InCounselling 50+

Trainer's guide for the
face-to-face
training

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Trainer's guide

For the face-to-face training

Intellectual Output 4

InCounselling50+

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

The trainer guide for the handbook to further educate

professionals and practitioners with counselling activities

with a focus on the target groups employees50+ and jobseekers50+

An enriching collaboration of:

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InCounselling 50+

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Introduction

This trainer guide covers additional explanations besides the training handbook for the training of InCounselling50+. This guide aims to help trainers organize the classrooms by providing suggestions for the training's realization. **In order to meet national prerequesites and participants' demands, it might be necessary to set another focus or adapt methods within the scope of the trainer's own judgement.**

This trainer guide includes useful explanations how to prepare and realize the two-day training and the follow-up day. At the beginning of each module, you will find the lesson sequence. It describes concretely what activities can be done in the classroom, how much time you should estimate for the activities, and which procedure is suggested for the module. Second, there are detailed explanations, and third, a reference to the indirect target groups.

In addition, this guide ensures that the training follows a **practical orientation**. The training follows an informal learning, self-regulated learning, network learning and focusses on competence orientation. Please keep in mind the four orientations when you design the tasks and exercises, the practical usability of the Modules' content can be ensured.

To further promote the **practical usability** for HR and counselling practitioners, this guide emphasizes different roles of participants. For instance, group work can be carried out among the same professions; or exercises and group works regardless of the occupational differences.

You as a **trainer** cannot take an expert role in the training. As the scientific findings and theories are very new, broad and often apply to only the counselling or human resource area, the trainer's task is to work up and present the content in a useful way that is easy to transfer for participants. Furthermore, practitioners come from different work fields, in which one trainer cannot be an expert. Within the scope of the exchange between various practitioners, the trainer's role is to moderate and mediate sensitively to provide an enriching learning environment for everybody.

To respond adequately to the **three indirect target groups** of the training's participants, there are specifications among the subgroups. The three subgroups are employees50+, those in transition to retirement and jobseekers50+. The references to the subgroups allow you a better specification, for instance when participants might prioritize one of the subgroups. In this way, the other subgroups can be discounted, and you can adapt trainings better to a special interest topic of participants.

For the theoretical background please read the **handbook**. The **power point slides** are provided in a separate section online. The **learners' workbook** covers all material for

participants, and can be found online as well. The workbook includes presentation handouts, exercise sheets, space for comments, the final action planning and case studies for voluntary further learning. The cases are resumed on basis of real-life situations. Participating HR partners wrote them and anonymized all sensitive data. No further descriptions are given for the case studies, possible problem definitions can be open or highly individual problem-solving. Moreover, the cases can be taken for the exercises in the classrooms.

Both, the workbook and this guide provide an **assessment** and a **satisfaction** questionnaire. The questionnaires are attached at the end of the workbook and this guide. The assessment can be conducted before and after the training to track an improvement. The assessment is based on the overall learning objectives of each module, which also provide a general overview of the training and the modules:

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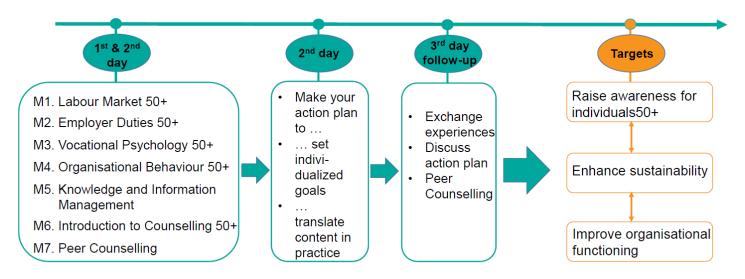
Overview

Training Timeline

MODULE

Labour Market 50+

1

Trainer guide: InCounselling 50+

Name of Module	Workload	Handbook	Workbook
1. **Labour Market 50+**	120 min	p. 1	p. 1

Learning Objectives

At the end of this course, participants 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).

Participants 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

1. Lesson sequence

Time	Sequence	Content	Trainer activities	Learner activities	Social forms
10 min	Ice-breaking activity: Exercise 1	Future-oriented HR policy	Moderator	Participants reflect need for change & action taking, discussion	Plenum
30 min	Presentation	Labour Market statistics and current trends	Frontal and questioning	Active listening and contributing to questions	Plenum
15 min	Presentation	Labour Market and Information asymmetries	Frontal	Active listening	Plenum
5 min	Presentation	Translation of Labour Market Trends and Demographic Management	Frontal	Active listening	Plenum
5 min	Presentation	Succession planning	Frontal	Active listening	Plenum
10 min	Exercise 2	Decisions about successors	Moderator	Participants reflect need for change & action taking, discussion	Plenum
5 min	Presentation	Referral to theory of Exercise 2 decision about successors	Frontal	Active listening	Plenum
10 min	Reference to Critical Incident	Name possible successors for key positions	Moderator	Brainstorming about possible (interactive)	Group work or plenum
15 min	Exercise 3	Age structure or SWOT analysis	Explains task and supports	Analysis own age structure or SWOT	Single work

15 (20) min	Knowledge Securement	Presentation of results or discussion	Moderator	Contributions	Plenum

2.   Explanations for the classroom

This first module gives a first impression of the entire training. The goal of this module is to raise awareness among the practitioner groups to rethink and understand better labour market trends and forecasts, as well as possible consequences -optimistic as well as pessimistic- for the own department.

After the pilot training, expert reviews and internal discussions, section 2 Labour Market and section 3 Information Asymmetries were evaluated less important than the other content.

Exercise 1 serves for participants to rethink the current HR policy and whether it is future-oriented or not. For this, seven items are extracted from the book "healthy work in an ageing Europe: strategies and instrument for prolonging working life". Since the items can cover sensitive data, the results themselves shouldn't be discussed in the training. However, it can be useful to bring together how appropriate participants find the items and questions. This exercise demonstrates participants that they are not supposed to just do the exercises, but also reflect them.

In the first part a statistical overview is given of current labour market trends and forecasts. It is important to calculate enough time for this phase. On the one hand some participants might not be familiar with the topic and need time to understand the big picture. On the other hand, there might be well-informed participants who are able to discuss possible challenges and obstacles.

To give a general idea, how current trends and forecasts can influence the labour market, labour demand and labour supply are presented in the classical goods model. In scope of this theoretical part, the supply and demand movements are explained and discussed. The labour supply and demand are represented in curves. The explanation can cover the prolongation of retirement age, the reactivation of individuals50+, the abolishment of early retirement, the improvement of health management and the political objective to raise the employment rate 55+ to at least 50 %.

The two sections 2 Labour Market and 3 Information Asymmetries were found less useful than the other topics. Therefore, participants can read the handbook text (p. 9 -11) as a preparation for the training. Due to the enormous workload, participants might not have the time to prepare. Then, these two sections can be added shortly into the training or can be skipped.

A prolongation of the work life or a growing labour force represents a growth of the **labour supply** (section 2) and a right movement of the corresponding curve. Considering the overall labour supply realistically, one can detect a reduction because the distribution percentage of baby boomer employees and retirees keep growing. This is why, in the long run other employees need to be recruited.The labour supply curves moves to the left in case of a labour force reduction, e.g. more employees with early retirement, an increase in employees who left to work abroad.

Equally the **labour demand** (section 2), several stereotypes of employees50+ can lower the demand, e.g. when employers see younger employees more capable and prefer them before employees50+. Employees50+ with a good health therefore can help to abolish stereotypes and make employees50+ more attractive for employers. In the case of Poland and Croatia, many young employees leave to work abroad. This can be an indirect impact that makes the demand grow for employees50+.

The rising demand represents a right movement of the labour demand curve. A left movement of the labour demand curve can be due to external impacts, for instance, recession or downsizing the enterprise.

The principle agent theory discusses how **information asymmetries** (section 3) can be avoided in the context of employees50+. This part serves to lead over to the last part translation of market trends. This part includes various exercises to make participants reflect the current enterprise and HR strategy. Consequently, more exercises provoke reflection of the topic and along-going possible opportunities and threats for the enterprise. Additionally, critical incidents are given to think about necessary changes in future. The final exercise is an analysis of the own age structure. Depending on the participant's information level, there are two varying exercises. First, a general age structure analysis can reveal urgent need for action. Second, a SWOT analysis of the individual age structure serves to detect different kinds of challenges, obstacles and opportunities. In the following the five different exercises are described.

The ice-breaking activity can be recaptured at this point. The results are a good starting point for participants' sensitization towards a better harmonization between organisational and HR strategy. Unfortunately, HR management very often does not take on an important role besides financing and marketing. However, as this slide below shows, seven steps can help to improve the alignment between the overall strategy and a HR strategy. This is a first step to consider HR management needs in the overall business planning in a sustainable manner. Of course, the overall strategy needs to be future-oriented and applicable in the HR

management. Counselling practitioners in this context can provide another perspective and derive other, less frequently considered forecasts and trend developments. Thereby, they inform HR practitioners about the labour market situation for jobseekers50+. Getting to know other perspectives can facilitate the establishment for a long-living, beneficial business planning.

Exercise 2 queries participants how currently succession planning takes place in the organisation. This is a more specific question. This Exercise 2 is placed after Exercise 1 to allow participants a gradual reflection from general to detail. This exercise at a first glance seems to exclude counselling practitioners. However, in contrast. This Exercise gives insight how employees are recruited and onboarded in the enterprise. This can help counselling practitioners to improve the consultations and decisions of clients by considering more realistic aspects. Equally, the instruction: "How would you recommend an HR manager to make decision about successors for positions in an organisation?".

After the collection of results and suggestions, there can arise a discussion. It is useful to have a brief discussion about succession planning. Nevertheless, there is a final discussion at the end of this Module 1. To guarantee a good time management, it is the trainer's task to moderate efficiently the tasks, collection of results and procedure of the presentation. In a second step, the results are related to a theoretical input. Therefore, crucial aspects of a successful succession planning are presented.

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
- Generali-
  zation
  of all
  employees
  (McDonalds)
- Individuali-
  zation of
  employees
  (Starbucks)

Anyways, succession planning and the management of key resources often go along with the development of high-potential and highly qualified employees. In this context it is important to emphasize the training and education needs for low qualified and older workers. For a proper comprehension, it can be reasoned that enterprises need to change the perspective for performance improvement. It is to say that not the key resources are of high value, but also the value of the job for the performance maintenance.

To raise awareness that the analysis of the staff's age structure (Exercise 5) is necessary, a critical incident is given. The critical incident is not part of the classroom. It can be done by participants outside the classroom in scope of self-studies. However, in the classroom shall be put a reference to it. The critical incident is: "Imaging you lose a key employee or manager on short notice. Select any area you wish. Who would be ready to substitute the position? Name anyone!". There are two versions of the critical incident. One refers to the present, the other to the near future.

Exercise 3 is the overall and final exercise of Module 1, and at the same time is a transition to Module 2 with a focus on health management amongst others. To respond appropriately to participants' different knowledge levels two varying exercises are provided. It is either an analysis of the age structure for participants, who have not thought profoundly yet about their

staff. Or, it is a SWOT analysis of the own age structure, so a resume of strengths,

Internal analysis / External analysis	Strengths	Weaknesses

weaknesses, opportunities and threats.

