

Learner's workbook for the face-to-face training



This project has been funded with support from the European Commission. This communication reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



Learner's workbook
For the face-to-face training

Intellectual Output 4



This project has been funded with support from the European Commission. This communication reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

© InCounselling 2016 - 2019 | Erasmus / NA BIBB - Strategic Partnerships | 2016-1-DE02-KA202-003399



InCounselling50+

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

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

An enriching collaboration of:

Hochschule der BA, Mannheim (Germany)

MHZ, Hachtel GmbH & Co.KG, Stuttgart (Germany)

CEMEX Hrvatska d.d., Kaštel Sućurac, (Croatia)

University of Split, Split (Croatia)

Jan Długosz University (AJD), Czestochowa (Poland)

Bombardier, Katowice (Poland)

VšĮ "eMundus", Kaunas (Lithuania)

ISBN 978-3-936747-54-6



1 This license lets you (as other party) remix, tweak, and build upon this work non-commercially, as long as you credit InCounselling 50+ project partners and license your new creations under the identical terms.





Contributors

BAKOTIĆ Danica University of Split, Croatia

BARTULOVIĆ Ines CEMEX Hrvatska d.d., Kaštel Sućurac, Croatia

DUDA Wioleta Jan Długosz University in Częstochowa, Poland

ERTELT Bernd-Joachim University of Applied Labour Studies, Germany

EVRENSEL Elif University of Applied Labour Studies, Germany

FETT Stephanie University of Applied Labour Studies, Germany

GOIĆ Srečko University of Split, Croatia

GOLLINGER Thomas MHZ Hachtel GmbH & Co.KG, Germany

GÓRNA Joanna Jan Długosz University in Częstochowa, Poland

GRABOWY Alina Bombardier Poland, Poland

HOLDER Lena University of Applied Labour Studies, Germany

IMSANDE Annika University of Applied Labour Studies, Germany

KOTARAC Mirela CEMEX Hrvatska d.d., Kaštel Sućurac, Croatia

KUKLA Daniel Jan Długosz University in Częstochowa, Croatia

NOWACKA Marta Jan Długosz University in Częstochowa, Croatia

SCHARPF Michael University of Applied Labour Studies, Germany

TADIĆ Ivana University of Split, Croatia

Design: VšJ "eMundus", Kaunas, Lithuania





Introduction

This is the learner's workbook for the face-to-face training of the project InCounselling50+.

In this workbook you find all necessary power point slides, the exercise sheets and space for answers, results, comments and notes. At the end of the Modules 2, 3, 4, 5 and 6 you find additional Case Studies. The sample solutions for the case studies are attached in Appendix B. Some cases are integrated in the classrooms, others are not addressed so that you can do them outside the classroom.

At the end of this workbook you find an assessment and a satisfaction questionnaire. If you want to track your progress, you can assess your competences before and after the training.

Important: This is your workbook. Please treat your data and information with care.

Be the change you wish to see in the world!





Overview

1.	Module 1: Labour Market 50+	1
2.	Module 2: Employer Duties 50+	23
3.	Module 3: Vocational Psychology 50+	43
4.	Module 4: Organisational Behaviour 50+	58
5.	Module 5: Knowledge and Information Management	80
6.	Module 6: Introduction to Counselling 50+	101
7.	Module 7: Peer Counselling	126
8.	Follow-up Day	132
9.	Appendix A: List of questions from HR and counselling practitioners	141
10.	Appendix B: Sample solutions of case studies	145
11.	Appendix C: Assessment and Satisfaction Questionnaire	150

Overview Case Studies

Module 1 Critical incident Succession planning (self-study)

Module 2 Case Study 1 Health as a key factor for fitness

Module 3 Case Study 2 Age friendly onboarding (self-study)

Module 4 Case Study 3 Optimal encouragement for 50+ on the workplace

Case Study 4 Age friendly performance improvement

Module 5 Case Study 5 Optimal knowledge management 50+ (self study)

Module 6 Case Study 6 Adaption of work conditions

Case Study 7 Age-friendly recruitment

Case Study 8 Age and culture friendly recruitment

Case Study 9 Preretirement processes





If you are interested to deepen your knowledge, the online course cover the following topics and units:



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

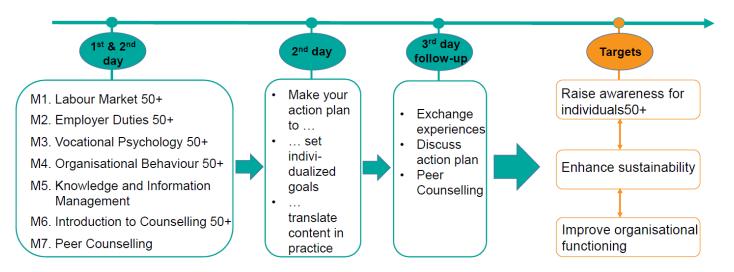
Learning Nugget 19 Case Study 9 Preretirement Process

Module 7 Learning Nugget 20 Video tutorial peer learning



Preparation for the training	Goal	Workbook	Workload
Age structure of your organization	Know figures	p. 13 / 14 (-19)	20 min

Training Timeline



MODULE Labour Market 50+



Learner's workbook: InCounselling50+

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

Learning Objectives

At the end of this course, you are able 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).

You are going to learn about:

- To understand key relationships and processes on the labour market and their potential impacts on organisational level.
- To know most important characteristics and trends on the labour market in the home country, its closest neighbourhood, and the EU.
- To analyse local situation and perspectives (of the labour market) in context of their area of work.
- To understand peculiarities of the people 50+ on the labour market.
- To know the measures of active labour market policies and their impact on the labour market position of people 50+.
- To validate new programs for improving labour market position of the people 50+.

Key words of this Module:

Labour market, Labour supply, labour demand, labour statistics, labour market trends, forecasts, employment rate 55+, retirement age, succession planning, demographic change, age structure, strengths, weaknesses, opportunities, threats









Overview

- 1. Current labour market statistics and trends
- Labour demand & supply
- 3. Principle & agent theory
- 4. Translation of market trends for HRM
 - Employee prospecting (employer brand & referral marketing)
 - 2. Employee retainment
 - 3. Succession planning
- Final Exercise: Analysis of age structure or SWOT analysis

s.com	50PLI	V.IN	ww	TP:M	HT
-------	-------	------	----	------	----

- 3

Exercise 1. Is your HR policy future-oriented? Please consider the following items: (Extracted from Moschhäuser and Sochert, 2006, p. 33) (10 min)

	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.		



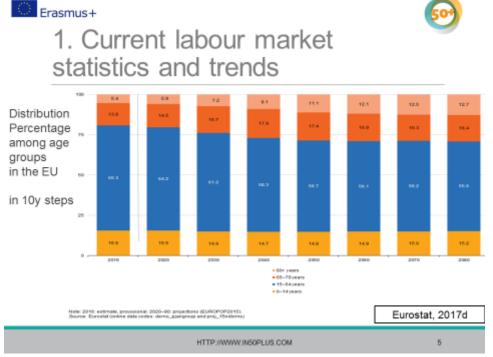


Space for comments	

(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 2014	81,2 years	77,9 years	77,8 years
Life expectancy at 65 years ²⁰¹⁴	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







Distribution percentage among age groups in the EU from 2016 – 2080 (%)

Extracted from Eurostat (2015): Statistiken über gesunde Lebensjahre, Eurostat (2017b) Statistiken zur Fruchtbarkeit Eurostat (2017c) Mortality and life expectancy

Labour Force Potential				
	Germany	Croatia	Poland	
Overall active population	39.175.900	1.563.700	15.811.600	
(20-65)				
Percentage AP of overall	78 %	60,5 %	67,8 %	
рор.				
% 55-65 active population	66,2 %	39 %	44,3 %	
% 55-65 inactive population	4,6 %	16,3 %	7,5 %	
Legal retirement age ²	M & F 65y3m	M 65y; F 61y3m	M 65y7m; F60y7m	
Future retirement age = 67	Until 2031	Until 2038	Until M 2020/F	
			2040	
			Abolished	
			in11/2016	
Early retirement age	63 (58?)	60		
Contributory period (for early	35y (35y)	15y (35y)		
r)				





Extracted from Eurostat (2017d): Population structure by major age groups, EU-28 and Employment statistiscs.

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

Extracted from Eurostat (2017e): Employment statistics.





Optional part of 2. Labour Market and 3.Information Asymmetries

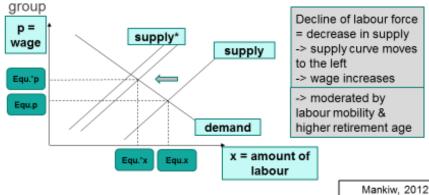




2. Labour demand & supply

Classic labour market model:

The market for one profession and a concrete labour force



HTTP://WWW.IN50PLUS.COM

14





2. Labour demand & supply

Assumptions of classic labour market model:

- 1. Profit maximizer
- 2. Perfect competition
- 3. Homogenous goods (= labour)
 - Growing diversity among older cohorts due to more and various experience in work and private life
- 4. Perfect information
 - -Information asymmetries between employer and employees, e.g. about physical conditions, health situations and real intrinsic needs of employees50+, those in transition to retirement and jobseekers50+
 - Also information that individuals 50+ don't want to show

Mankiw, 2012

HTTP://WWW.IN50PLUS.COM



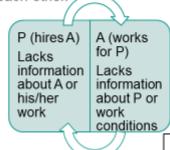






3. Principle & agent theory

Definition: Information is usually symmetrical and incomplete. The incompleteness of information as such isn't problematic. The asymmetry can cause market failure and arises when two market participants have too different or no information about each other.



HTTP://WWW.IN50PLUS.COM

4.0

Eisenhardt, 1989





3. Principle & agent theory

Especially the case, when enterprises do not update own information or miss to ask about potential job change, retirement, etc.

- How could an employer or an enterprise avoid such information gaps?
 - detect information gaps
 - improve communication making information more transparent for A and P
 - reveal individual opportunities (individual for enterprise & employees)

HTTP://WWW.IN50PLUS.COM









4. Translation of market trends

Why is it important for enterprises and other institutions to keep track on their own?

- · Only 5 % feel supported by politics
- · Politics follow the two European regulations:
 - To raise retirement age to 67 years
 - To increase employment rate for people55+
- · Therefore, early retirement etc. are made unattractive
- Companies' proactivity is demanded

Morschhäuser & Sochert, 2006

HTTP://WWW.IN50PLUS.COM

15





4.1 Demographic change

Why is this important?

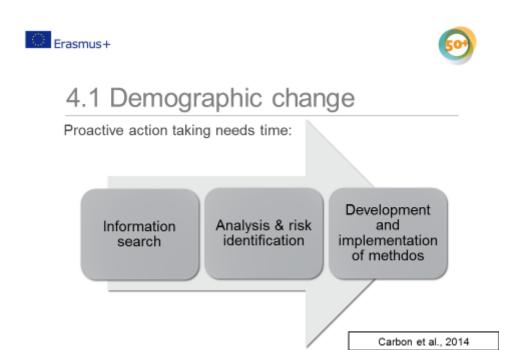
- Because in Germany and Austria only 7 % identify and analyse risk areas
- Because only 3 % develop and implement methods
- · To prepare/respond appropriately to demographic change
 - Several years of planning are necessary
 - The temporal perspective should be prolonged (3-5 years)
 - The need for action is now
 - Clever combination of prospecting, retainment and development

Carbon et al., 2014

HTTP://WW/W.IN50PLUS.COM







HTTP://WWW.IN50PLUS.COM





4.2 Succession planning

- Failure often is attributed to misfunctions between organizational and HR strategy
- This is why a harmonization of both strategies and regular alignments are necessary
- To bring together both strategies the following seven components are suggested:

Rothwell, 2010, p. 122

HTTP://WW/W.IN50PLUS.COM









4.2 Succession planning

Harmonization of organisational and HR strategy





Exercise 2. "How are decisions made about successors for positions in your organisation? "

(Extracted from Rothwell, 2010, p. 109): (10 min)

	No
1. We usually wait until a position is vacant.	
2. We secretly prepare successors.	
3. Whenever a position opens up, we rely on expediency	
to identify someone to fill it, hoping for the best.	
-	
·	
peopie wno could be good employees."	
Space for comments	
 4. 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. 	









4.2 Succession planning

Crucial aspects

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

Rothwell, 2010

HTTP://WWW.IN50PLUS.COM

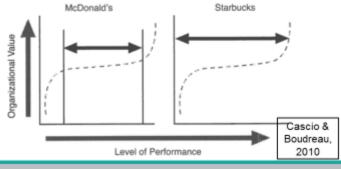
25





4.2 Succession planning

- Perspective change:
 - Enterprises focus on performance improvement
 - But not on the value of an employee in the enterprise
 - Employee in DR (development & research) vs a clerk
- Generalization of all employees (McDonalds)
- Individualization of employees (Starbucks)



HTTP://WW/W.IN50PLUS.COM





Exercise 3. Age structure (HR)

- A. For HR practitioners: Analyse the age structure of your staff.
- 1. Number of employees per year of birth / per cohort OR average age
 - a. size of workforce
 - b. recruitment to what extent needed?
 - c. staff turnover
 - d. retirement
- 2. If older employees predominate:
 - a. when do they probably retire
 - b. is there a threat of staff bottlenecks or a loss of expertise?
 - c. Procedures for systematic and early knowledge transfer
 - d. Are there health, qualification or deployment problems with older adults.
- 3. If middle-aged employees predominate:
 - a. It is to be expected that they stay in the company?
 - b. Will they go later into retirement than today's old generation?
 - c. How can work ability and performance be maintained and promoted (to ensure innovativeness?
 - d. Do they conceal risks of increased absenteeism?
 - e. What counteractions to take to in good times to secure know-how?
 - f. Are trainees/apprentices needed to balance age gaps
- 4. Evaluate single work, teams or departments if the enterprise is big
- 5. Reflection of older adults ratio
 - a. Is the higher age average problematic? It could be useful under consideration of work demands?
 - b. Can priorities be derived for an age-appropriate work design?





