
- 8. Final comments and appreciation for contribution (Hendriksen, 2002, p. 25; Fellinger, 2011, p.2f.)

This procedure serves as a guideline for the video that will be recorded as an exemplary for the project's peer counselling. The video serves further as a video tutorial that is part of the learning nuggets, the self-directed online course.

# 4. Benefits of Peer Counselling

Autonomy and self-responsibility are essential for such a process (Boud et al., 2001; Hendriksen, 2002), which was also pointed out as essential for self-organized and self-regulated behaviour (Bandura, 2009). Moreover, learning in a network integrates especially informal and non-formal acquired know-how (Kuhlmann & Sauter, 2008). It further promotes self-organized learning (Boud et al., 2001), because peers have to reintegrate elabourated content from the peer meetings into work activities.

Additionally, peer counselling can help to discuss solution for a complex situation covering emotional challenging situations. Through discussions and exchange, own attitudes and assumptions can be reflected in more detail (Barlow & Phelan, 2007). The opinion of other counselling practitioners can relativize extreme situations and serve as a feedback, which makes it easier to self-reflect. Furthermore, peer counselling participants reported to care more about themselves through the exchange with colleagues (Barlow & Phelan, 2007). This self-care is crucial for all counsellor's in order to sustain the required counsellor skills and attitudes and to guarantee a counsellors well-being (Barlow & Phelan, 2007).





### Conclusion

- HR 1: Provide constructive feedback for counselling practitioners of other organisation's and other settings
- HR 2: Sensitize participants from other work areas for own problems
- Coun 1: Provide constructive feedback for counselling practitioners of other organisation's and other settings
- Coun 2: Sensitize participants from other work areas for own problems

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