Version 1: Age structure analysis (Morschhäuser & Sochert, 2006, p. 24f)

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. Is it 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?

Opportunities	SO strategy	WO strategy
Threats	ST strategy	WT strategy

Or Version 2 SWOT age structure.

To fill out the SWOT analysis, participants first fill out possible strengths, weaknesses, opportunities and threats. The second step is to derive possible strategies, for instance which strengths can become an opportunity or a threat. It is useful to consider the following HR fields while doing the SWOT analysis: Recruitment of staff, qualifications, work organisation, staff development plan, workplace health promotion and integration, know-how transfer, organisation of working hours, corporate culture.

3. Reference to the subgroups

Employees50+

Employees50+ are a growing percentage of staffs because of the numerous cohorts in the baby boomer generation. As shown in the theoretical part many employers and HR departments need to rethink work schedules, work places and work conditions. This is the reason, because countries of the European Union gradually rise the retirement age to 67 years, and increase the employment rate to at least 50 %.

As mentioned in the handbook, the 50 % goal is difficult to accomplish for some countries. This is due to a growing number of employees, who leave to work abroad (intra-EU-mobility).

Furthermore, in the case of Poland the retirement age of 67 was abolished after a former government had passed it. This is due to a government change.

Employees50+ remain longer in enterprises and work longer. This implies various challenging tasks for the human resource management and for counselling. Often enterprises are not aware or underestimate the consequences of such changes. Therefore, the above explained exercises serve to raise awareness and provoke overthinking own structures and methods, and might cause a change.

In the project's own survey it was found that employees would like employers to participate actively in their retirement planning. Therefore, the internal management should be adapted.

Employees in transition to retirement

Retirement planning includes not only the decision of the transition model and and optimal adaption of the work place and the work conditions. There is more, financial planning should be included in the long run, to allow possible and/or necessary early retirement. To give an example: German politics decided not to support early retirement any more, since the labour force capacity needs to be maintained. For this the retirement age was rised to 67, and the employment rate 55+ is supposed to overcome 50 %. Hence, early retirement or other methods facilitating an earlier dismissal from the labour market are avoided.

In the long run, the prolongation of retirement is accompanied my more individual cases. This means, as older individuals are a growing diverse part of the population, more individual solutions have to be found, for instance when it comes to physical limitations or health restrictions hindering the continuation of work. Nevertheless, also in the long run forecasts predict that the activation and reactivation of older employees is not enough to maintain the productivity level. This can be demonstrated with a decreasing curve of the labour supply.

Jobseekers50+

As mentioned before the future labour market is facing bottlenecks and shortages of skills and labour. In some sectors this is a more severe phenomenon, in others not. To maintain the labour force level, older employees are reactived. A special role play housewives who inherit a broad set of various competences. Regardless of the jobseekers' background, enterprises can improve age-friendliness. For example when recruiting or boarding on new employees50+, it can be beneficial to address individuals'50+ needs. Responsibles in these areas should know that employees50+ have a strong desire to show off. In particular

because they perceive own knowledge and skills as obsolete, and thus, not able to compete any more with younger collegues. When planning onboarding processes, it can be beneficial to disregard mentoring and coaching in the first place. Several interviewees and surveyants reported that this would make them feel disabled.

To return to the labour market trends, to ensure a labour market integration a certain emphasis should be set on long-term unemployed. To prevent exclusion from the beginning on, can facilitate activation or reactivation, or make it even redundant.

MODULE 2

Employer Duties

50+

Trainer guide: InCounselling 50+

Name of Module	Workload	Handbook	Workbook
2. Employer Duties 50+	120 min	p. 19	p. 22

Learning Objectives

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

Participants 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

1. Lesson sequence

Time	Sequence	Content	Trainer activities	Learner activities	Social forms
30 min	Presentation	Legal regulations Training Transition Management Introduction Health Management	Frontal		Plenum
10 min	Introductory task	Need to develop employees	Moderator	State opinion and reason it	Plenum
10 min	Excercise 1a.	Work Ability Index	Explains task and WAI, gives ideas	Fill out WAI for themselves (anonym) Discussion about content of the WAI; Learners collect advantages and disadvantages	Group work
15 min	Excercise 1b.	Advantages / Disadvantages WAI	Introduces the task	Writes down advantages and disadvanatges and prepares the discussion	Discussion
5 min	Presentation	Presentation of WAI's advantages and disadvantages	Frontal	Present their solutions	Plenum
10 min	Presentation	Strategies and Instruments	Frontal		Plenum
10 min (optional)	Interactive exchange and presentation	Transition Management	Frontal and moderator	Listen and contribute actively	Plenum

	of transition models				
30 (20) min	Exercise 3 Case Study	Health management strategies and instruments Opportunities, costs, challenges	Explains task, gives ideas	Derive strategies and instruments, costs, opportunities	Groupwork
10 min	Securing Knowledge	Presentation of results and discussion			Plenum

3.   Explanations for the classroom

This module is estimated to last 120 minutes. The topic is employer duties of employees50+, employees in transition to retirement and jobseekers50+.

The classroom starts with a citation:

> " CFO asks CEO: "What happens if we invest in developing our people and they leave?"
>
> CEO: "What happens if we don't, and they stay?"
>
> -Peter Baeklund "

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The trainer presents the abovementioned citation to participants. To introduce the topic the trainer can ask participants whether they agree more with CFO or CEO. This shall serve as an anchor for attention and is going to be discussed later on in the classroom. This is because, the first input wants to ensure to go into the right topical direction. Employees' development is a broad field and can be understood in many different ways.

After the first presentation of the citation, the explanation of the learning objectives and the module's overview, an introductory first input is given. It has to be clearly emphasized that there is no specific law for older people. One could argument that legislation on transition and retirement regulations apply to a certain age group. Anyways, there are no concrete laws exclusively for certain cohorts. This reflects the prohibition of any discrimination, which means that nobody due to age –neither old nor young- should be treated unequally or unfair.

Current demographic changes affect several fields, which employers need to improve to ensure equal treatment. New framework conditions, require innovative methods to integrate all employee age groups. Based on the project's needs analysis, this refers specifically to

further education, training and health management. Said in different words, those topics are recently found to require particular attention.

As the project is implemented in several European countries, the European guidelines and decisions are presented for further education and training. The guidelines draws a general line of the topic. Regardless of specification, it is useful for participants of any country to get to know the European guidelines, as the guidelines are going to be translated into national law sooner or later. Talking about specification, on one hand, the specification for each country can point out national peculiarities that would get lost in a general overview. On the other hand, the specification can be adapted to current renewals and, thus, remain up to date. Below the corresponding slide is shown. The structure is to refer briefly to the European guidelines and, in a second step, go into details of the national legislation. The amount and details of legislation is within the trainer's assessment. The trainer, you, can choose where to set highlights in the training and, therein, select demanded issues of recent relevance for HR and counselling practitioners.

In this context, a technical note shall be made: All material is provided for free. If there are made any changes, the changed material have to be shared again.
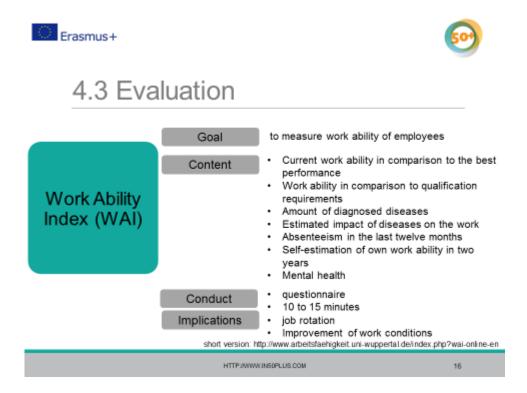
After the introductory input, the citation is recaptured again. Participants should give their opinion to the topic and reason why they are against the CEO's or the CFO's opinion.

Consequently, the importance of the generation50+ on organisational level is emphasized and reasoned. At this point a connection to module 3 is given. The urgent need to train older employees is explained as an employer duty. As the topic is more psychologically, concrete details on it are given and explained in module 3.

As mentioned above, a strong focus shall be on health management and the maintenance of employees'50+ physical and mental fitness. It was found that the main reason to stay active or to become inactive is the individual's health condition. Even employees aged under 45 years state their health condition as the main reason for remaining active or not short before retirement. As the training follows a practical orientation the core of the health management part is the work ability index. It is a questionnaire that allows enterprises to evaluate the employees' work ability.

4.3 Evaluation

	Goal	to measure work ability of employees
Work Ability Index (WAI)	Content	• Current work ability in comparison to the best performance • Work ability in comparison to qualification requirements • Amount of diagnosed diseases • Estimated impact of diseases on the work • Absenteeism in the last twelve months • Self-estimation of own work ability in two years • Mental health
	Conduct	• questionnaire • 10 to 15 minutes
	Implications	• job rotation • Improvement of work conditions

short version: http://www.arbeitsfaehigkeit.uni-wuppertal.de/index.php?wai-online-en

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More specifics of the internal health management are explained to ensure a successful implementation of the questionnaire and potential consequences. After the exercise of module 1, participants in this Exercise 1 have to evaluate their employees or clients. There are two versions of the questionnaire, a short and a long run. Due to the module's length of 120 minutes, the short version of the questionnaire is conducted. The questionnaire is

provided in the workbook. After participants have filled out the items, a brief discussion about advantages and disadvantages of the questionnaire is realized. Participants can report about their experiences or problems while filling out the questionnaire. The discussion and externalization aims to make participants reflect their own employees50+ and their own experiences. As a consequence, they can conclude possible improvement steps, which they can include in their action plan.

The action plan is an activity that is integrated as an exercise in module 7, at the end of the training. The action plan ensures to individualize and recapture necessary objectives of the training.

In a second input phase, knowledge and know-how of development strategies and instruments, as well as transition models and transition management is given. This transition management can be extended by an interactive exchange of experiences. This optional Exercise 2 should give an overview of current practices and serves as a basis for improvement and adaptions inside the company. The questions are formulated in a way that HR and counselling practitioner can answer them.

The final Exercise 3 is a Case Study. The case covers the topic health as a key factor for fitness. The cases were resumed by HR partners on basis of the project's needs analysis. The case can serve to find out arguments that would convince enterprises' responsible to improve the internal health management, or to consider the employees50+ in a better way. At the same time reasons for or against health improvements can serve as arguments to prolong or shorten one's activity phase. For instance, some employees are welcome to stay longer than their retirement age, while other employees are welcome to leave earlier.

For the exercise work, the trainer builds a maximum of five groups. To do the Case Study, participants get around 25 minutes. During this time, participants read carefully the case and define commonly a problem, to which they find a solution. Participants need to find certain criteria of an enterprise's strategy that goes along with the solution. Mutually, they shall name concrete instruments for the problem-solution, and finally think about benefits and challenges. In the last step, by naming benefits and challenges, each participant can reconnect to the own employees' and own enterprise's needs and characteristics.

After the group work, solutions are presented in the plenum. All results are collected by the trainer on a black board or a screen. Participants can copy the results, or get them provided by e.g. a screenshot. Depending on the number of the groups, the presentation in the plenum can last more or less time. As all groups had the same case, it would be best to first

listen to all group solutions, and after all comment and discuss the final overall results. However, it might be useful to comment and feedback each group individually. This is upon the trainer's assessment. During the group work he or she can walk around and compare the solutions. If the solutions differ extremely, an individual commenting and feedbacking may be better than the overall discussion.