Exercise 3. Age structure (counsellor)

- A. For counselling practitioners: Analyse the age structure of your staff.
- 1. a. Number of employees per year of birth / per cohort / average age
 - b. Number of clients
 - c. How many clients do you counsel overall / per week?
 - d. Number of overall consultations and over which time period?

2. For older clients:

- a. When do they probably retire?
- b. Do they inherit key resources / key competences? Maybe you need to differentiate between sectors or professions?
- c. Procedures for systematic and early knowledge transfer
- d. Are there health or qualification problems with older adults?

3. For middle-aged clients:

- a. Is it expected that they can stay in the company / find a job?
- b. Will they go later into retirement than today's old generation?
- c. How can work ability and (re)integration be maintained and promoted?
- d. Do they appear reliable (e.g. participate actively to consultations, show up on time, etc.)?
- e. Are clients willed to share knowledge? How would you motivate them to do so?

4. Reflection of older adults ratio

- a. Is a higher age average problematic? What do you think: which work demands does older staffs face?
- b. Can priorities be derived for an age-appropriate work design? What would you recommend HR departments?







1	
1	
1	
1	
1	
1	
1	
1	
1	
1	







		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		l
Í		
Í		
Í		
		I
		l
Í		







1		
		I





Recommendations (extracted from Morschhäuser and Sochert (2006). Healthy Work in an Ageing Europe, p. 24)

The age structure data provide indications of possible HR challenges which can only be estimated more precisely in connection with other circumstances and developments in the company. If the age structure exhibits noticeable frequencies of certain age groups, questions can be formulated in the follow-up which should be discussed in the personnel management,

for example:

If older workers predominate (age structure centred on older workers):

- Is the time of the probable retirement of the employees known?
- Is there a threat of staff bottlenecks or a loss of expertise owing to the departure of the older workers?
- Are there procedures for the early and systematic transfer of knowledge in the company (e.g. succession and mentoring models)?
- Do health, qualification or staff deployment problems frequently arise with the older employees?

If middle-aged workers predominate (age structure centred on the middle-aged):

- Is it to be expected that the middle-aged workers born in the years with high birthrates will remain at the company in the long term and therefore also age together as a group?
- Will they go into retirement at a later date than today's older generation?
- How can the work ability and performance of this large age group be promoted so that reductions in performance can be largely prevented as they grow older?





Exercise 3. Age Structure

B. Evaluate strengths, weaknesses, opportunities and threats of your staff's age structure!

Internal analysis External analysis	Strengths	Weaknesses
Opportunities	SO strategy	WO strategy
Threats	ST strategy	WT strategy



Self-study: Critical incident Succession planning.

Considering current labour market trends and forecasts, how would you react in the following situation?

"Assume that you lose or have lost a key department manager on short notice […] (You can chose any department you wish.) Who is ,ready' to assume that position? Name anyone. "					
Moreover: How would you board him/her on the new position?					
"Moreover: How would you board him/her on the new position?					
"Moreover: How would you board him/her on the new position? Who would substitute the other vacant position?					





Future scenario 2025

"Imagine the prior case would happen in your company in 4 or 5 years ...

- Are you aware of your age structure? (Exercise 5)
- Would you still be able to fill your vacancies easily?
- Do you know what are your strengths and weaknesses of your staff's age structure?

Collect the following arguments for a possible discussion:

- Which future trends do you expect?
- What impact will they have on your HR management?



MODULE Employer Duties 50+



Learner's workbook: InCounselling50+

Name of Module	Workload	Handbook	Trainer Guide
2. Employer Duties 50+	120 min	p. 19	p. 12

Learning Objectives

At the end of this course, you are able to conclude employer duties from legislation, from evaluation of 50+'s work ability, and from possible impacts on your organisation.

You are going to learn about:

- Legal aspects of further education and training (as an employer duty) to prevent older adults exclusion from learning.
- Legal aspects of employers' obligations to establish a safe working environment and secure working conditions.
- Helpful health management activities in the company.
- Most important national programs for the transition process into retirement.
- Legal regulations regarding retirement and company pensions.

Key words of this Module:

health management, physical health, subjective health, active ageing, mental fitness, retirement models, transition management, legal retirement, work ability index, absenteeism, work accidents, fluctuation rate, participation rate, corporate climate, further education, personnel development, recruitment50+, skill obsolescence, demographic change management









Overview

- 1. Legal Regulations for Further Training
- Further Education as an Employer Duty
- 3. Training for Older Employees
- Health Management in organisations
- Strategies and Instrument for Development
- Transition Management

HTTP://WWW.IN50PLUS.COM





1. Legal Regulations for Further Training

On European Level

- · based on subsidies instead of laws
- Grundtvig (part of Europe 2020)*
 - Combat educational challenges with regard to an ageing population
 - Expand and deepen knowledge of adults
 - o Financial support for teachers, trainers or HR staff

On National Level

- basic right to education
- merely no laws for further training

HTTP://WWW.IN50PLUS.COM

ţ









Further Education as an Employer Duty

- The basis of organisational development is the development of the individuals who form the organisation
- Main objective of training:
 - to improve the qualities of the trainee
 - to increase personnel efficiency, professional growth, smooth & effective organisation's operations
 - to solve problems

Olaniyan & Ojo, 2008

HTTP://WWW.IN50PLUS.COM

R





Further Education as an Employer Duty

- Possible reasons for problems:
 - insufficient productivity
 - low quality of work
 - new tools, machines, processes, methods
 - waste, accidents, turnover, lateness, absenteeism
 - changed policies or regulations
 - obsolescences in skills, technologies, products, markets, capital management

Olaniyan & Ojo, 2008

HTTP://WW/W.IN50PLUS.COM









3. Training for Employees50+

 Short period of employment left → no incentive for companies to invest in people 50+

WRONG!

- Trend: knowledge with a short half-life (e.g. technology)
- Need for continous improvement and development
- Every age is important for the organisation

Armstrong-Stassen, 2005; Kistler, 2002

HTTP://WWW.IN50PLUS.COM

9





3. Training for Employees50+

- Currently little attempt to adjust training methods to meet needs and learning styles of older employees
- Training methods should focus on:
 - "hands-on" learning technique
 - Be self-paced
 - Practical learning approach

Illmarinen and von Bonsdorff (2007)

HTTP://WWW.IN50PLUS.COM









4. Health Management

Health Management describes the **systematic development** of **organisational frameworks**, **structures and procedures** regarding **health supporting** work conditions.

HTTP://WWW.IN50PLUS.COM

11





4.1 Relevance for Organisations

- · Increased complexity of work, and demographic change
- To replace older employees with younger ones is a difficult strategy: organisations have to present themselves as attractive employers to compete over limited resources
- Health management for managing demographic change and changed needs of a society

HTTP://WWW.IN50PLUS.COM









4. Health Management4.2 Relevance for Older People

- Difference between objective and perceived health
- Perceived health changes over time
- Correlation between perceived health and objective health decreases
- Older people use different criteria to evaluate themselves, e.g. comparison with people of the same age
- Focus on physical health and diseases
- Raising awareness for mental health and diseases
- Mental health & physical health are equally important

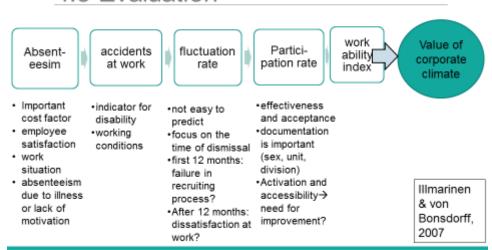
HTTP://www.insoelus.com

13



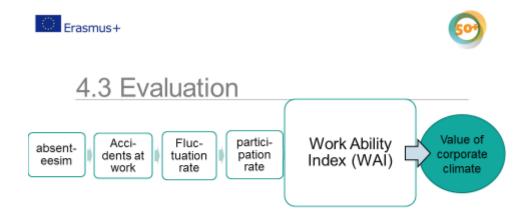


4.3 Evaluation



HTTP://WWW.IN50PLUS.COM





Illmarinen & von Bonsdorff, 2007

HTTP://WWW.IN50PLUS.COM

15





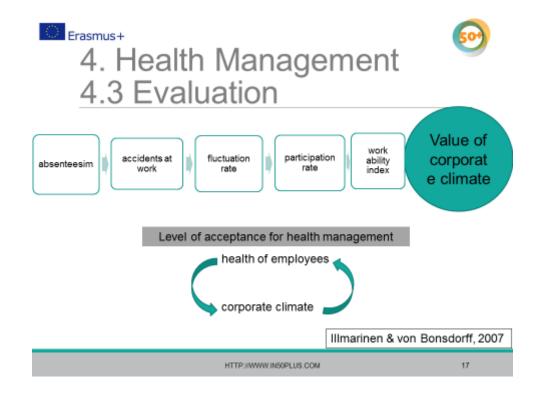
4.3 Evaluation













Exercise 1. (10 min)

Please have a look at selected parts of the WAI questionnaire. Feel free to evaluate your employees / clients.

Work Ability Index (WAI) - Questionnaire (Long Version)

Is your work:		
psychologically demanding?	O ₁	
physically demanding?	O_2	
physically and psychologically demanding?	O_3	

1. Cui	rent worl	k ability o	ompare	d to high	est worl	k ability	ever:			
Assume that your work ability at its best has a value of 10 points. How many points would you give your current work ability? (0 means that you currently cannot work at all)										
O _o	O ₁ etely	O ₂	O ₃	O ₄	O ₅	O ₆	O ₇	O ₈	O ₉	O ₁₀ work ability
unable	to work									at its best

2. Work ability in re	elation to demand	s
How do you rate yo your work?	our current work a	ability with respect to the physical demands of
very good	O_5	
rather good	O_4	
moderate	O_3	
rather poor	O_2	
very poor	O ₁	
your work?		ability with respect to the mental demands of
very good	O_5	
rather good	O_4	
average	O_3	
rather poor	O_2	
very poor	O ₁	



4. Estimated work impairment due to diseases	
Is your illness or injury a hindrance to your current jobs? Circle more than one alternative if needed.	
• There is no hindrance / I have no diseases. O ₄	O_6
I am able to do my job, but it causes some symptoms.	O ₅
• I must sometimes slow down my work pace or change my work methods.	O_4
I must often slow down my work pace or change my work methods.	O_3
Because of my condition, I feel I am able to do only part time work.	O_2
In my opinion I am entirely unable to work.	O ₁

5. Illness within last year	12 months)	
During the last 12 months: how many whole days have you been off work:		
none	\mathbf{O}_5	
max. 9 days	O_4	
10-24 days	O_3	
25-99 days	O_2	
100-365 days	O ₁	

6. Estimation of own work al	biliy in 2 years
Do you believe, according to your present state of health, that you will be able to do your current job two years from now?	
unlikely	O ₁
not certain	O ₄
relatively certain	— O ₇

Considering the last three months: Have you been able to enjoy your regular daily activities?		
often	O_4	
rather often	O_3	
sometimes	O_2	
rather rare	O ₁	
never	\mathbf{O}_{\circ}	





	•	
always	O_4	
rather often	O_3	
sometimes	O_2	
rather rare	O_1	
never	O _o	
Considering the last three future?	e months: Have you felt y	ourself to be full of hope about the
permanent	O_4	
rather often	O_3	
sometimes	O_2	
rather rare	O_1	
never	\mathbf{O}_{o}	

Add the figures of your crossed boxes and calculate your final score: _____

Exercise 1.b. (15 min)

Write down what you find beneficial and unfavorable of WAI.

Prepare for the discussion!

Advantages of WAI	Disadvantages of WAI









4.3 Evaluation

Possible Solutions:

- Advantages:
 - Easy to interpret thanks to a
 - 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
- Disadvantages
 - Employees might not be honest
 - Not usable for work safety
 - No adaption since 1980 (was just developed for retirement purposes)
 - No concrete methods
 - Evaluation through HR might be difficult, a doctor should be contacted as well

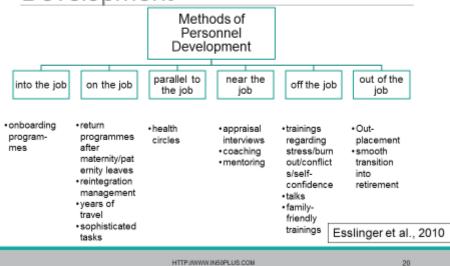
HTTP://www.insoelus.com





20

5. Strategies and Instrument for Development









5. Strategies & Instruments for Development

Further personnel development activities - soft factors

- cantine with healthy food
- employee survey
- sport offer
 - o company run
 - training courses
 - work place gymnastics
 - gym discount

HTTP://www.insoplus.com

-





5. Strategies & Instruments for Development

Further personnel development activities - soft factors

- combating of addictions
 - smoking cessation
 - information about therapy offers
 - talks for raising awareness
- · medical check up
 - free flu vaccination or travel vaccinations
- non-monetary incentives
 - annual health vouchers for gymnastics, yoga...



HTTP://WWW.INSOPLUS.COM





6. Transition Management

Optional Exercise 2.

a) Which would be used for a greath transition process.
a) Which models could be used for a smooth transition process?
h) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?
b) How can organisations motivate employees to work after retirement?





c) How can such models be financed?





6. Transition Management - Models

- · Company pension scheme
- Partial retirement
- Job sharing
- Time accounts
- Demographic funds
- · Age-friendly workplaces

HTTP://WW/W.IN50PLUS.COM





Exercise 3. (30 min)

Together with your group, read through the given case carefully.

Module 2: Case Study 1 Health as a key factor for fitness

Name	Mr. IVO IVIĆ
Birth date and	59 years old, born in Zagreb
place / age	
Residence	Zagreb, Croatia
Highest	Elementary school, working as unqualified worker in manufacturing
educational	industry
qualification	
Family status	Married, 2 children
Description of	He is married and lives with his unemployed wife in a small town near
situation	Zagreb. He has a bank loan. He has been working as a production
	worker (blue-collar) in a manufacturing industry for more than 40 years.
	During the last few years he had been facing decline in overall health
	that had an impact on his performance. He has developed a disease
	last year that has significantly reduced his ability to perform physically
	demanding job tasks he used to perform before.
	Not only his ability was reduced, but due to legal requirements (valid
	medical certificate) he is no longer allowed to perform most of the tasks
	he used to. That has discouraged him because the legal retirement age
	is 65 and early retirement goes along with penalties and his pension
	funds will be low.
	He cannot continue contributing to the workplace like he used to before
	and is therefore having pessimistic thoughts mostly related to his future
	inside the company and his financial situation. On the other hand,
	possibilities for an internal career change are quite limited due to his
	level of formal education and his competencies. Therefore, the
	employer does not have many options for e.g. job rotation, and needs to
	implement a work arrangement that would be beneficial for both the
	employee and the employer.
Problem	Mr. Ivić is facing decline in overall health and has developed a disease
definition	that has huge impact on his overall performance.
	How would you as an employer/HR practitioner proceed?





What would	you suggest?		
Think of			
	strategy		
a)a	strategy		
	strategy		







b)	concrete instruments
-1	have stite and about a rea
C)	benefits and challenges





d.	Conclusions / Comments:





Summary

- No specific legislation
- But regulations on education, equal treatment etc. can be applied in context of individuals50+
- · Health management and
- Further education and development
- Foster cognitive and physical fitness of employees50+
- Ensure to establish an age-friendly work environment
- Age-friendly also refers to optimal and smooth transition processes
- Promote integration and reintegration of employees50+, jobseekers50 and employees in transition to retirement

HTTP://WWW.INSOPLUS.COM



MODULE Vocational Psychology 50+



Learner's workbook: InCounselling50+

Name of Module	Workload	Handbook	Trainer Guide
3. Vocational Psychology 50+	120 min	p.38	p. 45

Learning Objectives

At the end of this course, you are able to optimize the working environment for 50+ under consideration of employee behaviour, self-efficacy and self-regulation.

You are going to learn about:

- Different career development periods including physical and psychological ability, especially for people 50+.
- Relations between personal life and career development.
- Requirements of of older adults' self-efficacy.
- Appropriate self-regulation in transition processes.
- Extrinsic and intrinsic motivation of individual employees 50+, employees in transition, and unemployed 50+ in the workplace.

Keywords for this Module are:

Career development, vocational interests, life roles, life goals, trait & factor, life rainbow, social cognitive career theory, career resource model

Motivation, self-efficacy, self-regulation, self-confidence, work support, job satisfaction, feedback, self-appraisal, skill transfer





Exercise 1. Brainstorming (10 min)

Please answer the two questions below:

0	When would you describe a person / an employee as old? What characterizes such an old person?









Overview

- 1. Employee behaviour
 - 1. Motivational preconditions
 - 2. Self-efficacy beliefs
 - 3. Self-Regulation
- 2. How to be ageing-friendly?



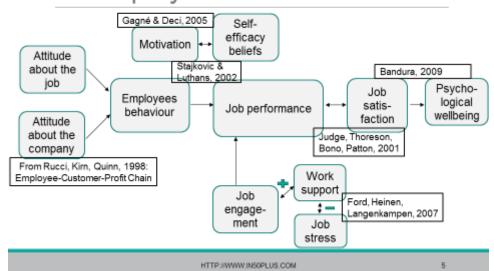
HTTP://WWW.IN50PLUS.COM

.





1. Employee behaviour









1.1 Motivational preconditions

- Motivation is related to self-efficacy and drives performance
- Motivation at work: integration of social standards into personal standards

	Extrinsi		
External motivation: extra pays (Low integration of social standards Employee behaves to integration.	Autonomy controlled: oderate egration of social standards overall goals, ove boring task	Personal interest
			Gagné & Deci, 2005 Stajkovic & Luthans, 2002
	HTTP://W	VW.IN50PLUS.COM	6





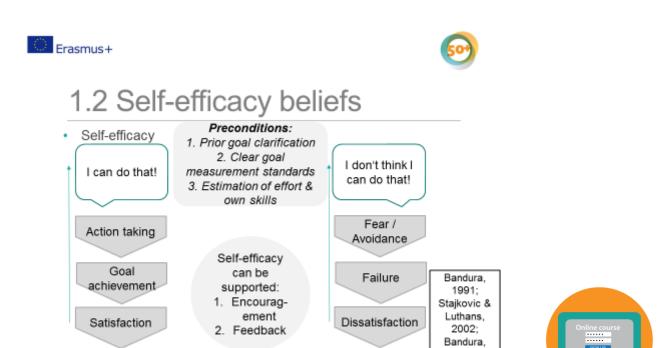
1.1 Motivational preconditions

Motivation differs among Age Gender & Age **Education &** Emotional Male: From Age satisfaction, e.g. achievement to Respect & caring for others concern with recognition for Autonomy in un-,semiothers, work tasks mentoring and &skilled Personal community workers principles, Female: From Respect & recognition for meaningful work working with activities pleasant people all, but highly Inceoglu, Maintenance > & good hours to motivating for Segers & Bartram, growth independent & manager & Intrinsic > assertive autonomous 2012; own survey, Extrinsic employees 2017

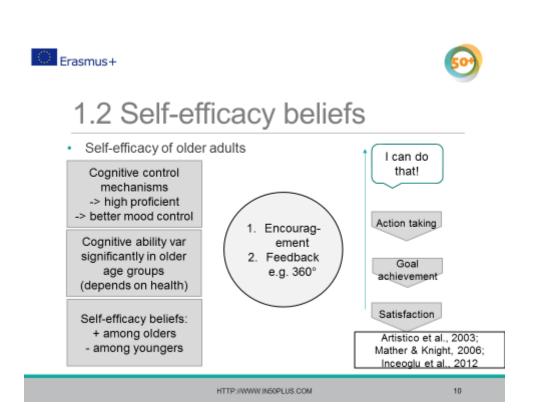
HTTP://WWW.IN50PLUS.COM







2009



HTTP://WW/W.IN50PLUS.COM









1.2 Self-efficacy beliefs

Self-efficacy differs among

Age

- Poor selfawareness of own deficits
- If awareness, most likely avoidance behaviour
- Overestimation within the same peer
- Underestimation among younger colleagues

Gender & Age

- Male: In general, tend to overestimate own abilities and competences
- Female: In general, tend to underestimate own abilities and competences (esp. Housewives)

Education & Age

- Academic jobless people tend to overestimate own situations
- Low educated jobless tend to underestimate their abilities

Inceoglu, Segers & Bartram, 2012; own survey, 2017

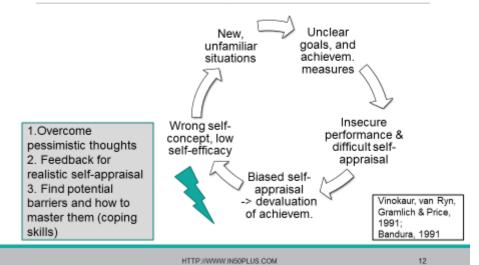
HTTP://WWW.IN50PLUS.COM

13





1.2 Self-efficacy beliefs



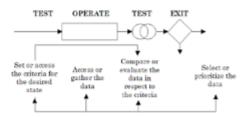






1.3 Self-regulation

Self-regulatory behaviour



- Reactive, no proactive actions
- Self-appraisal is reliable and unbiased
- Feedback is necessary

Miller, Galanter, Pribram, 1960

Proactive behaviour by granting autonomy and complex tasks

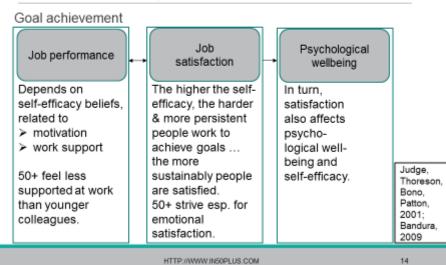
HTTP://WWW.IN50PLUS.COM

-13





1.3 Self-regulation









1.3 Self-regulation

Optimal support for transfer of new skills Model Guided skills enablement: perfection: Learning skills

- step-by-step + techniques, Modeling fosters selfefficacy
- High efficacy = more complex tasks
- Facilitates performance
- Selection of appropriate tasks
- Gradually increasing complexity and autonomy
- Feedback what can be improved / to detect gaps

Cognitive modeling:

- Coping strategies to overcome fears
- Imagination of mastery
- Observation of similar colleagues



HTTP://WW/W.IN50PLUS.COM

Bandura, 2009





1.3 Self-regulation

50+ show more left pre-frontal brain activity

- More experiences, practical know-how
- When it comes to learning with 50+:
 - Hands-on-techniques
 - From examples to general (inductive learning)
 - Transfer content directly into practice
 - · Practice oriented/real life exercises & tasks
 - Short learning sequences with regular repetitions



HTTP://WWW.IN50PLUS.COM









1.3 Self-regulation

Retirees

- Consider subjective or occupational age
- Think about individual readiness to retire
- Think about optimal transition process
- Prepare mentally for new life roles
- Activity in retirement

Jobseekers 50+

- Job loss short before retirement, socially bad attributed
- Low self-awareness of own deficits
- Reactivation of housewives
- · Low self-confidence
- Unfamiliar with current labour market trends
- · Train coping skills

Vinokaur, van Ryn, Gramlich & Price, 1991; own survey 2017

HTTP://WWW.IN50PLUS.COM

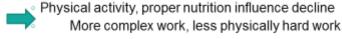
16





2. How to be ageing-friendly?

- What does age indicate? (Recapture the initial brainstorming)
 - Biological age
 - Subjective age
 - Professional age
- · Biological decline, but no cognitive decline



 Adaptation of work places and work conditions (module 2): ergonomic chairs, fresh fruit, company sports program, adapted shift times

Ng & Feldman, 2008; FitzGerald et al., 2017

HTTP://WW/W.IN50PLUS.COM





Optional Exercise 2. (10 min)

List main characteristics of employees 50+ in your enterprise / organisation.
Exercise 3. (10 min)
·
a. Which enterprise values correspond to 50+ characteristics in your company?
(E.g. enterprise value: job satisfaction since it triggers higher performance).
h Are adequate management for inh potinfection for ample (2005), given in your
b. Are adequate measures for job satisfaction for employees50+ given in your
company?
How do you promote age-friendly feedback to foster jobseekers'50+
satisfaction?
Sausiasiis.



Discussion (20 min)

0	Which arguments can convince your colleagues to establish age-friendly values?
0	List arguments as well as counterarguments!









Summary

- Motivation, self-efficacy and self-regulation differ among age groups, among gender and educational background
- Individuals50+ show shifted needs and values
- This is informative for the design of employer branding
- Individuals50+ often have difficulties to self-appraise themselves
- Individuals50+ learn in a different way
- This provides insights how to design learning opportunities for 50+

HTTP://WWW.IN50PLUS.COM



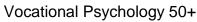


Module 3: Case Study 2 Age friendly onboarding (self-study)

	Online
Name	Miss Muster
Birthdate	xx.xx.1967
Resident	Baden-Württemberg (a south-western German state)
Highest graduation	Apprenticeship as an industrial management assistant
Family status Married, no children, a mother in need of care	
Description	Miss Muster graduated from secondary school in 1985. Afterwards, she accomplished an apprenticeship as an industrial management assistant in a small industrial company with around 100 employees. After her graduation she was occupied in the area administration/financial accounting. There she had several general activities, e.g. accounting of invoices, time registration, correspondence, date coordination for the management.
	The company had been run by the owner. Then, seven months ago a bigger enterprise absorbed the company and centralized all administrative processes. As a consequence, the work place of Ms Muster was relocated to the new head office, 30 km away from the old office. Ms Muster accepted the new position in the area of financial accounting after a long time for consideration.
	In the meantime, she faces health limitations (with her shoulder) and is employed part time for three months in order to care for her care-dependent mother.
	The new job covers only accounting activities, e.g. invoice control and balancing. She feels restricted and overchallenged by the new tasks and the new organisation. In addition to that, she has to work with an ERP (enterprise resource planning) system that is unfamiliar and new for her. The new team consists mainly of young women, who were further employed after their apprenticeship. Due to Ms Muster's absenteeism and part time for her care-dependent mother, massive tensions appear in the team. Her team leader recognises that Ms Muster has not participated in further education or training for various years, which makes it even more difficult for her to learn new content and processes. Until now she has refused to participate in further education opportunities, because she always had mastered all demanded tasks on her own. She only would need more time and it would be necessary to consider the situation with her care-dependent mother appropriately.
Problem definition	How can an age-friendly onboarding be established in this case?









'	Case Study 2 Age friendly onboarding				



MODULE Organisational Behaviour 50+



Learner's workbook: InCounselling 50+

Name of Module	Workload	Handbook	Trainer Guide
4. Organisational behaviour 50+	120 min	p. 63	p. 36

Learning Objectives

At the end of this course, you are able to derive strategies in accordance with organisational structures, performance measurement and leadership behaviour on how to integrate employees 50+, employees in transition and unemployed 50+.