Counselling practitioners in this context can provide information input regarding the needs and characteristics jobseekers and jobchangers50+ have.

Depending on the time left, more or less focus can be set on the transition management. This rather short sequence starts with three questions. First participants shall report which transition processes are already used for smooth transition processes, how they are financed in the company and which arguments can serve to convince employees50+ to stay. The second step can serve as a discussion in the classroom or as a provoking question for further reflection outside the classroom.

Erasmus+

50+

6. Transition Management

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

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The second slide shows possible transition models. As said before, depending on the time left, this part can be more or less focused. If there is sufficient time, the first exchange about arguments to prolong activity can be extended with the question "What good practice experiences with transition models do you have? Which models can you imagine to implement in your organisation?

4. Reference to the subgroups

Employees50+

Especially the target group employees50+ and low qualified workers are granted less access and less possibilities to further training and education. Despite the fact, that older employees do not strive for promotion possibilities and self-development on the job, training was found to be valuable for **cognitive fitness** that affects **physical fitness** in the same way. To promote physical and mental fitness among the own staff, has beneficial influences for the own productivity and the climate.

The **work ability index** serves as an initial anchor to reconsider the enterprise's methods and instruments. It can be even useful to integrate health aspects into the strategy. Nevertheless, it is important to choose well instruments and methods for the health management. In the project's own needs analysis, it was found that some companies were not able to establish health courses because local sports clubs were so dominant and present. Thus, regardless of the company, many citizens50+ were integrated in the sports club and did not have time to participate in other physical activities. The task is to figure out appropriate methods that respond to the employees' needs. This can be a medical checkup, offering fresh fruit in a short break during the worktime or even providing massages once a month.

The work ability index doesn't cover **further training and education** however the importance of it shall be resumed with the following extracted three paragraphs from "Improvement of the working conditions for baby boomer employees, requirements and needs of employees aged over 50" written by Holder and Scharpf (p. 2-3):

[…] learning is a cognitive input and probably has positive effects on cognitive ageing (FitzGerald, Reid, & O'Neill D 2017). Furthermore, it helps to externalize (Nonaka & Takeuchi 1991) internalized routines and monotonous activities. Additionally, the regular repetition and acquisition of knowledge prevents workers with monotonous activities from forgetting knowledge and skills. […] Nonetheless, as the Cedefop report (2011) for vocational training shows only about a half of older and low-skilled workers - in comparison to young and middle-aged workers - participate in training. If one analysis the situation of SMEs, the fact that those HR departments face more limited capacities makes the situation even more precarious. […]

Trainings in this context provide a key source to motivate employees and to maintain cognitive fitness, which in turn is beneficial for SMEs. Cedefop (2011) has already

recognized that those enterprises might have a necessity to draw the HR potential in a better way.

It can be concluded that besides the psychological preconditions for training of older employees, it is an employer duty to guarantee access and participation for employees50+ in further education. Again besides psychological preconditions, employers can improve training's attractiveness for this peer group.

Employees in transition to retirement

Furthermore, cognitive and physical fitness show beneficial effects on the long run. One possibility to allow a smoother transition process into retirement can be to make trainings and courses accessible for retired employees. This can be one type of **retiree clubs**. Or this can be integrated in the reunions of retiree clubs. Retirees can either meet to do physical activity or to get together for other issues. This also goes along with module 3 findings. They can still reunite with old social / vocational roles. In this way, the former vocational role can still be performed and a transition process to new roles and daily activity, most likely, occurs more smoothly.

An employer further has the duty to connect the content of module 1 and module 5. This is specifically to plan human resources, and those who will retire in the upcoming two or three years. This is important for knowledge and information management issues. This topic is covered in module 5. However, to ensure a company's productivity, an employer has to care about his or her employees. For this subgroup this is mostly succession planning, health management, proper learning possibilities and enabling an individual appropriate transition process. Although politics still require many more renewals and adaptations, an employer could offer individualized transition processes. In a personal interview some employees can be even encouraged to stay longer. As life expectancy and healthy life expectancy is about to raise, people are able and often willed to be longer active. Usually those who have an academic background or work in higher positions are interested in activity after retirement. Nevertheless, many employees are unable to continue to work, because of physically demanding work and health limitations. They often help their families or at home. For this, more forms of activity after retirement shall be accepted, e.g. caring for own parents or family kids, and so on. This equals activity but is not regarded from official sides.

Jobseekers50+

A specific problem is the health management and further education and training for jobless and jobseekers50+. Health and learning are two crucial concepts to foster mental and physical fitness and they are disregarded in case of this subgroup. As a consequence, this represents a disadvantage, and in the long run makes them fall back behind other labour forces on the labour market. Therefore, it should be a task to make trainings and physical reactivation accessible for jobseekers50+.

In scope of these trainings, skills and competences can be updated and prevent to fall back behind other competitive labour forces. However, besides remaining own skills and competences up to date, it is important to care about jobseekers health condition. In general, most jobless people lack a daily routine and also suffer from some sort of social exclusion. To resume, the daily life is scarcely satisfying which affects well-being and the ongoing job search. In the long run, it would be beneficial to establish physical and mental reactivation possibilities in particular for jobless50+. HR practitioners should be aware that these preconditions affect equally recruitment and onboarding processes.

In this context it is important to report about the project's interviews that were conducted for the needs analysis. Interviewed counsellors reported that especially jobseekers50+ feel themselves punished when they get a mentor for the onboarding process in an enterprise. They feel to have a lot of experience and do not consider it necessary to receive specific help to get acquainted with the company and the new job.

Further insights and explanations are provided in module 3 in the section of self-efficacy and self-regulation in transition processes. Such transition processes can be a dismissal, starting a new job or retirement.

MODULE 3

Vocational Psychology 50+

Trainer guide: InCounselling 50+

Name of Module	Workload	Handbook	Workbook
3. Vocational Psychology 50+	120 min	p. 39	p. 44

Learning Objectives

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

Participants 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

1. Lesson sequence

Time	Sequence	Content	Trainer activities	Learner activities	Social forms
15 min	Anchor	Brainstorming of older employee's stereotypes and characteristics	Explains introductory task	Brainstorms own knowledge, stereotypes and characteristics of older employees	Single work and plenum
5 min	Presentation	Learning Objectives and Overview	Frontal	Listening	Plenum
40 min	Presentation Part 2	Self-perception at work, Overview and Motivation, self-efficacy and self-regulation	Frontal	Listening and taking notes	Plenum
7 min	Presentation Part 3	Suggestions for companies Cognitions of older adults	Frontal & moderator	Listening, and reporting	Plenum
3 Min	Knowledge Securing	Interactive summary	Moderator	Comments for summary	Plenum
10 min	Exercise 1	Exercise about reflection of own 50+ employees (recap to brainstorming)	Explains task, gives ideas	Preparation for exercise 2	Single work
10 min	Exercise 2	Exercise about reflection of own company's values & ageing-friendliness	Explains task, gives ideas	Writes down characteristics of own employees & presentation	Single work and plenum

| 10 min | Exercise 3 | How would you convince your colleagues for ageing-friendly company values? | Explains task, gives ideas | Prepare arguments and counterarguments for discussion | Partner or group work |
| 20 min | Discussion | How would you convince your colleagues for ageing-friendly company values? | Moderator | Two circle discussion | Plenum |

2. Explanations for the classroom

The introductory activity is a brainstorming, conducted by each participant as an individual work. The question for this activity is: When do you consider a person/an employee as old? What characterises such an old person? Participants have 5 minutes to brainstorm about typical stereotypes and age.
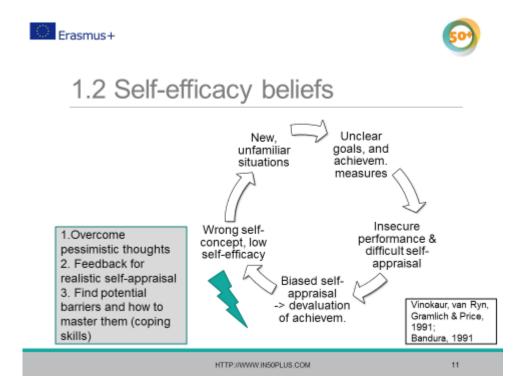
Afterwards they present their results in the plenum. The trainer secures the results on a black board or on a power point slide. There is also room for brief exchanges between participants. Maybe others want to comment a bullet point, add something or remind of an opposite. This initial exercise has various functions. First, knowledge about stereotypes can refer to **informal knowledge**, which participants have acquired in practice or in daily life. To let participants brainstorm about stereotypes, activates their prior knowledge about employees 50+. Both, HR and counselling practitioners' perspectives are considered and brought together.

This brainstorming serves as a base for the reflection of own stereotypes, after the presentation of knowledge. Possible questions for the reflection can be: "At which age are stereotypes obsolete?", "Is there a difference between motivation factors for older and younger employees?" or "How can one foster self-confidence of 50+ and new 50+ employees?" This method allows a differentiation of both participant groups. Simultaneously it ensures a same starting point and, continuously, a mutual beneficial exchange.

Second, this activity shall generate motivation. The brainstorming shall provoke a reconsideration of the own employees50+ and raise interest in the topic motivation, self-efficacy and self-regulation of persons50+.

Discussions, comments or exchanges from participants are welcome at any time. Also during the frontal presentations. The main goal is to establish an interactive learning environment. As an example:

1.2 Self-efficacy beliefs

This slide shows why people50+ may have problems with building self-confidence. To avoid overloaded slides, only the most important information is shown, while in the presentation the speaker gives further input. Participants can select the most important points from the lecture and take the relevant notes. In addition, after the explanation of the content, it may be useful to ask participants about their opinion and experience. In the discussion, participants have the chance to exchange about interesting topics. The instruction is "Which arguments convince your colleagues to establish ageing-friendly values?". This instruction is given orally, but there is space for the answer in the learner's workbook (page 22). This question recaptures the potential exchange question of module 2 in scope of transition management models. Then, when discussions in the plenum take place, the trainer has a moderating and guiding role.

After the three presentation parts, learners have received the input. In a next step, they shall reconsider the initial brainstorming. Therefore, the slide shown below serves as an anchor. The last slide represents the project's survey and interview results. These characteristics are results from the interviews that were conducted with HR and counselling practitioners

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2. How to be ageing-friendly?

- Characteristics of older adults:
  ◦ liable and reliable,
  ◦ punctual, committed, less absent,
  ◦ more emotional than career driven needs
  ◦ more curious about safety

Exercise 2.

List main characteristics of employees 50+ in your enterprise / organisation.

Own survey results, 2017

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The instruction "List main characteristics of employees 50+ in your enterprise/organisation!" then refers to the individual organisation or company. While the brainstorming was in general about persons 50+, this activity sets the focus on the individual organisation. It serves as a transition to the final exercise and shall make individuals reflect the needs of their own staff and raise awareness to consider own employees' needs.