You are going to learn about:

- Most relevant theoretic aspects of organisational culture, motivation, and leadership.
- · Ways and problems to influence organisational behaviour.
- Motivation and other behavioural aspects of a particular group and/or organisation.
- Plans to integrate employees 50+, employees in transition, and unemployed 50+ into organisational culture.
- Structures and instruments to motivate employees 50+, employees in transition, and unemployed 50+ for further work and learning.

Keywords for this module are:

Organisational or corporate culture, types of organisational culture, competing value framework, subcultures, motivation, content theories, process theories, motivational factors, leadership, leadership styles, performance evaluation, rewarding system









Overview

1. Organisational or corporate culture

- 1.1. Functions and types of organisational culture
- 1.2. Internal integration working together with 50+
- 1.3. Subcultures and generation differences
- 1.4. Psychological contract

2. Motivation

- 2.1. Definition of motivation
- 2.2. Theories of motivation
 - 2.2.1. Content theories of motivation
 - 2.2.2. Process theories of motivation
- 2.3. Motivation of older adults

3. Leadership

- 3.1. Definition of leadership
- 3.2. Leadership styles
- 3.3. Leadership style for employees50+

4. Performance evaluation and rewarding system

- 4.1. Performance evaluation for older employees
- 4.2. Rewarding system for older employees

HTTP://WWW.IN50PLUS.COM

.





1. Organisational or corporate culture

- 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).
- It is unique for each organisation.
- It has been in focus of many researchers, theorists and practitioners.
- Attributes of organisational culture (Kreiten and Kinicki, 2013):
 - impact on employees' motivation, satisfaction and turnover,
 - · source of competitive advantage and
 - managerial influence.



HTTP://WW/W.IN50PLUS.COM

.









1.1 Functions of organisational culture

External adaptation - What has to be accomplished and how?

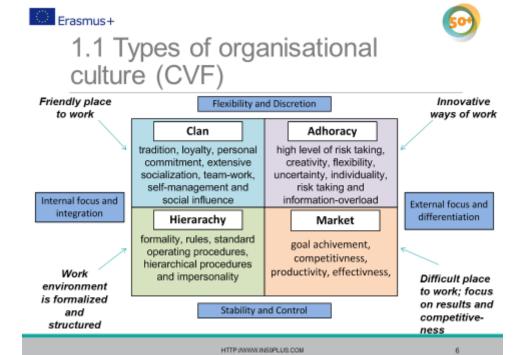
- ways of reaching goals, task to be accomplished, methods used to achieve the goals and methods of coping with success and failure;
- the way in which employees are presenting their organisation to the outsiders expressing their positive values;
- deals with crucial organisational aspects such as mission, strategy and goals followed by measurement and corrections.

Internal integration – How do members resolve problems associated with working together?

- establishment of a unique identity;
- · deciding who is member of the group and who is not;
- developing an informal understanding of acceptable and unacceptable behaviour and separating friends from enemies;
- · developing a shared identity and collective commitment.

(Schermerhorn et al., 2012)

HTTP://WWW.INSOPLUS.COM











1.3 Subcultures

 Subcultures are based on values shared by a group rather that by an organisation as a whole (Hitt et al., 2011, p. 469).



- Subcultures are formed within organisations because their members interact face to face more frequently with one another than with other people in the organisation.
- Presence of subculture can complicate the development and management of organisational culture.
- Strong subcultures are often found in task forces, teams and specialized project groups. (line employees, technical and professional people, top management).
- Subculture can be created as a result of some other aspects, such as: gender, race, generation, education, religion, family status or local similarities (Schemerhorn et al., 2012).

HTTP:////WW/JNSOPLUS.COM





1.3 Generation differences

- Generation differences can be crucial for creating different subcultures within an
 organisation due to many attributes that are characterised for each generation.
- In today's workplace 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 have different work habits, ethics and communication skills.
- Having different generations within organisation, especially distinguishing them
 through the level of using different aspect of technology it will cause
 organisation to create and offer different various trainings bridging the gap
 between these groups of employees.
- The results of study researched by Moss and Martins (2014) indicate that there
 are significant differences in the way generations view certain dimensions of
 organisational culture, characterising Generation X as more cynical and
 Generation Y as more positive, optimistic or even somewhat idealistic about the
 world of work.

HTTP://www.in50PLUS.COM



Exercise 1. The culture quiz: How high does your company score? (15 min) (available at: https://medium.com/the-mission/the-culture-quiz-how-high-does-your-company-score-8bfb3af6c146)

Please cross the answers that fits most to you.

1. Are you recruiting processes thorough, friendly and efficient?

- a) We'll hire any Joe Schmoe who walks through the door.
- b) We try to do our due diligence, but sometimes you've gotta hire best from what you've seen.
- c) We're all about people! Hiring is a serious business so we take special care to find people who are aligned with our company values.

2. How would you characterize your onboarding processes?

- a) You mean like at the airport? I'm usually in economy...
- b) We train people for their roles an then throw them to the wolves.
- c) We go deep! Our onboarding sessions are designed to educate employees on who we are, what we do, and how they fit in.

3. Do you communicate your vision, values and goals effectively?

- a) I don't know what our vision, values or goals are.
- b) I think most people understand what we're doing here.
- c) We shout our vision, values and goals from the rooftops! Better yet, we follow through. Our employees understand exactly what we stand for and what we aim to achieve.

4. Do employees understand how they contribute individually to your company goals?

- a) As long as they're making money, who cares?
- b) If they got the job, they must've read the job description. Isn't that enough?
- c) We could never reach our goals without every single one of our employee's contributions and we make sure they know it.

5. Does your company offer learning and development opportunities?

- a) Heck no. Do that on your own time.
- b) If your employees want to take a course here and there, we'll support it.
- c) You bet in-house, out of house, we encourage and support our employees' growth both professionally and personally.

6. How do you manage your people?

- a) The underlings can't be trusted to do things on their own.
- b) We try to leave people alone to do their jobs, but we usually step in the check their work
- c) We believe in situational leadership. Our employees are skilled and we trust them to manage themselves but we're always here to help if they need it.

7. How does your leadership team resolve conflict?

- a) Conflict? Eek! Run away!
- b) Oh boy, not again. Resolving conflict is a necessary-evil.
- c) Who said conflict had to be a bad thing? Take those bad boys as opportunities to learn and tackle them head-on!





8. Do you offer fair compensation?

- a) What's minimum wage? Yeah, that sounds right.
- b) We try to be competitive, but we aren't afraid to low-ball.
- c) It's all about the benefits, baby. We offer competitive salaries, flexible benefits, and profit sharing opportunities.

9. Do you invest in team building events?

- a) Our motto is all work, no play.
- b) Does the annual Christmas party count?
- c) Our parties are bomb! We have regular team events, both in and out offices.

10. Do people tend to stay with the company for a long time?

- a) I don't even bother learning people's name anymore.
- b) Usually they'll stick it out for a year or two, but then most people move on.
- c) Once people join our family, it's hard to say goodbye. Many of our employees have been with us for 3-10 years

11. Does your company support work-life balance?

- a) Work should be your life.
- b) We recognise that people have their own lives, but work comes first.
- c) We don't think of it as work versus life it's all life, and balance is an absolute non-negotiable for us. Extended vacations and flexible schedules are well-deserved around here.

12. How would you describe the energy in your office?

- a) Dull we're all just here for the pay cheque.
- b) Focused we have a goal and work hard to meet it.
- c) Collaborative we share in our passion to smash our goals and we're stoked to work hard as a team!

Now, find your score! Count your amount of crossed a _____, b ____ and c ____.

If you got mostly a's:

Your company is suffering from a total lack of healthy culture.

From micro-managing to overworking to a lack of company focus – it's no wonder employees are bowing out before they're completed their probationary period. To turn your company around, you need to invest more time into your employees development and wellbeing. In turn, they'll be more willing to put in the work for you.

If you got mostly b's:

Your culture is strong enough to keep employees satisfied – but it isn't likely to keep them on board for the long haul.

While your goals are clear and you try to create opportunities for your staff, the support is only there when your employees ask for it. You're doing better than a lot of companies out there, but you could use a few tweaks to set yourself apart.

If you got mostly c's:

Your culture is the gold standard for companies everywhere.

You're clear about who you are as a business and refuse to compromise on your values, goals and vision. You pump people up to come to work ready to excel. You invest in your company culture (in and outside of work) – and as a result, your employees are excited to achieve your goals as a team.







Questions for discussion:

 Compare and discuss your score to other participant's score. Are you satisfied/surprised with your score?









2. Motivation

- Motivation is defined as forces within the individual that account for the direction, level, and persistence of a person's effort expended at work.
 - Direction refers to an individual's choice when presented with a number of possible alternatives (e.g., whether to pursue quality, quantity, or both in one's work).
 - Level refers to the amount of effort a person puts forth (e.g., to put forth a lot or very little).
 - Persistence refers to the length of time a person sticks with a given action (e.g., to keep trying or to give up when something proves difficult to attain) (Schermerhorn et al., 2012).
- Several theories offer explanations of motivation. Most of them can be separated into two groups: content theories and process theories.
- Important content theories are: Hierarchy of Needs Theory, Acquired Needs Theory, and Two-Factor Theory.
- Important process theories are: Expectancy theory, Equity theory and Goal-setting theory.

HTTP://www.insoPLUS.com

4





Hierarchy of Needs Theory

by Abraham Maslow

- · One of the most popular motivation theories.
- According to Maslow, people are motivated by their desire to satisfy specific needs.
- In general, lower-level needs must be substantially met before higher-level needs become important.



HTTP://www.insoPLUS.com





Two-Factor Theory



by Frederick Herzberg



This theory suggests that satisfaction and dissatisfaction are not opposite ends of the same continuum but are independent states. In other words, the opposite of high job satisfaction is not high job dissatisfaction; rather, it is low job satisfaction. Likewise, the opposite of high dissatisfaction is low dissatisfaction. It follows that the job factors leading to satisfaction are different from those leading to dissatisfaction, and vice versa.

Two Factor Theory (Herzberg)



HTTP://WWW.INSOPLUS.COM

113





Expectancy theory

by Victor Vroom

Motivation to work depends on the relationships between the three expectancy factors.

Expectancy Perceived probability that effort will lead to good performance X Instrumentality Belief that there is a connection between activity and goal. X Valence Degree to which rewards are valued

Motivation Reason to perform

HTTP://WWW.INSOPLUS.COM

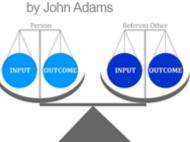






Equity Theory

- Individuals are motivated by fairness, and if they identify inequities in the input or output ratios of themselves and their referent group, they will seek to adjust their input to reach their perceived equity.
- An individual who perceives that she or he is being treated unfairly in comparison to others will be motivated to act in ways that reduce the perceived inequity by:



- · changing their work inputs by putting less effort into their jobs;
- · changing the rewards received by asking for better treatment;
- · changing the comparison points to make things seem better;
- changing the situation by leaving the job (Schermerhorn et al., 2012).

HTTP://WWW.INSOPLUS.COM

- 1





Goal-Setting Theory

- 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.



Goal Setting

Specific
Fleasurable
Ottainable
Belevant

Time-bound

HTTP://WWW.INSOPLUS.COM





Exercise 2. Motivation of adults50+ (15 min)

According to the presented theories of motivation and your knowledge and experience: Define motivational factors that could be relevant for employees50+ and future empoyees50+.





3.1 Leadership

- 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 (its followers) to contribute toward the effectiveness and success of the organisations of which they are members.
- 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 of subordinates in an effort to reach organisation goals (Omolayo, 2007).
- Leadership is the process of inspiring others to work hard to accomplish important tasks (Schermerhorn, 2008).

HTTP://WWW.INSOPLUS.COM









3.1 Leadership

There are four commonalities among the definitions of leadership:

- Leadership is a process between a leader and followers;
- Leadership involves social influence;
- Leadership occurs at multiple level in an organisation (leadership involves mentoring, coaching, inspiring and motivating at individual level; leaders build teams, generate cohesion and resolve conflicts at a group level; and finally leaders build culture and generate change at the organisational level);
- Leadership focuses on goal accomplishment.

(Northouse, 2007)

HTTP://www.insoPLUS.com

11





3.2 Leadership styles

- Leadership style is the manner and approach of providing direction, implementing plans, and motivating people.
- The style that individuals use will be based on a combination of their beliefs, values and preferences, as well as the organisational culture and norms which will encourage some styles and discourage others.
- So it could be stated that there are as many leadership styles as there are leaders.

HTTP://WWW.INSOPLUS.COM









3.2 Lewin's leadership style



HTTP://www.insoPLUS.com

21

3.2 The Blake Mouton Managerial Grid High Country Club Team Management Management Middle-of-the-Road Management Low Concern for Results High

HTTP://www.inSoPLUS.com







3.2 Likert's leadership style

EXPLOITATIVE AUTHORITATIVE	BENEVOLENT AUTHORITATIVE
It is based on one way communication. Decision making is centralised. Based on threat and fear.	There is one way communication. It is based on rewards. The decision making is centralised
CONSULTATIVE LEADERSHIP	PARTICIPATE LEADERSHIP
 There is two way communication but upwards communication is limited. It is based on appropriate rewards The decision making is limited and decentralised. 	This style of leadership is based on group participation. There is two way communication The decision making is decentralised.





3.2 Transactional VS – formational Leadership

Transactional Vs Transformational Leadership

Transactional Leadership	Transformational Leadership		
Leaders are aware of the link between the effort and reward	Leaders arouse emotions in their followers which motivates them to act beyond the framework of what may be described as exchange relations		
Leadership is responsive and its basic orientation is dealing with present issues	Leadership is proactive and forms new expectations in followers		
Leaders rely on standard forms of inducement, reward, punishment and sanction to control followers	Leaders are distinguished by their capacity to inspire and provide individualized consideration, intellectual stimulation and idealized influence to their followers		
Leaders motivate followers by setting goals and promising rewards for desired performance.	Leaders create learning opportunities for their followers motivate and stimulate followers to solve problems		
Leadership depends on the leader's power to reinforce subordinates for their successful completion of the bargain	Leaders possess good visioning, rhetorical and management skills, to develop strong emotional bonds with followers		
Leaders often use technical knowledge to determine the change process	Leaders search for adaptive solutions to engage hearts and minds in the change process		

Online course

HTTP://www.insoplus.com









3.2 Leadership style for employees50+

Employees'50+ characteristics should be observed

in the process of choosing an appropriate leadership style (Yu & Miller, 2005):

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

HTTP://www.in50PLUS.COM

25

Exercise 3. Discussion (18 min)

- 1. Describe an appropriate leadership style for employees50+ that is based on individual work characteristics.
- 2. Is there any connection between motivational factors and leadership style for employees50+?
- 3. Should motivational factors be included in the choice of leadership style and in which way?







4.1 Performance evaluation for employees50+

- An employer has to estimate whether it is more advantageous to adjust the performance system or whether the employee should adapt (Bird, 2014).
- Older workers should receive fair performance measurement standards; performance objectives for older employees cannot be applied always under the same circumstances and can be influenced by an employee's age.
- Older workers are as motivated as younger workers; are more consciously engaged in performance; should have the same opportunities to contribute to goal achievement; should have access to training; possibility of aged-mixed working teams (Vasconcelos, 2015; Zwick et al., 2013).

HTTP://WWW.INSOPLUS.COM

22





4.2 Rewarding system for employees50+

- A reward is perceived as a desirable incentive by the recipient, and is obtained in consequence of an action. In order to perceive an incentive as positive, the reward must fulfill a recipient's need.
- As each employee has different needs, there is no general desirable reward for all employees.
- 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.

Exercise 4. Discussion

What compensations would you include in Cafeteria benefits plan for employees50+?

HTTP://WWW.INSOPLUS.COM





Exercise 4. Discussion (7 min)

What compensations would you include in Cafeteria benefits plan for employees50+?





Summary

- 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.

HTTP://WWW.INSOPLUS.COM





Module 4: Case Study 3 Optimal encouragement for 50+ on the workplace (15min)

	Online co
Name	Mister Muster
Birthdate	xx.xx.1955
Residence	Hessen (western German state)
Highest	Apprenticeship as a skilled technical toolmaker
graduation	With continuous master qualification
Family status	Married, no children
Description	Mr. Muster finished secondary school and did an apprenticeship close to his hometown. After the apprenticeship, he worked for five years as a skilled technical toolmaker. Then, he began an extra-occupational apprenticeship for a master in the same profession. He graduated with very good results. Since the beginning of his apprenticeship in 1970, he is continuously employed in the same company. Since 1985 until today he is head of the tool construction.
	The employer and the managers appreciate a lot his technical expertise. Despite this, he is having growing difficulties in interacting and dealing with apprentices and younger skilled workers / colleagues in an age-friendly way. His leadership style is more and more directive (definitive). The fluctuation figures in his department are increasing, which is an aggravating problem due to the shortage of skilled workers. He is not open for consultations with regard to this issue. Instead he refers to the good key performance indicators in his department.
	The area director had several unsuccessful consultations with him the last year. As there was not found a satisfying solution, the HR area was asked to find an appropriate solution for all participants.
Problem definition	Open problem: Which ways of solution do you consider as reasonable?









Case Study 3 Optimal encouragement for 50+ on the workplace			





Module 4: Case Study 4 Age friendly performance improvement (15min)

Name	Miss Anna Nowak	
Birth date and place / age	May 22, 1961 in Katowice	
Residence	Katowice, voivodship city Silesia Region	
Highest educational qualification	Finance and Accounting Master degree, University of Economics, obtained in parallel to the full time work	
Family status	married, her husband already retired, 2 adult children living on their own	
Description of situation	Anna started her professional career as an Accountant at the age of 19 straight after she graduated from high school. Since that time she has always been assigned to Accounting, Finance and Controlling related tasks which she found both interesting and securing stability of her career.	
	The Company itself has transformed significantly over the last 35 years, and turned from a Government stated company to a 100% private equity. Over the last decades the Company implemented several reorganization initiatives, including group redundancies and other headcount optimisation initiatives. Due to her engagement and dedication, Anna has always been a strong performer to guarantee a stable future growth of the company.	
	Within the variety of different change management initiatives over the last 5 years it has become obvious that Anna needs to adapt better to the new reality where English language fluency is a must. The new projects require flexibility, acceptance of complex tasks, ability to work in multicultural environment, and responding to Internal Customer requests promptly to demonstrate professional expertise.	
	Anna does not feel comfortable now to take these new challenges. She particularly misses proactiveness to meet the demands of Internal Customers. They give a negative feedback on Anna's performance to line managers complaining on both the quality and on time delivery of her service.	
Problem definition	The line manager of Anna wants to unlock her potential and performance so that she refocuses on goals and contributes more to the new projects.	
	Anna wants to remain in her current role until she gets retired and to get higher salary due to the years of experience to the company.	







Case Study 4 Age-friendly performance improvement				



MODULE Knowledge and Information Management



Learner's workbook: InCounselling 50+

Name of Module			Workload	Handbook	Trainer Guide
5. Knowledge Management	and	Information	120 min	p. 88	p. 47

Learning Objectives

At the end of this course, you are able to apply appropriate methods for securing knowledge and providing information with the use of technology under consideration of the target groups' characteristics (employees50+, employees in transition, unemployed50+) regulation.

You are going to learn about:

- 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).
- To prepare employees 50+ / unemployed 50+ to acquire independently and effectively, manage and share information, especially for processes at work and during job search.
- To explain beneficial and obstructive criteria of proactive knowledge management and information transfer.
- To valuate criteria of a good knowledge management in an ageing-friendly organisation.
- To apply different tools in favour of effective information management and information transfer in practice.
- To show older adults how to transfer information in an useful way for others' professional action and learning.

Keywords of this Module:

Information, knowledge, knowledge management, locating knowledge, acquiring, creating, developing, transferring knowledge, use of knowledge, securement of knowledge, knowledge, preservation of knowledge, lifelong learning, learning strategies.





Introductory exercise

Exercise 1a. Brainstorming (5 min)

Please answer the two questions below.

What does knowledge mean to vou?
What does knowledge mean to you?
Which crucial elements does knowledge management cover or should cover?









Overview

- The importance of knowledge in an organisation
- Knowledge management in an organisation
 - 2.1 Strategies, methods and processes for securing knowledge
 - 2.2 Selected steps of the knowledge management process
- 3. Locating knowledge within an organisation
- Acquiring, creating, developing and transferring knowledge
- The use of knowledge in an organisation
- Using technology for enabling a sustainable securement of knowledge
- Preservation of knowledge in an organisation
 - 7.1 How to store and secure information and knowledge?
 - 7.2 How to organise a functioning alumni community?

HTTP://WWW.IN50PLUS.COM

- 1





1. The importance of knowledge in an organisation

Knowledge is an important determinant of changes, which take place in the labour market.

Competitive advantage of business companies is built on the basis of employees' knowledge. A company with extensive knowledge, skills and competences wins the competition contest.

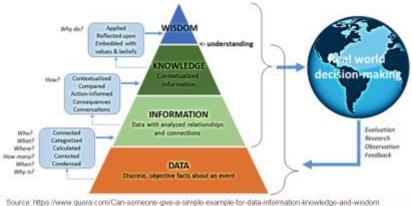
- Knowledge is a significant component of an individual's vocational functioning, besides skills and competences
- The demand for highly qualified employees with a certain knowledge level has been systematically growing.
- Particularly for employees who are willed to improve their qualifications, move to other economy sectors and react flexible to changes.

HTTP://WWW.IN50PLUS.COM









HTTP://WWW.INSOPLUS.COM

7



HTTP://WWW.INSOPLUS.COM









1. The importance of knowledge in an organisation

- For planning the process of knowledge management and implementing it, there are also the divisions of:
 - explicit knowledge and
 - tacit knowledge (Kowalczyk, Nogalski, 2007).



HTTP://WWW.IN50PLUS.COM

9





2.1. Knowledge management in organization

Strategies, methods and processes for securing knowledge of employees

Knowledge management is associated with:

- organizational learning,
- transforming of individual knowledge into collective. (Zając, 2014).

It is essential to develop:

- appropriate techniques facilitating the processes related to acquisition, transmission, transfer, and search for organizational knowledge,
- the potential of each individual staff member employed by an organization – including classified knowledge.

HTTP://WWW.IN50PLUS.COM







2.1 Strategies, methods and processes for securing knowledge

Knowledge management serves to realize a strategy that has been agreed by the organisation. However, it is possible to indicate that organisations generally seek to:

- make use of the internal knowledge resources,
- hunt for and absorb external knowledge resources,
- create convenient conditions, to which all participants of the decision process feel obliged. Then, they create knowledge and share their possessed knowledge resources.

(Kisielnicki 2004)

HTTP://WWW.IN50PLUS.COM

12



2.2 Selected steps of knowledge management processes

Step 1:

Identification and location of knowledge within an organisation

Step 2:

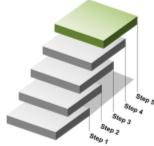
Acquiring, creating, developing and transferring knowledge in an organisation

Step 3:

The use of knowledge in the organisation

Important question:

How to disseminate information or knowledge and to ensure its frequent use inside the company?



HTTP://WWW.IN50PLUS.COM







2.2 Selected steps of knowledge management processes

Step 4:

Using technology for enabling a sustainable knowledge securement

- Important questions:
 - How to connect 50+ with digital platforms?
 - How to motivate 50+ in general and towards IT change, work attitudes?
- Step 5:

Preservation of knowledge in an organisation

- Important questions:
 - How to store and secure information and knowledge?
 - How to organize a functioning alumni community?



14

2. Knowledge management in organisation

Exercise 1b. (10 min)

 Discuss the results in exercise 1a. under consideration of the content.









3. Locating knowledge within an organisation

From an employee's point of view, it is important to identify the existing knowledge assets within a company.

The objective of knowledge identification is (Jędrych, 2016; Zhunge 2006, pp. 571-592):

- location of knowledge and know-how fields possessed by different groups of employees, including employees50+;
- determining existing and important knowledge resources that should be preserved in the organisation;
- identifying gaps between knowledge resources and organisational needs with respect to determine steps to fill the gaps;
- identifying effective ways of knowledge transfer for the organisation.

HTTP://WWW.IN50PLUS.COM

10

3. Locating knowledge within an organisation

Exercise 2. Group work (10 min)

Which tools do you organization?	use or do you recommend	d to use for locating knowl	edge in your







3. Locating knowledge within an organisation

Tools to identify internal knowledge sources including knowledge of employees50+ (see Jędrych, 2016):

- analysis of employees' individual skills,
- a list of data about internal experts, which facilitates locating specialist knowledge,
- knowledge mappings,
- maps of information resources, and
- knowledge matrixes.

HTTP://WW/W.IN50PLUS.COM

11





3. Locating knowledge within an organisation

Organisational knowledge is stored in networks and relations, in unwritten behavioural rules and in common values.

Therefore, it is necessary to locate available sources of collective knowledge, using:

- matrixes of competence,
- previous experience of employees and teams acquired in the course of introducing organisational changes,
- network analysis,
- organisation knowledge maps, which make it possible to pinpoint sources of key resources of knowledge.

HTTP://WWW.IN50PLUS.COM







4. Acquiring, creating, developing and transferring knowledge

Acquiring and developing knowledge is possible through a number of different formal and informal methods: (Klaus & Nowak, 2013, p. 875).

Formal methods include, e.g:

- Training sessions,
- Workshops,
- Briefing,
- E-learning.

Informal methods include:

- Learning through experience
- Discussion, exchange of opinions, thematic portals
- Mentoring
- Coaching

HTTP://WWW.IN50PLUS.COM

2



4. Acquiring, creating, developing and transferring knowledge

Due to experience and practical knowledge, employees50+ can play a significant role in the process of creating knowledge.

They can perform important functions, e.g. as:

- An in-house consultant,
- An expert,
- A benchmark prospector.

HTTP://WWW.IN50PLUS.COM







4. Acquiring, creating, developing and transferring knowledge

- Other important processes of knowledge management are the transfer and diffusion of knowledge.
- The purpose of knowledge transfer is to address an organisation's knowledge demands.
- It is not about providing the entire knowledge to all employees, but about selecting employees to ensure an efficient functioning of the organisation.
- This selection can prevent information overload.

HTTP://WWW.IN50PLUS.COM

22



4. Acquiring, creating, developing and transferring knowledge

HR managers and specialists play an important role to select knowledge. They monitor and demand specific knowledge in different employee groups, and provide possible transfer ways and development opportunities. This can involve, e.g.:

 "expert groups", "Oxford-style debates", thematic conferences, informal meetings.

Employees50+ can play a special role in the process of knowledge transfer and diffusion, as:

- Mentors or in-house teachers
- Distributors (Diffusers).