The second task aims to connect the needs of employees 50+ and the companies or organisation's specific values or strategy. This session shouldn't be longer than 10 minutes. In this time, participants prepare a brief description of a value or strategy and develop independently an optimized version in relation to the own findings of employee needs. This refers to a low level of **self-regulated learning**. The problem is openly structured, which is usually a complex level of knowledge transfer. Anyways, due to the prior experiences and know-how, participants are able to connect informal acquired know-how with newly presented input in relation to the individual company. It can be assumed that participants unconsciously underlie the own company's values and culture, which lowers the complexity level of the exercise.

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Exercise 3.

1. Which enterprise values correspond to 50+ characteristics? (E.g. enterprise value: job statisfaction since it triggers higher performance).

2. Are adequate measures for job statisfaction for employees50+ given in your company?
How do you promote age-friendly feedback to foster jobseekers'50+ satisfaction?

This exercise serves as a preparation for the final discussion. Therefore, participants work out arguments to convince colleagues to create ageing-friendly values. Simultaenously, they work out counterarguments. The final discussion is then carried out between two groups. Two chair circles are build; an inner and an outer circle. Those who take a seat in the inner circle represent the counterargument (against ageing-friendly values). Those who sit in the outer circle are in favour of ageing-friendly values. Thus, always two participants discuss pro and contra arguments. After five minutes seats are changed and other participants pair. In this way, four discussion rounds are made. Although five minutes are quite short, this is the intention of the discussion style. Its goal is to have as many exchange partners as possible.

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3.   Reference to the subgroups

Current literature about motivation, self-efficacy and job performance of individuals50+ only cover scarcely the differentiation among the following three subgroups. That is why, in this section further information upon the three subgroups are given. The information can serve as a further input and specialization in the training.

Employees50+

Since retirement ages are gradually increased in many European countries, it is important to optimize work environments for employees above 50 years. This refers to the adaption of work conditions and of work places. Furthermore, a growing number of people50+ decide to change their job or the occupation. In scope of the Learning Nugget about career development theories, practitioners can understand and optimize better matching and onboarding processes between an individual50+ and a profession. However, various factors such as current and future life expectations and the actual health situation have to be considered. Individuals50+ that are looking for another profession have a high motivation to retrain and to learn new things. This motivation leverages a lot of potentials and sets free a high self-efficacy. This self-efficacy is, moreover, realistic due to the work experience. Nevertheless, it has to be taken into account that employees50+ face a physical decline for the upcoming 15 years. Thus, the work activity and the work surrounding -including work conditions- shall be ageing and age friendly. This means, less physical exhausting work, more mentally complex work. Enterprises can adapt the work place to ergonomic standards, design shift works more stable. In addition, they can offer fresh fruit in a morning break and offer physical activities. These are conclusions from module 2, which can be connected with module 3 and how motivation, vocational self-efficacy and job performance can be fostered.

The needs and motivational factors for individuals50+ represent criteria that can raise an **employer brand's** attractiveness for this target group. Every person, regardless of age, is an individual with own needs, values and skills. Despite individuality, generalized peer characteristics can provide information that apply to several of the peer. In the project's study and other studies it was detected that the current 50+ generation is liable and reliable to their company. Besides, they are punctual, less absent, and careful about security and quality. Most of them have gone through a socialization process in which these values were of enormous importance. In module 4, corresponding leadership attitudes and company values are pointed out, such as reliability, security and a good functioning work process responding to punctuality and low absenteeism. These criteria can help to establish an age friendly onboarding process.
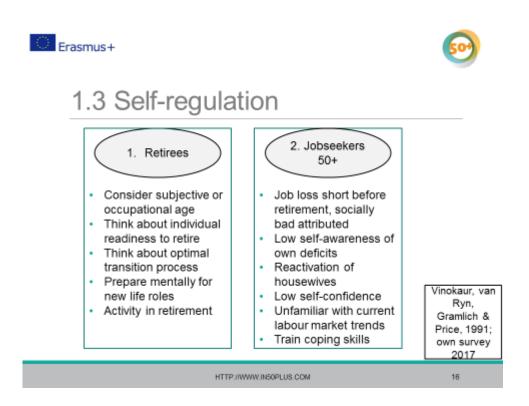
Another discussion could be about the difference between **ageing and age-friendly**. Ageing refers to the process of getting old. Getting old in an enterprise goes along with preventive methods, such as physical activity and maybe nutritional suggestions. Redesigning a work environment can prevent physical limitations in age. The concept of age-friendly follows the period of ageing; regarding older persons. Then, physical limitations can be more severe and no more preventive but reactive steps have to be chosen. For instance, a shift in work activity to avoid hard work due to physical decline.

Employees50+ in transition to retirement

In module 3, the topics are motivation, self-efficacy and self-regulation. The reference to employees in transition and jobseekers50+ takes place in the part of self-regulation. This is due to the difficulty individuals50+ have when they are confronted with unfamiliar, new situations.

In connection with transition and retirement processes some employees are more or less motivated to retire. It is the HR practitioner's job to encourage an employee to retire or to keep on working with respect to their individual goals and to the health condition. It can be beneficial to consider various **age concepts** for one employee. They may include the feelings of the old individuals, the duration one works in the company or the total duration of one's work life. It is important to avoid a hasty decision pushing an older employee in an undesired direction, as this could hinder a person's motivation and self-efficacy. A counselling or HR practitioner should be aware that neither overeffort nor underestimation is beneficial in this context. Slide 23 reconnects to the introductory brainstorming of 50+'s characteristics and discusses various age concepts.
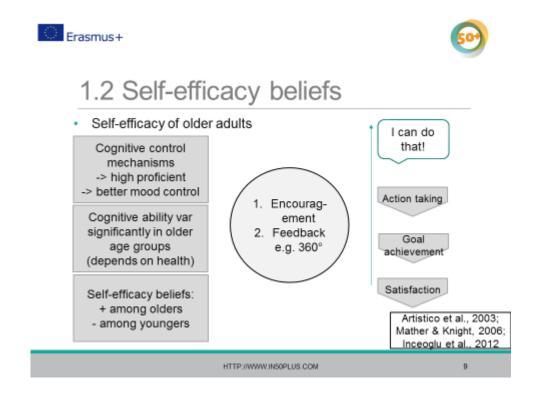
In scope of encouragement, most employees do not consider the change of own life roles and might not have set goals for the own retirement. Such goals do not have the characteristic of performing and measuring a concrete success or development. These goals

are about occupying to a certain **activity after retirement**. Furthermore, as showed in the motivation part, many employees have integrated or adapted to the company's values over the work lifetime. Such a value integration cannot be changed quickly. Especially, since individuals50+ are not prone to change any more; and since they need more time to adapt to new situations. Under consideration of these individual circumstances, the transition model should be selected as well as a sensitization towards activity in retirement.

It can further be helpful to let future retirees model their roles and activities after retirement. This serves as a **mental preparation** for this life phase. Many employees who are going to retire soon, state that they like to take advantage of their free time. Nevertheless, this would be a dramatical and difficult change for retirees. As shown in the slides, encouragement and feedback can foster change processes.
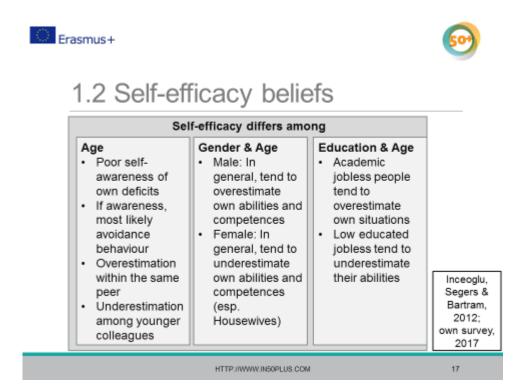

Jobseekers50+

The reference to jobseekers50+ is embedded mostly in the part of self-efficacy and self-regulation. Job dismissal is negatively attributed from society and, therefore, often goes along with feelings of shame. In addition to that, especially older jobseekers are connected with **negative stereotypes** and might be endangered of social exclusion.

One of the most important facts for jobseekers are that they are not familiar with recent labour market characteristics, and might even have forgotten how to write a proper application. Those with a higher education background tend to overestimate their opportunities and are not aware that income levels are lower than decades ago, when they have started working. Besides that, the **changed working conditions** makes it harder for them to find a job. In a sense that they expect to be granted same freedoms and bounties as when they applied years ago under different conditions.

Jobseekers with no or low education background tend to be less selective about jobs. This could be due to a general **underestimation** of their own abilities. However, counsellors reported that these people recovered quickly and gained motivation through enough **encouragement**. For example, when it comes to training in which also younger individual's participated, older jobseekers feared to go or didn't go at all. Several consultations were necessary to convince the client not to give up. Finally, the training with younger jobseekers were even beneficial for the older ones since the younger ones were able to get the client helpful tips for the application.

1.2 Self-efficacy beliefs

Self-efficacy differs among			
Age	**Gender & Age**	**Education & Age**	
• Poor self-awareness of own deficits • If awareness, most likely avoidance behaviour • Overestimation within the same peer • Underestimation among younger colleagues	• Male: In general, tend to overestimate own abilities and competences • Female: In general, tend to underestimate own abilities and competences (esp. Housewives)	• Academic jobless people tend to overestimate own situations • Low educated jobless tend to underestimate their abilities	Inceoglu, Segers & Bartram, 2012; own survey, 2017

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In general, when it comes to **training for jobseekers50+**, it was found useful to also show them how to cope with difficult situations and set a focus on the acquisition of coping skills during the job search. A study found this of particular use for jobless individuals. They suffer
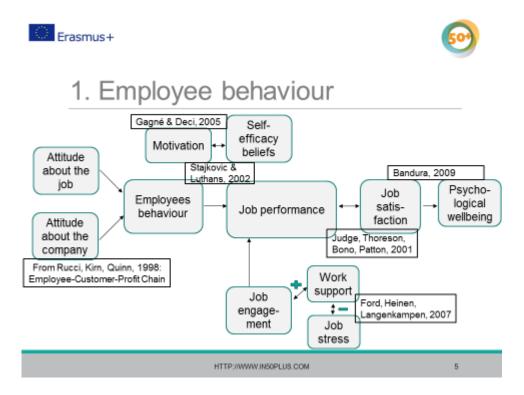
from pessimistic thoughts in the long run, which consequently affects their self-efficacy beliefs. Here the part of the module's content shall be cited (module 3, p.9):

For people suffering from job loss, a training with observational learning and role playing was established. The role plays integrated the detection of obstacles, the formation of coping strategies to solve new problems, and how to find alternate solutions. This training taught them how to search more effectively for jobs and to cope better with failures or backsets (Vinokaur, van Ryn, Gramlich & Price, 1991).

In this context, a special consideration shall be given to the **reactivation of housewives**. Counsellors reported that they have good skills in organisation of events and a household. Many of them are familiar with a broad set of skills and competences, e.g. accounting. Opposing their own skills, they considered it impossible to take a job with very similar tasks. Many of them reported that the tasks would be too difficult for them. Taking into consideration that housewives have organized an own household, raised their own children and maybe took care for their parents for several years, shows that they have a broad set of organisational and caring skills. These are skills, which are extremely useful on the recent labour market.

As stated above, individuals that suffer from low self-efficacy and lack of motivation need in particular support and encouragement. Also for housewives it can be useful to retrain coping skills.