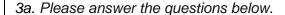
HTTP://WWW.IN50PLUS.COM





4. Acquiring, creating, developing and transferring knowledge

Exercise 3. Group work (10 min)



- Which role does employees50+ play in an organisation to support knowledge transfer?
- o How can they be encouraged to share knowledge?
- What are methods and tools that make it easier for employees50+ to transfer knowledge and ensure ist frequent use?

3b. Discussion

 How do you/would you disseminate information or knowledge inside the company ensuring its frequent use?









5. The use of knowledge in the organisation

- One important element of knowledge management is its effective use.
- It serves to address the needs and purposes of an organisation.
- It is necessary to demonstrate a kind of wisdom for knowledge use, which is a typical characteristic of employees50+.
- Then, employees50+ can play specific roles in the organisation, e.g.:
 - a human repository,
 - a referee / juror.

HTTP://WWW.IN50PLUS.COM

- 2





5. The use of knowledge in the organisation

To use adequately the knowledge of employees50+ in an organisation, the following conditions must be satisfied (D. Jemielniak, A. K. Koźmiński 2012):

- Social and cultural,
- · Institutional and legal,
- Economic,
- Technological and informational conditions.



HTTP://WWW.IN50PLUS.COM

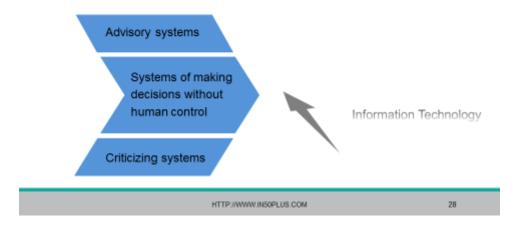






6. Using technology to enable a sustainable knowledge securement

Information technologies (IT) can support dissemination and usage processes of knowledge in the organisation. Expert systems can be of help here:



4. Acquiring, creating, developing and transferring knowledge in an organisation

Exercise 4 (20 min)

4a.Single Work

Let's talk about your experience.

- What experiences do you have in technology tool implementation considering especially employees50+?
- What can be obstacles or problems that are associated with such implementations?
- How did you encourage individuals50+ to use new technologies?



4b. Discussion
Bring together the results.







7. Preservation of knowledge in an organisation

Preservation of knowledge should include three basic processes (Jędrych, 2016):

- Selection of knowledge which is worth preserving.
- Updating data. The purpose of this stage is providing the company with access to current, continuously verified and supplemented data, providing basis for making good decisions.
- Storing of knowledge. Knowledge is stored in archives. In an organisation the
 role is played by people, teams and computers. The most important places to
 store knowledge are and will be employees. A good way is, preparing
 successors of the current experts, e.g. through mentoring.

HTTP://WWW.IN50PLUS.COM

31





7.1 How to store and secure information and knowledge

Information storage and securing

- Databases (knowledge and information repositories), information resource maps and any other tools supported by information technologies can be used to secure knowledge.
- It is important to prepare the procedures of information protection, including:
 - Encryption of confidential documents etc.
 - Protection of the organisational intellectual property through patenting and licensing.

HTTP://WWW.IN50PLUS.COM









7.1 How to store and secure information and knowledge

Knowledge storage and securing

To collect, store and secure employee's knowledge is a bit complicated.

Therefore, it is useful to apply the codification and personalization strategy.

The company's goals should be:

- To cushion negative effects of employee departure, and to prevent the loss of organisational memory.
- To encourage knowledge exchange between employees, including organisational learning and learning from each other.
- Systematic employee interviews with particular attention on employees who plan to leave the company.



HTTP://WWW.IN50PLUS.COM

33





7.2 How to organise a functioning alumni community?

For an alumni community it is important to:

- Build up proper relations with former workers,
- Establish the so called alumni clubs and alumni community,
- · Give access to former workers to intranet and internet forums,
- Create a special intranet to sustain former workers in the community.

HTTP://WWW.IN50PLUS.COM









7.2 How to organise a functioning alumni community?



*Counsellor system – the workers who are about to retire can help the younger ones settle down in the company. Such system can be continued also during retirement – for certain benefits, such as money or medical care.

HTTP://WWW.IN50PLUS.COM





Module 5: Case Study 5 Optimal knowledge management 50+ (self study)

Name	Mr. ANTE ANTIĆ							
Birth date and place / age	60 years old, born in Zagreb							
Residence	Zagreb, Croatia							
Highest educational qualification	Master degree, Electrical engineer							
Family status	Married, 2 children							
Description of situation	Mr. Antić is an electrical engineer and has an advanced experience and knowledge in his area of expertise, for these reasons he has been highly appreciated inside the company for years. He is now 60 years old and plans to go to retirement once aged 65. Recently he has been appointed as mentor to a younger colleague Petar. Although he is devoted to his job, he doesn't find this particular task as part of his job description but as an extra "burden" especially in his age and is not that motivated to actively participate in the process. In addition, he started to feel a little bit threatened by a younger employee and thinks that he might take over his responsibilities even before he is retired. That demotivates him to share the information even more. HR is aware of this issue and besides motivating the mentor to share this knowledge they need to implement a sharing process that could be facilitated and evaluated properly as they want to keep this valuable knowledge inside the company.							
Problem definition	Mr. Antić has been appointed as mentor to a younger employee but has not demonstrated the willingness to participate in the process. How would you implement or promote the share process?							



Case Stud	dy 5	Optimal	knowledge	management -	- how	to	motivate	<i>50</i> +	for	knowled	ge

MODULE Introduction to Counselling 50+



Learner's workbook: InCounselling 50+

Name of Module	Workload Handbook		Trainer Guide	
6. Introduction to Counselling 50+	120-180 min	p. 114	p. 64	

Learning Objectives

At the end of this course, you are able to create a holistic and demand-oriented counselling process for people 50+.

You are going to learn about:

- Best- and worst-practice examples as well as criteria for positive and negative impact factors on counselling processes in practice.
- Most important counselling theories with regard to usability in practice.
- Crucial elements (e.g. contract negotiation) of a counselling process from a holistic point of view.
- Certain aspects of counselling consultations and processes.
- Individual-oriented consultations in scope of career and transition counselling along appropriate counselling theories taking into account client's personal experiences and needs.

Key words for this Module:

counsellor's skill, empathy, trustworthiness, openness, genuineness, shared responsibility, joint goals, emotional readiness, cognitive readiness, self-knowledge, occupational knowledge, decision-making skills, subjective perception, environment, organisational values, society reflection, awareness, self-care, evaluation









Overview

- 1. Introductory Exercise 1
- Counselling

Excursus: Counselling in HR (with Exercise 2)

- 3. The counsellor (with Exercise 3)
- 4. The counsellee
- Reflection in counselling
- Evaluation of counselling
- Exercise 4

HTTP://WWW.IN50PLUS.COM

1

I don't want to be here.

That's not my problem!



1. Introductory exercise

Exercise 1. Single work (10 min)

Exercise 1: Single work (10 min)	
What is counselling for you?	
What goals does it have?	





Brainstorm crucial elements and steps of counselling! GOAL: establish a common definition/understanding of counselling		
Bringing together the results.		









2. Counselling

- Counselling has to be
 - life-long, holistic, contextual and preventive
- Successful ageing:
- Intellectual stimulation + new skills acquisition
- Maintainance of active & independent lifestyle
- Meaningful contribution through activities, e.g. work, volunteering, etc.

Savickas et al., 2009 Kerz, Teufel & Dinman, 2013

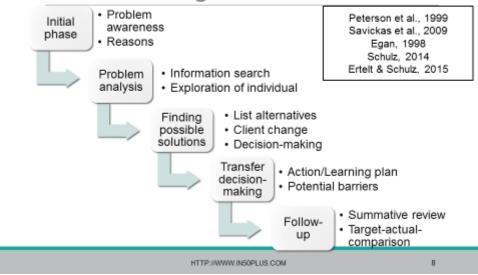
HTTP://WWW.IN50PLUS.COM

7





2. Counselling: Theories

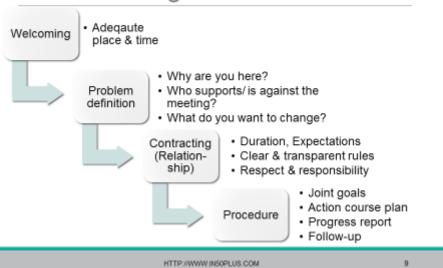








2. Counselling: Procedure







2. Excursus Counselling in HR

Exercise 2. Does counselling follow such a procedure in HR? (10 min)

- As a HR practitioner, counselling serves to align employee's and the enterprise's values and goals.
- As a counsellor do you do something similar? If not, would you do something similar?
- o Fill out the following table! (10 min)

		Employee's goals	Equivalent enterprise goals?	How to foster the goals?
1	١.			
2	2.			
3	3.			









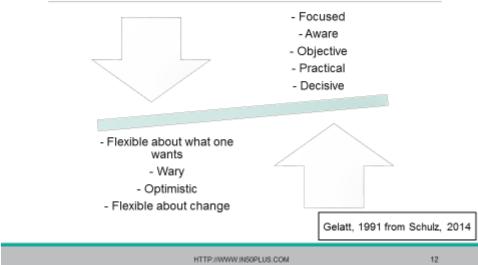
2. Counselling: Approaches

Solution orientation	Systemic approach	Resource orientation	Client centred		
Focus on present Own goal setting Solution is central Problems are s.th.	From family therapy Individual's social networks External provoking Individual change	Individual potential skills (PS) PS = hope, comp. Stress=PS lack/loss Client as expert	Foster self-image & ideal = development Adequate attitudes: Genuine, open,		
Counsellor motivates		☐ Identify & train PS ☐ Counselling establishes safety	☐ Unrestricted appreciation		
	Mosberger, Schneeweis & Steiner, 2012; Schlippe & Schweitzer, 2007; Beushausen, 2010; Egan 1998, Finke, 2004				
	HTTP://WW/W	UN50PLUS.COM	11		





2. Counselling: Paradox









2. Counselling: Interventions I

Standards

· Active listening, understanding and answering

Clarification

- Counter question
- · Paraphrasing = summary to keep track,
- · visualizing = draw, paint, make it visible in another way

Client's perspective change

- · Circular questions (provoking questions)
- · Role-play (tell the story with another narrator)

Feedback

· Improve self-appraisal

Knoll, 2008

HTTP://WWW.IN50PLUS.COM

13





2. Counselling: Interventions II

Evaluation of feelings

- · Scale questions (On a scale from 1 to 10, how do you evaluate ...)
- · Serves to demonstrate progress or improvement

Tricky problems

- Hypothetic questions (future-oriented imagination for solution processes, serves as an anchor)
- Miracle question (Imagine you wake up tomorrow and everything is fine. What would be different?)

Stalled situations

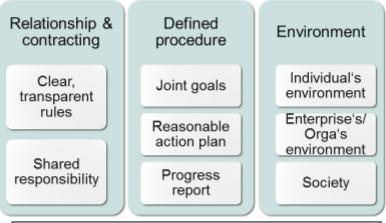
HTTP://WW/W.IN50PLUS.COM







2. Counselling: Summary



Berne, 1966; Egan, 1998; Peterson et al., 1999; Katsarov et al., 2014

HTTP://WWW.IN50PLUS.COM

15





3. The counsellee

- Reconsider employee's 50+ goals
- Older adults cognitions function differently
 - Because of another socialization process
 - Because of more and other experiences, e.g. ICT
 - Locus of control
- Cognitive control mechanisms

Artistico et al., 2003; Ng & Feldmann, 2008; FitzGerald et al., 2017

HTTP://WWW.IN50PLUS.COM







3. The counsellee

- Self-knowledge
 - About own education, competences, life goals & roles
 - Self-appraisal
- Occupational knowledge
 - Knowledge about job tasks
 - Knowledge about vocational future goals
- Decision-making skills
 - Aware of problem and causes
 - Information search
 - Consideration of alternatives
- Decision & Commitment
- Follow-up evaluation

Peterson et al., 1999

HTTP://WW/W.IN50PLUS.COM

17





3. The counsellee: Summary











4. The counsellor

· Project definition:

A counselling practitioner is 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 workplace changes, into another job, to joblessness or to retirement and guides the client to new activities or jobs including job matching and mediation.

HTTP://WWW.IN50PLUS.COM



Exercise 3. Imagine the perfect counselling / HR practitioner (10 min)

- a. Exercise for HR practitioners: Imagine the perfect counselling practitioner and describe him/her, his/her main characteristics, skills and attitudes!
- b. Exercise for counselling practitioners: Imagine the perfect counselling practitioner and describe him/her, his/her main characteristics, skills and attitudes!

Results of the group work.