MODULE

Organisational Behaviour 50+

4

Trainer guide: InCounselling50+

Name of Module	Workload	Handbook	Workbook
4. Organisational Behaviour 50+	120 min	p. 65	p. 58

Learning Objectives

At the end of this course, participants 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+.

Participants are going to learn about:

- To know most relevant theoretic aspects of organisational culture, motivation, and leadership.
- To understand ways and problems to influence organisational behaviour.
- To investigate and analyse motivation and other behavioural aspects of a particular group and/or organisation.
- To develop plans to integrate employees 50+, employees in transition, and unemployed 50+ into organisational culture.
- To develop or improve 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

1. Lesson sequence

Time	Sequence	Content	Trainer activities	Learner activities	Social forms
15 min	Presentation Part 1	Learning objectives & Overview Organisational or corporate culture Subcultures and generation differences Summary	Frontal	Listening and taking notes	Plenum
15 min	Exercise 1	Organisational culture – quiz Questions for discussion related to organisational culture and CVF	Explains tasks Moderator	Filling the quiz Brainstorming own experience upon organisational culture Discussing CVF upon the own example	Single work Partner or group work
15 min	Presentation Part 2	Motivation Motivational theories Summary	Frontal	Listening and taking notes	Plenum
15 min	Exercise 2	Exercise about motivational factors relevant to employees 50+	Explains tasks Gives ideas	Writes down motivational factors & presentation	Single work Plenum
15	Presentation	Leadership	Frontal	Listening and	Plenum

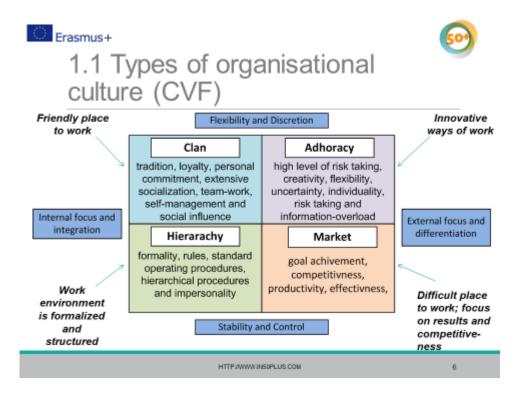| min	Part 3	Leadership styles Summary		taking notes	
18 min	Exercise 3	Exercise about appropriate leadership style for 50+ Questions for discussion	Explains tasks Gives ideas	Describes appropriate leadership style Prepare arguments and presentation	Partner or group work
4 min	Presentation Part 4	Performance evaluation for older employees Rewarding system for employees 50+	Frontal	Listening and taking notes	Plenum
7 min	Exercise 4	Creating cafeteria benefits plan for employees 50+	Explains tasks Moderator	Writes down types of compensations	Single work Plenum
15 min	Case Study		Moderator	Writes down ideas & discussion	Group work
1 min	Time buffer				

2. Explanations for the classroom

The module is estimated to last 120 minutes. This module represents organisational behaviour 50+, more precisely it relates to organisational culture, motivation, leadership as well as rewarding system and performance evaluation of older employees.

After providing short overview of learning objectives (superior and subordinate ones) and content of the module, trainer starts with presentation providing definition of organisational or corporate culture, providing its main characteristics and attributes. In continuous, trainer focuses on different types of organisational culture, presenting external adaptation and internal integration, expressing their main characteristics according to the relevant literature. This represents the starting point for the later part of the presentation, when trainer correlates proposed literature and theoretical framework with practical internal integration of employees 50+ within their organisations.

Trainer explains that theory recognises different types of organisational culture which are adopted within various organisations. However, the most widely used approach for classifying organisational culture is the competing value framework (CVF), which is presented at the slide below. Trainer starts explaining this framework providing overview of X and Y axis and four different types of organisational culture which are results of their different combinations. During presentation, particular types of organisational culture (clan culture, hierarchy culture, adhoracy culture and market culture) are explained and in the same time trainer invites participants to think about characteristics of their organisational culture.

After providing CVF framework, trainer focuses on employees 50+ and presents characteristic of older employees' process of internal integration. The emphasize should be put on older employees' mentoring role, "reverse mentoring" and possibilities for employees in transition.

Emphasizing characteristics of older employees leads trainer towards definition of subgroups, especially those related to age differences, explaining crucial generation differences, distinguishing them among Younger Baby Boomers, generation X and Millennials or Generation Y.

In the next phase of Module 4, trainer explains exercise 1 and takes the role of moderator. Trainer invites participants to find the culture quiz within their workbooks and suggests them to carefully read the questions and suggested answers. The quiz contains 12 questions about organisational culture within participants' organisations. Participants need to read questions and chose one answer (by each question) which is the most relevant to the situation in their organisations. Participants need to fulfill the quiz within the next 5 minutes. After finishing, trainer provides instructions to find personal score; each participant, within the next 2 minutes, counts personal answers and depending about the structure of his/her answers (mostly A's, B's or C's) finds own score.

Trainer moderates discussion in and invites few participants to discuss their own score and compare it to other participants'. The main aim of this exercise is to provoke participants to think about their organisational culture and compare it to the quiz score, expressing their expectations and reality.

In the final step of this discussion, participant need to recall theoretical CVF framework and situation within their organisation and to choose the most appropriate type of organisational culture explaining its most specific characteristics

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Exercise 1.

- The culture quiz: How high does your company score?
  - Answer the questions provided in the workbook.
  - Find your score!

- Questions for discussion:
  - Compare and discuss your score to other participants' score.
  - Are you surprised/satisfied with your score?

  - What do you think, what is the type of your organisational culture according to CVF?

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During the slide show presentation about motivation and different motivational theories the participants could take the notes. Those notes could be useful for the exercise 2.

As the introduction to exercise 2, the trainer presents the research results about motivational factors of employees 50+. In the exercise 2 the participants should define motivational factors that could be relevant for employees 50+. The trainer encourages participants to discuss, comment and exchange thoughts about this issue. The knowledge from different motivational theories should be joined as well as the experience of participants. In the learner's book there is a space for the answers on this question. When discussion in the plenum is finished the trainer has a moderating and guiding role.

The next topic is a leadership. The trainer presents the definition of leadership and leadership styles as well as different classification of leadership styles.

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

In the context of leadership, the main focus is on work characteristics of employees 50+ that should be considered in the process of choosing appropriate leadership style. During the presentations participants should take notes that could be useful for the next exercise.

Exercise 3.

Discussion.

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?

In the first step of the exercise 3 the participants should list the work characteristics relevant for employees 50+. According to those characteristics they should propose the appropriate leadership style for those employees. In this exercise, the trainer encourages participants to share the knowledge, ideas and experience. The second step in the exercise 3 is to join the knowledge about motivation and leadership styles. Here the participants should explore which motivational factors should be included in the leadership style choice. In the learner's book there is a space for the answers on this question. When discussion in the plenum is finished the trainer has a moderating and guiding role.

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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).

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Today cafeteria benefits plan is very popular among employees. For employees 50+ this kind of benefits are interesting due to their different and specific needs. The cafeteria benefits play could be significant motivational factor for these employees. So, it is important to define what types of compensations the employers could offer to employees 50+ within cafeteria benefits plan. The exercise 4 is related to this. The participants answer the question: What compensations would you include in cafeteria benefits plan for employees 50+? The discussion about this topic is needed. In the learner's book there is a space for the answers on this question.

3.   Reference to employees50+

According to generation differences, there is different understanding of organisational culture and behaviour within the organisation, when it is about younger and older employees. Each of these generations have different work habits, ethics and different type of skills, primary those technical and communicational ones. Also, there are significant differences in the way generations view certain dimensions of organisational culture. In this sense, Generation X is characterized as more cynical than Generation Y, who are more positive, optimistic and somewhat idealistic about the working world. Employees 50+ believe in the importance of paying attention to details and the orientation towards outcomes and supportiveness (more strongly than younger employees). They also express stronger identity towards their organisations. These findings definitely confirm the willingness and importance for employees 50+ to be included in the mentoring process.

Although there are many stereotypes about employees 50+, especially in direction of their ability, performance, motivation and change acceptance, the fact is that there is an increase in the percentage of employees 50 + in many companies. This fact demands, in the context of work motivation, that these employees should be observed equally and fair comparing to younger employees. The theories that are observed as relevant for understanding the motivation of employees 50+ are Maslow theory, Herzberg theory, Goal setting theory and Expectancy theory. The postulates of these theories could be used for motivation enhancement of these employees.

Regarding leadership style, it could be stated that there is no best style of leadership for employees 50+. Successful leaders are expected to adapt their leadership style to different subordinates' characteristics and needs, as well as particular situations. In their work life, older employees have probably experienced many different leadership styles. According to their work characteristics, they need a task oriented leadership style. This style could inspire employees 50+ to achieve the full production potential in modern workplaces. The elements of task orientation can be found in authoritative, democratic, produce-or-perish management, team management and transactional and transformational leadership.

In the context of rewarding, it is important to note that different employees have different needs. What is even more important, individual needs change over time and require an adaption of rewards. These fluently shifting needs can put one under pressure of choice. The model for the proposed system here is the cafeteria benefits plan. Besides the regular base pay, older employees can receive incentive payments, bonuses, benefits, etc. This can be further monetary rewards, pension plans, medical insurance, flexible scheduling, more vacation time and child or elder care. Here, it is important that employees have the possibility

of choice. This plan allows employees to tailor their benefits to their own needs and interests taking into account their family status and private life. Equally, cafeteria compensation increases the quality and diversity of available rewards for the employees.

Finally, the evaluation of older worker's performance in comparison to younger workers can raise a human right consideration. In the beginning, older employees should have the same opportunity in improving their skills and abilities, as younger generations have. In order to meet adequate performance objectives, older workers should receive fair performance measurement standards in the same way as younger colleagues. Performance objectives for older employees cannot be applied always under the same circumstances (e.g. when it comes to physical work). Performance is influenced by an employee's age. What is important is the fact that older workers are as motivated as younger workers to contribute to the organisation's performance. Other issues that can increase the productivity of older employees are the application of age-specific workplaces, specific jobs and aged-mixed working teams. Aged-mixed working teams are associated with significantly longer employment durations of employees 50+.

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MODULE

Knowledge and Information Management

5

Trainer guide: InCounselling50+

Name of Module	Workload	Handbook	Workbook
5. **Knowledge and Information Management**	120 min	p. 89	p. 77

Learning Objectives

At the end of this course, participants 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.