Name, age,	Most important	Most used	Attitudes	Skills and
background	tasks / frequent	counselling		competences
	concerns &	methods &		
	requests	interventions		

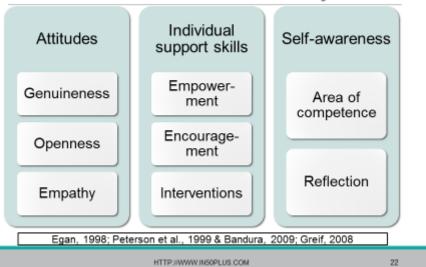








4. The counsellor: Summary







4. The counsellor

Keep in mind:

https://www.youtube.com/watch?v=ubNF9QNEQLA

- Perception is individual and subjective
- It is influenced by socialization, mother tongue, experiences, etc.
- · Counsellors as well as counsellees are individuals

HTTP://WWW.IN50PLUS.COM

Egan, 1998; Greif 2008











5. Reflection in Counselling

Theory of awareness (mirror experiment)

Group 1: Exam in front of a mirror

- · 7% cheating
- Highly self-centred answers
- Own behaviour less often harmful

Group 2: Exam without mirror

- · 71% cheating
- Low self-centred answers
- Values and action less coherent

Diener &. Wallboom, 1976, quoted from Greif, 2008

HTTP://WWW.IN50PLUS.COM

24





5. Reflection in Counselling

Raising awareness of 50+

Strong over- or underestimation of own self

optimistic

High confidence:

- Confrontation with negative aspects
- Expectation of critical feedback for improvement
- Low confidence:
- Avoidance of negative feedback
- -Lacking skills / resources for improvement
- Train coping skills

Bandura, 2009; Stajkovic & Luthans, 2002

HTTP://WWW.IN50PLUS.COM









Reflection in Counselling

Definition:

"[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)

- Example for outcome-oriented conscious reflection:
 - I visualize / make myself aware/conscious / bring to mind to ...
- Explain the get along better with my strengths and weaknesses / importance of the goal / to overcome obstacles easier ...
- Disadvantages of outcome-oriented reflection: prior criteria setting

Greif, 2008

HTTP://WW/W.IN50PLUS.COM

26





Reflection Interventions

Metacognitive strategies

· Mental imagination of the step-by-step solution

Formulate principles

· "No generalizing personal critics"

Client's perspective change

Circular questions (provoking questions)

Feedback

- · Prompt, frequent, constructive, accurate
- · According with set goals

For more objectivity

. Interrogatives: What?, Where?, When?, Who?, Why?

Being optimistic

- · Relaxation exercises in stressful situations
- Emphasizing the positive after pessimistic sensations

Greif, 2008 & Kuhl, 2001

27

Online course

Possible reflection questions of the topic individuals50+ are attached in appendix A.

HTTP://WWW.IN50PLUS.COM









6. Evaluation of counselling

(Subjectively perceived) counselling quality depends on

- Own goal-setting
- Individual effort-taking and performance
- With appropriate support and
- Goal achievement
- subjective success

HTTP://WWW.IN50PLUS.COM

21





6. Evaluation of counselling

(Subjectively perceived) counselling quality depends on

- Own goal-setting
- Individual effort-taking and performance
- With appropriate support and
- Goal achievement
- subjective success

HTTP://WWW.IN50PLUS.COM









Summary

- Counselling as a theory
- In practice counselling often is not theoretically based
- Counselling practice is useful without theory
- Specific interventions and approaches to progress in consultations
- · Counsellor and counsellees underlie framework conditions
- Every individual has a singular perception
- Regular reflection and evaluation are necessary to avoid misunderstandings or misinterpretations

HTTP://WWW.IN50PLUS.COM



Exercise 4. Group work of 3 participants (18 min)

Please select one of the following Case Studies/Critical Incident.

Get together with your group. You carry out a role play three times. So that, each of you had all roles. For the roles, please use the role cards you find after the cases.

You are going to discuss the results in the plenum afterwards.

Module 6: Case Study 6 Adaption of work conditions

Name	Mister Beck
Birth date and place / age	June 1963 in Ludwigshafen
Residence	Small town in Odenwald (a rural area near Mannheim)
Highest educational qualification	Public service professional for mail, office administrator
Family status	divorced, 2 children
Description of situation	He is divorced and lives alone in a small town in a rural area near Mannheim (Odenwald). He has a car and a driver's license. He made an apprenticeship as a public service professional at the German Mail (Deutsche Post). Afterwards, he worked for 21 years in this occupation. Then, he went freelance as an insurance agent, which was unsuccessful. In his private life, he got divorced. Hereafter, Mr. Beck took an employment with contribution payments for three years; he was a commercial driver for Bofrost (a frozen food deliverer). Due to three herniated discs, he had to finish this employment. From 2005 – 2007 he received participation benefits (payments for inability to work) and reeducated to an office administrator. He worked 8 months in warehouse logistics and, then, got unemployed. Because he was required to pay child support and suffered from recurring unemployment, he stated financial distress. This is why he sought for help from debt counselling. The procedure for declaring personal bankruptcy finishes in February 2018. In the years 2013 / 2014 he was employed as "man of all work" in a surveyor's office. Since November 2013, he is a stand-in driver for the same employer to transport disabled people. In this employment, he cannot extend his work time. Mr. Beck is very musically, he plays various instruments and is active in clubs.
Problem	Mr Beck wants to extend his work time.
definition	He strives to contribute higher payments for his retirement / make more savings.





Module 6: Case Study 7 Age friendly recruitment

Name	Miss Hoffmann
Birth date and place / age	April 1965 in Frankfurt
Residence	Municipal in the German area Kraichgau
Highest educational qualification	Apprenticeship as a nursing auxiliary
Family status	Divorced, one daughter (14 years)
Description of situation	Miss Hoffmann lives together with her daughter in a small town in the German area Kraichgau. She has a qualification in secondary modern school, and finished an one-year apprenticeship as nursing auxiliary in 1994. She has a driver's license and a car. After her apprenticeship she worked as a nursing auxiliary in an old people's home from 1994 until 2004. Recently, she work part time to be able to care for her daughter. The employer fired her, and was the reason why she brought charges against the employer. They come to a compromise. Ms. Hoffmann reported mobbing and strong psychological pressure. In May 2016 she was integrated in a placement service for long-term unemployment. Her bad teeth was a decisive obstacle for the placement. Her extreme fear for dentists was a hindering condition. After a long search, a dentist could have been found that helped her to repair her teeth step by step. The healing process slowed down because of further complications. In the meantime, it was not possible to place her into a job. Then, she received a transitional prosthesis. In continuation, the placement effort was interrupted again, as she suffered from a thrombosis for several weeks.
	At the same time, she reported that her daughter had problems at school. Such problems were so aggravating that she was forced to cancel counselling consultations. Then the daughter changed the school. Through an internal canvasser, Ms Hoffmann got an interview at a regional, mobile nursing ward. She assisted the interview. However, the employer told the placement service not to be able to employ here, because she wouldn't be able to work the following four weeks due to her daughter's problems. The placement service's
	counsellor invited her for clarification.
Problem definition	Open problem



Module 6: Case Study 8 Age and culture friendly recruitment

Name	Mister Khamisi
Birth date and place / age	February 1966 in Addis Abeba, Ethopia
Residence	A village close to Heidelberg
Highest educational qualification	University program of economics
Family status	single
Description of situation	In 1987, Herr Khamisi came as a refugee from Ethopia to Germany. His German language skills are good, although he has an accent. Due to own statements his written German is very good.
	From 1992 until 2002 he studied and graduated in economics at the university Heidelberg. Since then he is jobless. He had a short-time employment for one month as a receptionist at the university hospital. In 2008 and 2009 he did further qualifications for an Application-Engineer-Manager. This was financed by the Public Employment Agency and took 9 months. However, the qualification remained without integration in the labour market. He wanted to continue the education for a SAP Application Manager. Therefore, several activation methods and application coachings were applied. Mr Khamisi did not claim any health limitations. He does not have a driver's license and takes public transport.
	In 2016, he applied in scope of a local, social project. At this moment, the only vacancy for him was a facility manager in a school. He did a two-week internship there. Even though, after the internship the employer evaluated Mr Khamisi's techniques and mechanics as totally untalented. He was interested in an alternative job as a warehouseman in the IT-Re-Marketing apartment. The job would be in a small company in his hometown.
	The placement officer went through his application during a consultation. The employer is contacted via a business agent. The agent will receive additional information about support and funding opportunities for long-term unemployed persons. Mr. Khamisi strictly refuses to have his current competences tracked by the vocational psychological service. Instead, he refers to his university graduation.
Problem definition	Open problem



Module 6: Case Study 9 Preretirement processes

Name	Mister Becker
Birth date and place / age	August 1958 in Straßbourg, France
Residence	A small town in Switzerland
Highest educational qualification	Technician for machine tools
Family status	Married, two children
Description of situation	Mr. Becker is applied as a technician for machine tools in a small enterprise in a suburban area. He made the apprenticeship in the same company, and is now employed for 40 years in this company. Over his career he gained a lot of experiences, and is now a key resource in his team. He is a reliable and liable employee.
	Young colleagues and the digitalization give him a feeling of insecurity and obsolescence. He likes his work and is appreciated by all colleagues. However, he feels not being able to take all tasks any more, and not being able to compete with younger colleagues. Moreover, he noticed recently that he would wish for an adaption of his working conditions, but he haven't told anybody about that.
	This is why he thinks about retiring sooner than intended. He has a pension fund and a lifetime working time account, which allows him to retire in the next 6 months.
Problem definition	Open problem
Suggested problem definitions	Which arguments do you use to convince Mr. Becker to stay longer? Which arguments would you use to convince your head of company to establish age-friendly working conditions (including transition into retirement)?
	retirement)? (How) Would you secure his know-how and expertise?





Role Cards

	Experience counsellor	as a	Experience counsellee	as a	Experience observer	as	an
The counsellor							
The counsellee's - Readiness - Realistic self- appraisal - Engageing							
The counselling - Shared responsibility - Common problem definition and action course plan							
Individual and Organisational environment was considered appropriately							





Present your case and conclusions in the plenum! (30 min)

Space for notes	



MODULE Peer Counselling



Learner's workbook: InCounselling 50+

Name of Module	Workload	Handbook	Trainer Guide
7. Peer Counselling	120 min	p. 140	p. 78

Learning Objectives

At the end of this course, you are able to improve own counselling activities through peer learning or peer counselling

You are going to learn about:

- The own counselling skills and attitudes in individual-oriented career counselling with regard to the target group.
- To evaluate constructively one's own and other's counselling performance.
- Concrete methods and techniques how to improve counselling consultations and related processes at work.

Key words for this Module:

Peer learning, peer counselling, reflection, evaluation, constructive feedback, counselling performance, counselling methods, counselling techniques, improvement, individual-oriented, career counselling

The peer counselling section is going to be part of the third follow-up day in eight weeks. To participate properly in the peer counselling procedure, please prepare your action plan as well as your own case or challenge you face currently:





1. Action Plan (30 min)

	Definition	Why is it important?	Concrete action/ behaviour	When is the goal achieved?
Goal 1				
Goal 2				
Goal 3				



2. Discussion of the action plan

a)	Obstacles and challenges of action plan
u)	Obstacles and challenges of action plan
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?
b)	What benefits do you face with your objectives and planned actions?









3. Procedure Peer Counselling

- Peer learning
- Intrinsic motivation
- Self-regulatory learning
- Requires profound knowledge and expertise
- Among different colleagues or practitioners with the same or similar activity field



HTTP://WWW.IN50PLUS.COM

7





3. Procedure Peer Counselling

- All participants present a case / problem
- 2. Selection of the most urgent problem
- Detailed presentation of the selected case and definition of the problem
- Round of questions for clarification
- Round of association for possible solutions
- Comments (from the person who receives advice)
- Round of solution presentation
- 8. Final comments and appreciation for contribution

Hendriksen, 2002, p. 25; Fellinger, 2011, p.2f.

HTTP://WWW.IN50PLUS.COM









4. Case template

Name	Mister Thomas Beck
Birth date and place / age	June 06 th 1963 in Ludwigshafen
Residence	Small town in Odenwald (a rural area near Mannheim)
Highest educational qualification	Public service professional for mail, office administrator
Family status	divorced, 2 children
Problem definition	Open or closed
Description of situation	

HTTP://WW/W.IN50PLUS.COM

- 1





3. To-Do

Please prepare a real-life case for the next session (the follow-up day). The previous case template serves as an illustration.

Make sure to anonymise any kind of sensitive data

Name	
Birth date and place / age	
Residence	
Highest educational qualification	
Family status	
Description of situation	
Problem	
definition	





Learner's workbook: InCounselling 50+

Name of Module	Workload	Handbook	Trainer Guide
Follow-up day Peer Counselling	300 min	p. 140	p. 82





Overview

- Recap action plan
- 2. Report of action plan
- 3. Agreement of shared values
- Preparation
- Peer counselling round 1
- 6. Peer counselling round 2
- 360° feedback
- Contact

HTTP://WWW.IN50PLUS.COM







2. Comments regarding the action plan from Day 2.

What went well?	
What went not so well?	
What would you like to improve?	



Peer Counselling



What would you suggest those who enter the training?





3. Agreement of shared values

- All participants of the peer counselling agree to
- We anonymise all sensitive data
- · All information shared is sensitive and I will treat them like this
- We listen carefully and comprehend actively
- We show a respectful and appreciative attitude about shared opinions

HTTP://WWW.IN50PLUS.COM









4. Preparation

- Please proofread your case
- Decide about the moderator
- Agree on the shared values (next slide)
- · You have 90 minutes to do the peer counselling
- Remember the procedure:

HTTP://WWW.IN50PLUS.COM

10





5. Peer Counselling Round 1

- All participants present a case / problem
- 2. Selection of the most urgent problem
- Detailed presentation of the selected case and definition of the problem
- 4. Round of questions for clarification
- Round of association for possible solutions
- Comments (from the person who receives advice)
- Round of solution presentation
- 8. Final comments and appreciation for contribution

Hendriksen, 2002, p. 25; Fellinger, 2011, p.2f.

HTTP://WWW.IN50PLUS.COM









Peer Counselling Round 1
Space for notes and comments









Peer Counselling Round 2
Space for notes and comments







360° Feedback

Take 10 minutes time and write down

	$\overline{}$
General feedback for the peer counselling rounds	
Soliotal todabaok for the poor doublooming fourido	
	- 1
To adhead for the other prostitioner group (LID for accuracylars and vice yerse)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
eedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	
Feedback for the other practitioner group (HR for counsellors and vice versa)	







Feedback for the same practitioner group (HR for HR and counsellors for counsellors)
Feedback for the trainer(s) (besides the trainer evaluation)





Follow-up day Peer Counselling



Feedback from trainer that you receive





Appendix A

List of questions from HR and counselling practitioners

They are supposed to promote reflections and raise awareness for current topicalities of individuals50+. Feel free to complete or extend the list!

Strategic work force planning

- How to translate market trend indicators into company age strategy (demographic counselling)?
- How to prepare age related processes, e.g. work force planning?

Recruitment

- How to reactivate 50+?
- How to improve employer branding for 50+? (especially personnel marketing, communication channels)
- How to design recommendation marketing? Internally to motivate 50+ colleagues to invite family members and friends to work in the company?
- How to adapt internal recruitment processes (recruitment channels, psychology of job advertising, interview guideliness, methods of assessment, etc)
- How to structure the recruitment process in a technical and emotional manner for 50+, so that 50+ are further encouraged? (adaptation of interview techniques to 50+ applicants)
- Guidelines for 50+ to get rid of prejudices?
- How to appreciate 50+ in recruitment processes?
- Special benefits for 50 + in the sense of Herzberg theory?

Onboarding process

- Positive, critical factors for ageing and age friendly Onboarding
- Leader skills & Specific requirements during onboarding
- How to modify an organizational culture that allows a 50+ friendly atmosphere?
- What arguments to use to promote the value of 50+ inside the company (internal personnel marketing)?
- How to integrate 50+ in the culture?
- How to reorganize the workplace, incl. work conditions (e.g. work time concept), and work place design (e.g. ergonomic aspects)
- Preconditions for self-confidence of new 50+ employees
- How to contribute to them despite differences between younger, 50+ and new 50+ staff members

Established processes

- 1) Performance management
 - Performance measurement how to establish a fair performance measurement system





- How to evaluate fairly 50+ performances in comparison with younger people?
- How can line managers give critical and positive feedback to 50+ in an optimal and useful manner?

2) Engagement

- Key factors to promote 50+'s work engagement?
- How to motivate 50+ in general and towards IT change, work attitudes?
- Is there a difference between motivation factors for older and younger employees?

3) Compensation & Benefits

- How to design an effective benefit system (compensation)?
- (Extra) payments on basis of performance instead of occupational age

4) Diversity management & Leadership

- Diversity management
- How to individualize/facilitate work processes for 50+?
- Leadership competences and raising awareness to overcome generation gaps
- To define leadership attitudes towards 50+
- How to deal with different generations as a line manager?
- How to deal with fears of 50+ / "put myself in 50+'s shoes"?
- How to react empathically on fears, and therefore know to characterize possible fears and understand the reasons for them.
- Expectation of 50+ towards HR and counselling practitioners when seeking help from them
- How to treat private information during counselling in a sensitive way?
- How to ensure confidentiality of counselling/coaching in the company
- Ethical guidelines for internal and external counsellors/coaches in accordance with the company's or organization's values and strategy

4) Succession planning

- How to secure the succession pipe line for 50+ (facilitate succession process)

Further development

- Training methods for 50+
- Conditions for skill transfer, e.g. mentoring
- Mentoring relationship
- Enterprise's values for knowledge exchange (e.g. continuous learning)
- Management and Measurement of knowledge transfer & its success
- Key factors for a successful organization and structure of a mentor process (in a beneficial way)?
- How to motivate younger employees to learn from older employees and vice versa
- Drawing trends concerning the development of 50+ competences in the future?

Knowledge Management

How to store and secure knowledge?





Appendix A

List of questions from HR and counselling practitioners

- How to disseminate knowledge and ensure its frequent use inside the company?
- How to connect 50+ with digital platforms?
- How to organize a functioning alumni community?
- How to reduce the fears of 50+ to transfer their knowledge?

Preretirement process

- How to prepare an 50+ employee for preretirement (mental preparation, programs for transition processes)
- How to support mental preparation for retirement (cooling out)?
- What arguments to use to convince the board for adaptation of the work place and work conditions?
- Which arguments to use to push an employee into retirement or hinder him/her from it?
- How to prepare 50+ to accept the flexi-time
- Other flexible pre-retirement arrangements









Appendix B

Sample solutions for the case studies

Case Study 2 Age friendly onboarding (Module 3)

At the beginning of the onboarding, a joint discussion between Mrs. Muster, the team management and HR responsible should take place with the aim to find out the existing experience knowledge of Mrs. Muster and to compare it with the current job requirements. Resource-oriented approach to increase self-confidence and the self-efficacy of Ms. Muster and to relativize her fear of new things.

The following questions would be conceivable, for example:

- In which areas does she already have experience? (this should be answered with appreciation by the team leader and HR)
- Which of her experiences and skills would be particularly useful in the future (possibly also for colleagues in other departments)?

Subsequently, a joint target/actual comparison of the tasks and the job profile can take place. The meaningfulness of different work packages should be emphasized.

Their current attitudes (reservations, worries, fears) to the new professional situation can also be discussed.

- What concrete measures would help Ms Muster to reduce her fears? / In what areas would Ms Muster still need support?

Finally, an individual induction plan could be drawn up with Ms Muster. Important points here are

- to build as far as possible on the topics/experiences already known to her,
- to design small learning sequences,
- to allow her sufficient time for practical exercises and repetition as well as
- to formulate clear and realistic goals and expectations.
- In addition, regular feedback sessions should be planned and carried out during the induction phase.

In general, it is important to value Mrs. Muster and to convey to her that she is needed by the team and that she, once again, clearly defines her role and her contributions to the success of the team.





Further measures of onboarding could be:

- For a defined period of time, Ms. Muster should have a supporter or some sort of mentor in the form of a technically competent colleague as her first point of contact.
- In addition, Ms. Muster could be offered the option of a home office with the aim of facilitating her home care situation, increasing her motivation, reducing her absenteeism and thus ideally also preventing possible internal tensions in the team due to her absenteeism.
- Furthermore, concrete measures could be discussed to make their workplace as ergonomic/ age-friendly as possible.
- For a better general team integration, joint ventures or team-building events would be conceivable.





Case Study 3 Optimal encouragement 50+ (Module 4)

Several solutions at different organizational levels were collected. Certainly, a combination of different approaches is conceivable:

Solution on the team level:

Organizing community-building measures (team-building events, such as excursions, restaurant visits, outdoor activities, etc.) that create a personal "generation-spanning" contact outside the company environment and thus relativize or overcome the company's role models.

Leadership/control of the department through extended KPI's:

Mr. Muster focuses strongly on the consideration of productivity within his department. The approach would be el in a joint conversation to expand his focus from the exclusive consideration of production figures and to sensitize him to opposing additional costs by making them transparent and discussing with him. Examples of these opposing additional costs could be the level of fluctuation and the resulting costs for recruiting new employees and trainees as well as training and induction costs.

Instrumental:

Also conceivable in the area of training would be the use of a bidirectional evaluation system in which Mr. Muster evaluates both the trainees and also receives structured feedback from the trainees (e.g. feedback questionnaire). Mr. Muster's trainees can thus give an assessment (anonymously if necessary) of their current management situation. The feedback forms could then be evaluated by the master craftsman of the department, the division manager and HR. Afterwards, there would be another discussion with Mr. Muster. The aim is to make Mr. Muster's current opinion of his employees transparent on the basis of the evaluation and to sensitize him to it.

In this way, HR could provide support:

HR could support mutual understanding and once again seek a joint and appreciative discussion with Mr. Muster. The aim of the interview is to use circular questions to encourage Mr. Muster to change his perspective and to put him in the current position of his trainees or





younger employees. The objective is also that at the end of the process, Mr. Muster develops his own suggestions for solutions and ideas for a changed management of his area.

As an example, the process could look as follows:

Mr. Muster is asked how he experienced his training period at that time:

- What did he like back then?
- What did he not like? / What were the challenges? How did he deal with it?
- What would he have wished for back then?

Then his experiences and wishes were to be transferred to the current situation with his trainees:

- What does he think his trainees would tell about the current situation?
- What does he think, how do his trainees see him as training manager?
- What does he think are the expectations and wishes of his trainees?
- What could/will he do concretely to meet these expectations?

Organizational measure:

One possibility would be to add an additional hierarchical level that will take on the responsibility for training and leading the young skilled workers in the future. This would remove Mr Muster's direct responsibility for training and leading young colleagues.

External support:

If all internal company talks were to be unsuccessful, there would still be the possibility of appointing an external mediator between the individual parties (company/department manager, Mr Muster and the group of trainees or young skilled workers).









Appendix C

Training Assessment

Dear participant,

Name of trainer

Please evaluate the development of your own competences in scope of the training:

Date								
Please cross your answers								
You participate voluntarily in the assessment.								
	Very good	Good	Satisfact ory	Adequat e	Inadequa te			
I can draw conclusions from demographic change for my company's HRM methods and instruments.								
I understand the chances and challenges of people50+ on the labour market.								
I can analyse structures and characteristics of my employees or clients50+.								
I know how to improve the internal health management for employees50+. /								
I know how to promote physical and mental fitness of my clients50+.								
I have the legal background knowledge to improve the conditions for								





adults50+.			
I know how to support motivation and factors of job performance so that an employee achieves goals and is satisfied.			
I know how to adapt learning environments for individuals50+.			
I know which culture type is best for my staff 50+.			
I can adapt my own leadership attitude to respond appropriately to needs of individuals50+.			
I can improve the planning of the company's information management regarding the necessities of employees50+.			
I know the features for successful knowledge management in my organisation.			
I can plan and organize a counselling consultation for people 50+.			
I can reflect and evaluate in an outcome- oriented way a counselling consultation.			
I know how to give feedback.			





I can evaluate other counselling			
consultations in a holistic way.			









Training Evaluation

Dear participant,

Please evaluate our training. Read the following statements and indicate your level of agreement by crossing the appropriate box.

Name of trainer	
Date	
Please cross your answers	
You participate voluntarily	in the evaluation.

A. Objectives and contents relevance

	Agree	Partly agree	Disagree	Can't tell
The learning objectives and the course structure was clear.				
2. The topics of the training course are important for my work.				
3. I can apply the course content in my work.				
4. I can transfer the knowledge to my colleagues.				
5. The course has enabled me to continue working independently with the materials.				
6. The contents were easy to transfer into practice.				
7. The level of difficulty was appropriate.				





B. The trainer

	Agree	Partly agree	Disagree	Can't tell
8. Structured the course well.				
Communicated clearly objectives and instructions.				
10. Presented the content in a competent and interesting way.				
11. Explained the content in a comprehensive manner.				
12. Were able to explain difficult content in an easy and comprehensive way.				
13. Reacted sufficiently and appropriately to participants' concerns and questions.				
14. Pointed out the practical relevance of the content.				
15. Highlighted cross-sectional connections.				
16. The interactive sections were adequately organized and structured to integrate participants.				
17. Were interested to achieve a learning success of the participants.				



C. Participants

	Agree	Partly agree	Disagree	Can't tell
18. The atmosphere among the participants was cooperative.				
19. I was able to benefit from the experience of other participants.				
20. The exchange with participants from a different profession was interesting and helpful.				

D. Material and methods

	Agree	Partly agree	Disagree	Can't tell
21. The course material was comprehensive.				
22. The material was helpful to revise the training's content.				
23. The extent of the material was adequate.				
24. The didactical methods, like exercises, supported the understanding of the content.				
25. There were sufficient opportunities to exchange experiences and opinions.				

E. Competence acquisition

	Agree	Partly agree	Disagree	Can't tell
26. The course enabled me to transfer knowledge and know-how into practice (e.g. action plan).				





27. The course's content helps to improve my future practical work.				
28. The exchange with other practitioners was enriching for my work.				
F. Organisation	1	l		
	Agree	Partly agree	Disagree	Can't tell
29. The duration of the course was appropriate.				
30. The speed of learning (content and time in relation) was optimal.				
31. The organisation of the course was satisfying.				
32. The equipment was appropriate.				
G. Overall evaluation				
	Agree	Partly agree	Disagree	Can't tell
33. The course satisfied my expectations.				
34. I would recommend this course to colleagues and/or friends.				





H. Further comments:	

The evaluation questionnaire is based on two questionnaires:

Survey for Training: Second specific ToT "Preparations for infrastructure investment projects" provided by Srecko Goic; and an evaluation questionnaire for trainings designed amongst others by Bernd-Joachim Ertelt and Michael Scharpf





Online training Evaluation

I participated in the f2f training a	nd SDC 🗌			
the SDC				
Please read the following statements and box.	indicate your le	evel of agreeme	ent by crossing	the appropriate
Part I (IO6)	Agree	Partly agree	Disagree	Can't tell
1. The online course's accessibility is				
2. The selection of learning contents in advance is useful.				
3. The personal benefit can be estimated in advance.				
4. The menu is easy to overview and user-friendly.				
5. The course is designed in an attractive and motivating way.				
6. Media elements (pictures, videos, etc.) are appropriate and support learning.				
		I =		A 1 1 1 1
Part II (IO7)	Agree	Partly agree	Disagree	Can't tell
The learning objectives and the course structures were clear.				
2. The topics of the learning units are important for my work.				
3. I can apply the units' contents in my work.				
4. I think I can transfer the knowledge to my colleagues.				
5. The units have enabled me to learn independently with the materials.				





6. The contents were easy to transfer into practice.				
7. The level of difficulty was appropriate.				
8. The length of the learning units were appropriate.				
9. The learning speed was adequate.				
10. The questions and tasks in the learning units support concentration.				
11. The learning units' assessment is adequate.				
Further comments:				