Participants 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 independently and effectively acquire, 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

1. Lesson sequence

Time	Sequence	Content	Trainer activities	Learner activities	Social forms
5 min	Ice-breaking Exercise 1a	Brainstorming of the understanding of knowledge and crucial elements of knowledge management	Explains introductory task	Brainstorm own knowledge, awareness, attitudes	Single work and plenum
4 min	Presentation	Learning Objectives and Overview	Frontal	Listening	Plenum
8 min	Presentation Part 1	The importance of knowledge in an organisation	Frontal	Listening and taking notes	Plenum
10 min	Presentation Part 2	Knowledge management in organisations	Frontal	Listening and taking notes	Plenum
10 min	Exercise 1b	Discussion of brainstorming and presentation part 1 and 2	Explains task, gives ideas, make notes/sum up	Brainstorms own knowledge, awareness, attitudes	Single work and plenum
2 min	Presentation Part 3	Locating knowledge within an organisation	Frontal	Listening and taking notes	Plenum
10 min	Exercise 2	Group work	Explains task, gives ideas, make notes/sum up	Works in group brainstorm own knowledge, awareness, and attitudes during the group work	Group work

5 min	Knowledge securing of Exercise 2	Bring together results	Moderator	Active contribution, sharing, reasoning and disproving opinions	Plenum
4 min	Presentation Part 3	Continuing the topic: Locating knowledge within an organisation	Frontal	Listening and taking notes	Plenum
8 min	Presentation Part 4	Acquiring, creating, developing and transferring knowledge in an organisation	Frontal	Listening and taking notes	Plenum
10 min	Exercise 3a	Group work of knowledge transfer and dissemination information as well as its frequent use inside the company	Explains task, gives ideas, make notes/sum up	Brainstorms own knowledge, awareness, attitudes	Single work
10 min	Exercise 3b	Discussion of results	Moderator	Presenting and reasoning opinion, bringing up counter-arguments	Plenum
4 min	Presentation Part 5	The use of knowledge in the organisation	Frontal	Listening and taking notes	Plenum
2 min	Presentation Part 6	Using technology to enable a sustainable knowledge securement	Frontal	Listening and taking notes	Plenum

20 min	Exercise 4a and b.	Working out arguments and discussion of personal experiences in technology tools implementation in organisations	Explains task, gives ideas, make notes and sums up	Works out arguments and ideas, And presents/defends them during the discussion	Single work and plenum
10 min	Presentation Part 7	Preservation of knowledge in an organisation	Frontal	Listening and taking notes	Plenum
8 min	Time buffer				

2. Explanations for the classroom

This section is realized in 120 minutes. The topic is information and knowledge management in organisations and in the personal life of individuals.
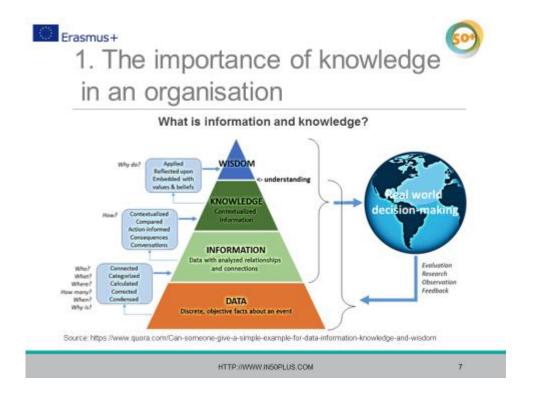
The classroom starts with an introductory exercise. It serves, on the one hand, as an ice-breaking activity, and on the other hand to introduce the topic. It is based on the participants' prior knowledge. The trainer gets to know the learner's knowledge level and, simultaneously, raises participants' awareness for the topic.

Before the presentation of the implementation steps and elements of knowledge management, the trainer asks participants about their opinion what is most important in the process of knowledge management. In this brainstorming exercise the trainer needs a board or a flipchart and pens to write down most important results. This activity demonstrates an anchor for the presentation parts 1 and 2.

Then, the trainer presents the importance of knowledge in organisation and in society. The differences between data, information, knowledge and wisdom e.g. based on the "knowledge pyramid" are presented with the following slide:

Step 1: To emphasize the importance and relevance of knowledge

It is very important to present the knowledge categories, especially the division between explicit knowledge and tacit knowledge. To understand the meaning of tacit knowledge in the planning and implementation process of knowledge management is especially beneficial for organisational sub-processes, e.g. knowledge location, knowledge development and transfer, exchange of knowledge, preservation of knowledge.

It needs to be underlined that tacit knowledge is a kind of individual knowledge. It is acquired and enhanced along with experiences. Its implementation serves the organisation depending on willingness of individual employees.

The trainer presents and describes all knowledge management steps, presented in the following two slides. And afterwards encourage learners to express their opinion and share the experiences connected with selected steps of knowledge management in practice.

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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
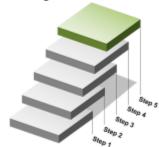
- **Important question:**
  How to disseminate information or knowledge and to ensure its frequent use inside the company?

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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?

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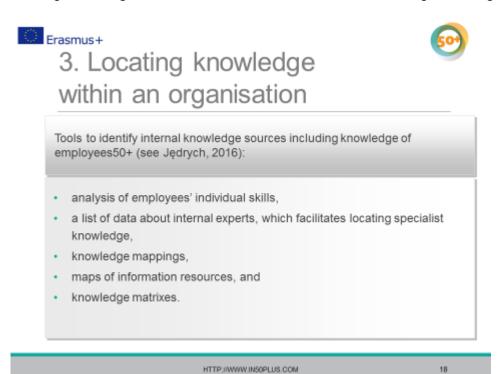
After the presentation of part 1 and 2, the brainstorming results are recaptured and connected with the presented content. In this Exercise 1b participants are supposed to disuss their results under consideration of the presented theory.

Then, presentation part 3 starts with a brief input and Exercise 2. For Exercise 2 the trainer divides the course participants into groups of 4 participants; 2 HR and 2 counselling practitioners He/She asks the participants to talk about what tools for locating knowledge they use or recommend. Tools that are used in the organisation to locate, identify and note down the inner sources of information. Then the trainer sums-up the exercise and writes down the results on the blackboard/flipchart. Afterwards, the trainer presents a list of selected knowledge locating tools and describes every tool.

The list of tools is presented in the slides, e.g. the following one and is "open". This means, to locate knowledge in an organisation depends also on people's creativity who create the locating tools and methods. Exercise 2 aims to promote participants' creativity in scope of locating knowledge and fill the tools and methods list for locating knowledge.

Step 2: How to acquire, create, develop and transfer knowledge in an organisation

The trainer presents formal and informal methods of knowledge acquisition and development. In this context, participants are encouraged to discuss ways of knowledge creation and development, especially for employees50+. With regard to this Exercise 3 is established. The same groups shall get together and answer the given questions and find further arguments and counterarguments for specific tools and methods to transfer knowledge.

4. Acquiring, creating, developing and transferring knowledge

Exercise 3b. Discussion

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

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This discussion aims to emphasize the potential of employees50+ when it comes to knowledge management. Through the discussion (Exercise 3b) common knowledge and experiences can be exchanged and new perspectives and possibilities can be found.

In this context, knowledge creation processes and attributed roles of employees50+ should be explained, esp.: an in-house consultant, expert, benchmark prospector.

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.

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Other important processes of knowledge management are knowledge transfer and diffusion. These processes should be described in the classroom. The trainer should present ways of organisational knowledge transfer and development like „expert groups", „Oxford-style debates", thematic conferences, informal meetings. The content for this can be found in the handbook. Moreover, employees'50+ roles (mentor, in-house teacher, distributor (diffuser) need to be explained and characterised.

To create other tools and mechanisms that support knowledge transfer in the company and that encourage employees50+ to transfer knowledge, participants are asked to work in a group. In scope of Exercise 3a and 3b these roles can be discussed and reflected from several points of views.

Based on this Exercise 3a and 3b participants of all groups prepare recommendations to realize the process of knowledge transfer in a multigenerational organisation (esp. mentoring, intermentoring). In this Exercise, the trainer refers to the knowledge and experience of the participants and complements this knowledge (like in Kolb Cycle).

The course participants share their opinions. The trainer notes down the ideas and in the summary, he/she says that it is of great importance for all employees to have access to information. The ways of knowledge dissemination can be e.g. taking part in discussion groups, professional conferences, work and team groups, Oxford debates and creating reports to share them with others.

Step 3: The use of knowledge in the organisation

The trainer should indicate that one of the most important elements of knowledge management is its effective use. It is important to describe this step and emphasize what roles employees50+ play in such process. This can be for instance the role of a human repository, a referee or a juror. To characterise this roles the trainer can re-read them in the trainer guide.

Step 4: Using technology to enable a sustainable knowledge securement

The trainer presents the information technologies (IT). In the slide, it is also explained how an expert system referring to an advisory system, a critising system and the system of making decisions without human control. It can be further exchanged and reflected how knowledge management can be supported in the organisation. Moreover, participants can share experiences about the implementation and use of technology tools under a special consideration of employees50+. Additionally, associated challenges and obstacles for implementing age-friendly knowledge management tools should be addressed.

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6. Using technology to enable a sustainable knowledge securement

Exercise 4.

a. 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?

b. Discussion

Bring together the results.

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The last Exercise 4 consists of two parts. Exercise 4a is a single work and addresses the prior mentioned topics of technology tools for knowledge management, and age-friendly knowledge management tools. First, participants list most crucial experiences, findings and arguments. Second, in Exercise 4b participants exchange about their experiences. Depending on the amount of time, more questions can be prepared and first discussed in small groups. Afterwards, results are brought together in the plenum then.

However, if the proceeds as planned, Exercise 4 consists of single work and an exchange in the overall plenum.

Step 5: Preservation of knowledge in an organisation

The preservation of organisational knowledge is presented. How to store and secure information and knowledge in an organisation is cocnretized. In this context, it can be additionally explained how to organize a functioning alumni community.

3. Reference to the subgroups

All actions directed at employees referring to knowledge management concern employees in every age groups. In this context, it's worth to emphasize, that employees 50+ and employees in transition can play a very important role in this process.

Employees50+/ Employees50+ in transition to retirement

People 50+ are experienced individuals (in terms of their life and professional experience). They have large deposits of both, explicit knowledge, which they have acquired during the years of their functioning in the organisational structures of their company, as well as of the extremely valuable tacit knowledge, which is translated into efficiency their work, competence, intuition, ability to solve problems and face difficult situations. In so far as their explicit knowledge is possible to be codified and shared with other employees, their tacit (hidden) knowledge is an individual potential of each individual employee. Therefore, it is only up to that employee whether he agrees to use it for the objectives of the organisation and share it with other employees. In case of the 50 employees, it is particularly important, as they may plan to retire in the not so distant future. Hence, if a company does not take proper care of preserving their knowledge, it may be irretrievably lost. In particular, it relates to tacit knowledge, which is sometimes so natural, intuitive, or even habitual that the employees themselves may not be aware of having it. In this context, an important role in an organisation is played by people who are responsible for building organisational culture and strategy of knowledge management (managers, HR workers).

While implementation of the process of knowledge management one should remember that its every stage is extremely important and in every step employees 50+ should be involved. HR specialists should take care of adequate planning and implementation of every stage in order to guarantee the success of the completion of the whole process. Starting from locating the knowledge in an organisation, that is diagnosing the knowledge potential of the individuals and of the organisational knowledge of the group. Once we have diagnosed the knowledge of resources in the company (esp. potential of employees 50+), it will be possible to determine the deficits of knowledge and plan the strategies of getting knowledge from the outside. On the other hand, knowing what knowledge we already have at our disposal it is easier to plan the subsequent development and the process of transferring and handing over the knowledge (to employees, organisational units which currently do not have it at their disposal). On this basis it is possible to plan the entire system of the organisational learning, intelligently using new technologies. To make the whole process effective it is important – apart from locating, recruiting, developing, transferring the knowledge, the organisational
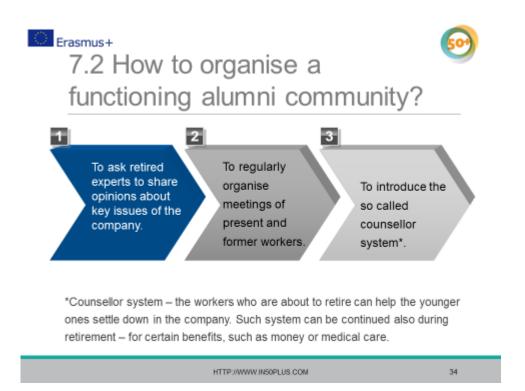
learning – store the knowledge in the organisation. This way it will be prevented from the loss of the acquired potential (in particular of the employees 50 +). If some of the stages are omitted or planned and implemented in a false way we will risk the success of the whole process of the knowledge management. It's very important to remember about specific roles that could be played by employees 50+ on every of knowledge management steps.

One should also emphasize that all employees have some kind of knowledge at their disposal. They are generating it and keep it in their minds, and express it in the organisation by their behaviour or the ability to deal with work challenges. It is very important to take care of it to make the employees willing, ready and open to use their knowledge for the realization of the organisation objectives. The appropriately created atmosphere at the workplace may be of help here and persons such as managers and HR specialists are responsible for it. It is not sufficient to just apply mechanisms being aimed at acquiring the knowledge by employees (e.g. training sessions for employees, workshops, conferences etc.). One should also take care of the knowledge assimilated by employees to be used in the company and handed over to other employees. It depends on one hand on the willingness of the employees who have the knowledge and on the other on the chance and space which can be created by HR specialists. In this context, it is very important to encourage employees 50+ to share knowledge. To make it possible, employees 50+ should feel appreciated by managers. Managers should care about reducing the employees 50+ fears connected with lost of advantage/ dominance (connected with their knowledge and experience) in the company. This fear very often is due to afraid of their position in the company (in comparison with younger employees). A very important task which stands against HR specialists is to encourage the employees for changes. In particular, quite a challenge will be to encourage the employees 50+ to be opened for changes. In this case, it is worthwhile showing them the benefits from possible changes and indicating in practice that changes can have a positive effect on their careers.

In the process of knowledge management very important is securing knowledge and their preservation. This is a very important task, especially in case of employees in transition to retirement. The process of mentoring and intermentoring should be very carefully implemented in an organisation. Very important is to encourage employees in transition to retirement to join to alumni community (after retirement). The process of preparing them to the role of e.g. counsellor should be started during the transition o retirement process.

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7.2 How to organise a functioning alumni community?

1 To ask retired experts to share opinions about key issues of the company.

2 To regularly organise meetings of present and former workers.

3 To introduce the so called counsellor system*.

*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.

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Jobseekers50+

Knowledge determines both the success of the organisation, as well as of the individuals – it constitutes a professional potential of each of us. Career counsellors who cooperate with the unemployed 50+ and the job seekers 50+ should make their clients aware how important knowledge is – also in the context of competent usage and presenting (e.g. in the course of conversations with employers) and how significant it is as far as the competitiveness of employees and the job seekers is concerned. A career counsellor should aspire to diagnose the resources of knowledge, ability and competence of his/her client. This may be implemented by formal and structured methods, such as among others diagnostic tests e.g. tests of knowledge, tests of competence, or aptitude tests. Less formal tools can be of help here e.g. an interview, conversation with a client during which it is possible to ask him/her about the resources of professional knowledge and self-assessment that concerns their knowledge or abilities (e.g. in the range of an active job-hunt, preparation of application documents, presenting oneself during an interview). On this base diagnosing possible gaps is possible, alongside with the indication of the areas for the individual development and the follow-up work with the client.

It is also significant to make the clients aware of the fact that the process of learning is important due to the dynamically changing and requiring labour market. There exist both formal and informal methods of increasing one's knowledge. The unemployed 50+ and the

job-seekers should be aware how important it is to constantly be updated with novelties concerning their professions, as well as with the new trends connected with the progress that regards work organisation (e.g. using new technologies at work).

The challenge for career counsellors is to convince the unemployed 50+ and the job-seekers to become open for changes – to find new alternatives, chances and opportunities (e.g. in the scope of acquiring of new knowledge and abilities). In this context, career counsellors could use similar recommendations like were presented for HR works (slides: 32, 33, 34).

MODULE 6

Introduction to Counselling 50+

Trainer guide: InCounselling50+

Name of Module	Workload	Handbook	Workbook
6. Introduction to Counselling 50+	120-180min	p. 114	p. 99

Learning Objectives

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

Participants 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

1. Lesson sequence

Time	Sequence	Content	Trainer activities	Learner activities	Social forms
3 min	Presentation	LOs, Overview	frontal	Active listening	Plenum
10 min	Introductory exercise 1	Bad case scenario, sensitization of most crucial counselling goals, elements, steps and content ➔ To establish a common understanding	Presents questions and exercise	Reflecting experience and own ideas: Profiling counsellor attitudes	partner work and plenum
10 Min	Bringing together results (knowledge securing)	Mind mapping HR and counselling understanding	Brings together results in mind map, moderator	Present results and comment other's results	plenum
6 min	Presentation Part 1	Counselling theories and procedure in context50+	frontal	Listening and taking notes	plenum
10 min	excursus reference to HR, exercise 2	HR counselling procedure Recapturing results from M3	Explains task & moderator	Brainstorm and present employees' and organisations' goals	Single work & plenum
10 min	Exchange about exercise 2	about differences in HR and counselling, establish a common	moderator	Discussers	plenum

		comprehension			
10 Min	Presentation Part 1 continued	Resuming own work tasks & counselling activities	frontal	Active listening and taking notes	plenum
15 min	BREAK				
10 Min	Exercise 3 Introduction for Part 3	A counsellor stereotype	Presents exercise and moderator	Develop a stereotypical HR/counselling practitioner	Counsellors prepare the HR PERSONA and vice versa (group work and plenum)
10 Min	Knowledge Securing and Exchange	Presentation of results and exchange	Writes down results in slide	HR and counsellor groups present the two PERSONAs	Group work, plenum
5 Min	Transition from exercise to input	Comparison of PERSONA and theoretical counselling skills	frontal	Active listening and taking notes	plenum
20 min	Presentation Part 3, 4 & 5	Counsellee & Reflection & Evaluation	frontal	Active listening and taking notes	plenum
18 min	Preparation Exercise 4	Preparation of case and role cards	Explains task, supports case formulation	Preparation of case, doing the role-play (5min each round) & improvement potentials	single work

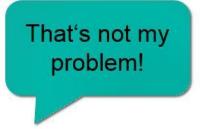| 30 min	Presentation round	Presentation of own cases	moderator	presentators	plenum
13 min	Time buffer				

This lesson can also be realized in 120 minutes. In this case, exercise 2 and 3 are not done and instead are given as homework or as exercise for the self-study phase. **Practical orientation in classroom**

2. Explanations for the classroom

This section is either realized in 120 or 180 minutes depending on the amount of available time. For instance, if a group has an extended prior knowledge base, more focus can be put on this module. If participants are more interested in details of employer duties, motivation, organisational behaviour, or knowledge and information management, this sequence can be shortened. The lesson consists of four theoretical parts: the counselling theory in general, the

I don't want to be here.

That's not my problem!

counsellor, the counsellee as well as the reflection and evaluation of counselling.

Overall, there are four exercises. Exercise 2 and 3 can be sorted out for the shorter sequence of 120 minutes. The introductory exercise 1 serves to establish a common understanding of counselling between HR and counselling pracititoners. This introductory worst case is given. Based on this, participants should brainstorm what counselling means to them, as well as crucial elements, steps and content. In this exercise they should refer to their own work activities. The trainer collects the results in a mind map or list to compare and clarify the results afterwards. This task has the aim to bring the groups together, so they get to know each other. At the same time, this shall avoid later misunderstandings. It can be assumed that preconditions, procedures and structures of counselling differ profoundly in HR and in counselling organisations.

The following input is rather theoretically based and provides an overview of counselling theories, procedure, approaches, interventions and the paradox. It is more addressed to counselling practitioners and shall serve as a base for further improvement. Simultaneously, HR practitioners understand better the counselling practitioners' view of counselling practice. However, it is necessary to address also HR practitioners counselling activities.

The project's own interview results stated that HR practitioners do not carry out long and frequent counselling processes, but rather have a mediator role and try to clarify goals and an action plan in one conversation. This is why, in this section the entrepreunurial-oriented exercise 2 can be embedded. After the explanation of a counselling procedure, the content can be related to counselling in HR. The exercise is supposed to discover the most crucial

element: one or more commonly agreed goals between employee and employer. In the HR context, these are goals that go along with the individual interests and desires as well as the enterprise's values or strategy. For this, the exercise 2 of module 3 can help to recap expectations and characteristics of the own employees50+.

Therefore, they should hypothetically formulate an employee's50+ goal. In a second step, they shall check whether this goal is equivalent to an enterprise's goal. The third step helps to align both goals and how it can be fostered.

This is the basis for all counselling. To establish a common set of goals helps, first of all, to clarify expectations. This is the basis for all further action taking. Since from common goals and transparent expectations, clear action plans can be derived.

	Employee's goals	Equivalent enterprise goals?	How to foster the goals?
1.			
2.			
3.			
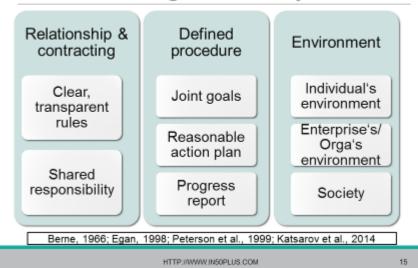
After each of the four parts there is a summary of the most crucial aspects of a counselling process. This is based on the theoretical input and can serve as an orientation on what to focus in counselling. As the summary and the evaluation criteria are theoretically based, it serves as a base for further improvement and adaption for the participants' own use. The overall summary of the criteria are provided in the learner's workbook.

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2. Counselling: Summary

Relationship & contracting	Defined procedure	Environment
Clear, transparent rules	Joint goals	Individual's environment
Shared responsibility	Reasonable action plan	Enterprise's/ Orga's environment
	Progress report	Society

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

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The third part about the counsellor starts with exercise 3, which is optional. Exercise 3 is similar to the introductory exercise 1. It aims to reflect stereotypes, actual skills and attitudes towards the HR and counselling workplace. Therefore, two groups are build. One group are HR practitioners, the other group is represented by counselling practitioners. The exercise is to design a stereotypical counsellor (PERSONA) of the other group with the most important tasks, skills, attitudes and characteristics. This means HR practitioners design a counselling practitioner PERSONA and vice versa. Participants shall use the template in the workbook for the exercise.

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

This is a continuation of exercise 1 and goes more in-depth. The PERSONAs are presented in the plenum afterwards. The trainer collects the most crucial results in a slide and guides

clarifying comments and questions.

In a second step, the trainer relates the results to the theoretical concluded counsellor skills and attitudes. In relation to this it is important to sensitize participants that counsellors' perception is also subjective. For this, a video is shown. The video serves usually as an anchor for selected perception and raises awareness that one perceives, what he or she focuses on.

At the same time, this video allows a smooth transition to the last part of reflection and evaluation. This last part is focusing on the input without any exercise.

The final concluding exercise 4 takes place at the very end of the lesson. The final exercise is a Case Study with role cards. The role cards cover all three perspectives of the counsellor the counsellee and the observer.

	Experience as a counsellor	Experience as a counsellee	Experience as an observer
The counsellor's - Active listening - Empathic - Encouraging and empowering			
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			

Groups of three get together, agree on a problem definition and carry out a role-play. The role-play is done three times so that every group member can take each role once. The three roles are counsellor, counsellee and observer. Each role has a role card with certain instructions and questions, on which the role focuses during the role-play. The cases are

provided from project members and are adapted and anonymized real life situations. The cases refer to the single subgroups of employees50+, employees in transition to retirement and jobseekers50+. In this way, both HR and counselling practitioners can present difficulties of own counselling requests and make the other peer understand better crucial problems and difficulties. Thus, awareness can be raised towards actual issues, which have to be focused on.

After the role-play, each group presents briefly the case, as well as difficulties and conclusions with the roles. Then the case is discussed in the plenum. Others give their opinion and possible further solutions.

3. Reference to the subgroups

Employees50+

Besides the individualized cases, the input gives several connection points to the individual subgroups. In this context, the above shown slide relates to employees50+. In scope of this the introductory brainstorming of Module 3 is recaptured. What are employees'50+ needs and goals? There might be different perceptions due to distinguishing enterprises and organisations, and different representatives of the target groups. This means, that counsellors might perceive employees50+ as anxious, because such counsellors are specialized in this area and treat more individuals with anxiety.

This can be also the ground of a discussion to **sensitize** each participant group **towards potential clients or employees**. This is mutually beneficial, because counsellors draw a picture of their clients who are potential employees. In contrast, HR practitioners explain needs and goals of their own employees, who might be future clients of counsellors. Future clients are not only jobless people, but also retiring individuals and those, who want to stay active after retirement. Through this exchange, a more detailed understanding and picture of individuals50+ can be collected and concluded.

In scope of employees50+, specifically the **empathic attitude** of a counsellor has to be pointed out. This is of particular importance, since the intrinsic and emotional motivators are becoming more important over age. At the same time, older people over 50 are becoming

more heterogeneous. Thus, through the exchange of both practitioner groups, the empathic attitude can be subtilized responding better to more heterogeneous and more emotional driven employees50+.

Employees50+ in transition to retirement

In vocational counselling most frequently decisions about professions, joblessness or job search are issued. Gradually, more and more counselling of transition upon retirement or of activity after retirement are addressed. Due to a longer and growing life expectancy of European citizens, the activity after retirement becomes more and more important.

Especially for this subgroup of retirees, it is important to extend the counselling definition. As explained in module 3 for employees in transition to retirement, it is important to reconsider various **age concepts**, the **activity after retirement** and the **mental preparation** for retirement.

To reconsider these three aspects, specifically occupational knowledge needs to be adapted for employees in transition. Awareness of **occupational knowledge** is crucial for a counsellee's progress. In scope of this knowledge, especially future life roles, goals and expectancies have to be covered in counselling consultations as well. As a competent counselling practitioner the focus lies upon empowering and encourageing the counsellee towards an independent progress. However, the topic transition processes shall not be overemphasized, but neither underestimated because upcoming life changes can be severe, but individuals shall not be frightened of the topic. In addition, it is not urgent for the counsellee to know the later life goals and life roles at once, but rather be aware that changes come along.

It is especially the task of HR and/or counselling practitioners to support the individual50+ to find an **optimal transition model**. The individual should be aware that the transition into retirement can be profound and can go along with severe-perceived changes. As in HR the entrepreunurial strategies and goals have to be considered, the task within HR lies upon a personal appropriate solution while meeting all participants' needs. An enterprise's needs are mostly knowledge securing and management before an employee retires.

For both practitioner groups, it is crucial to listen actively what has been spoken and what not. As pointed out in module 3, some individuals50+ have problems to self-appraise themselves, and thus their own needs. It might be that a counsellor needs to sensitize the employee for another disfavored solution, and therein show the employee his or her biased self-estimation. In this context, a reference to module 3 about self-regulation can be done.

Since individuals50+ have in particular problems to self-appraise and to adapt to new and unfamiliar situations, mental preparation and the training of coping skills can be helpful.

Mental preparation as well as the training of coping skills are a key that can promote **reflection and self-awareness** of individuals50+. As said, it can foster the adaptation in new and unfamiliar situations. The theory of self-awareness serves as a background. The more aware people are, the better they can appraise and control own behaviour and attitudes. As was shown in module 3, especially change and new, unfamiliar situations encourage doubts and insecure performances. To confront clients or employees regularly with uncommon situations, can train them to cope and master better those unfamiliar situations.

Even so, it can be already useful to train **reflection techniques** with them. A counsellor always has to make sure that reflection contributes to the overall goal and action plan. This is why the topic reflection in this context is defined as outcome-oriented. Regardless, some may ask for the goal of people in transition processes. The answer is clearly that the goal is to promote and encourage self-awareness and self-appraisal combined with **coping skills** for new and unfamiliar situations.

Jobseekers50+

This applies equally to employees in transition to retirement as well as to jobseekers50+. Anyways, for jobseekers50+ the goal of counselling might be different. In order to reintegrate them, the training is not only about own future life roles' reflections, but the issue how to stay competitive on the labour market.

Mostly counselling practitioners support jobseekers50+. In this context, the most crucial topics are negative stereotypes associated with joblessness, changed work conditions for those who are not experienced with joblessness, and the own underestimation. All the topics have been explained in the section of module 3, to which a counsellor can respond with encouragement and adequate trainings. Anyways, in counselling it is crucial to listen actively to the said and unsaid things. To explain active listening, the module's content is cited (handbook module 6, p.4):

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

1.   To listen and understand carefully the verbal core message

2.   To observe and read the nonverbal behaviour (e.g. body reaction, facial expression, voice-related behaviour, physical characteristics)

3.   To listen to the context (social surroundings and other environments)

4.   To listen to sour notes (a client's potential challenges).

Active listening encourages a client and releases motivation and engagement in the counselling process. Attentive listening and empathic reactions encourages clients in consultations and gives them comfortable and stabilizing feelings (Schulz, 2014). As a result, more individual doubts and issues can be clarified and choices are made in a more sustainable manner (Savickas et al., 2009).

It can be resumed that active listening is one of the most important, if not the most important competence for a counsellor. This is why, active listening is going to be integrated in this module's 6 exercise 4 of role plays.

Besides this, two framework conditions have to be kept in mind. First, the overall goal regarding consellees and employees is to ensure successful ageing by the promotion of maintenance of activity and an independent lifestyle. Second, as jobseekers50+ face special circumstances, the counselling paradox is highly relevant in the context of joblessness. The special circumstances for jobseekers50+ are caused in the negative stereotypes some of the enterprises having about the elderly and the preference to hire younger arising therefrom.

Anyways, to become jobless short before retirement affects often no or low qualified people. Thus, it is more complicated for them to find work, as this group mostly carries out physically demanding activities, which additionally speeds up physical decline and limitation. Moreover, affected people50+ do not have high incomes and in case of joblessness they need to take recoursed savings, which they put aside for retirement.

As a result, typical jobless50+ experience high pressure to find a job again, in order to ensure financial security and to avoid age poverty.

In this module 6, it is one aim to **mediate** HR practitioners which problems counselling practitioners are confronted with. In this way, it is possible for HR departments to establish and optimize ageing and/or age-friendly recruitment as well as onboarding processes.

Recruitment and later onboarding are possible connection points with jobseekers50+. Even so, there might be revealed insights, how dismissal processes of individuals can be designed smoother and more agreeable for all participants. Meaning to consider jobseekers'50+ opinions for the design of age-friendly recruitment and onboarding.

Again, a special consideration requires the **reactivation of housewives**. They tend to suffer from an extreme undervalued self-appraisal. It can be concluded that they are specifically sensitive to changes, and react with corresponding avoidance behaviour or devaluation of own performances. As a consequence, both HR and counselling practitioners need to carefully establish a moderate procedure for e.g. recruitment, onboarding or counselling progress.

MODULE 7

Peer
Counselling

Trainer guide: InCounselling50+

Name of Module	Workload	Handbook	Workbook
7. Peer Counselling	120 min	p. 142	p. 122

Learning Objectives

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

Participants 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

1. Lesson sequence

Time 65min overall	Sequence	Content	Trainer activities	Learner activities	Social forms
5 min	Presentation	Overview, learning objectives for Module 7 and third-follow up day	Frontal		Plenum
30 min	Task 1	Action Plan	Explains task and action plan	Fill out action plan for themselves	Single work
Optional: 15 minutes	Knowledge exchange	Discussion of action plan and potential obstacles and benefits	Moderator	Discussion about action plan; participants collect advantages and disadvantages	Plenum
5 min	Presentation	Procedure of peer counselling	Frontal		Plenum
5 min	Presentation	Of "homework" preparation of case	Frontal		Plenum
5 min	Closing	Thanking for participation, giving contact, finding a date for the third follow-up day and saying goodbye	Frontal		Plenum

Erasmus+

2. Explanations for the classroom

This module follows a methodological perspective. It does not cover content and is a strong practically-oriented session. As the session takes place during the first two days it is rather introductory and serves as a preparation. This is why the session lasts 65 minutes. Exercise 4 of module 6 integrates parts of the peer counselling and serves as an introductory exercise for this method. The discussion of the role-play equals the core steps of this counselling style. However, peer counselling aims to discuss real-life cases among the same peer. This is why, a detailed peer counselling round takes place in the third follow-up day.

To meet the individuality of participants, at the end of the second day personal goals are defined in a practice-oriented action plan. The plan sets the basis for the transfer into practice and provides a reference point for further reflection. The action plan and further reflections are discussed and brought together on the third follow-up day of the training.

The action plan ensures a successful learning process and participation during the follow-up day. For the action plan the following instructions and reminders can be given:

First, during the classroom, participants resume which training's objectives they want to overtake or translate for their own enterprise, their own practice. These are objectives participants feel most urgently to be improved. In the learner's workbook participants fill the objectives in an action plan. The action plan asks for the objective, and further how the success or failure will be measured.

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

Goal 3			

This activity serves to recapture the initially set goals, and allows an individualization, which ensures to meet enterprise's values and a realistic transfer process. Simultaneously, participants can set self-regulated learning goals. This means, they set goals that correspond realistically with own capacities, competencies and needs. To avoid overenthusiastic or underestimated action planning, the trainer can remind participants to use one reflection intervention.

After the single activity of filling out the action plan, there is a short input about the peer counselling procedure:

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

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

In a last step, the template for the case is provided and participants get the task to prepare a case at home for the third day.

As this module covers realistic cases, the specification is due to the cases participants bring along. This is why no further details are given on the three subgroups here.

There will be an aditional manual for this module 7, which concretizes mutual learning, e.g. mentoring, coaching or supervising. The manual introduces these learning styles and corresponding methods.

Trainer guide: InCounselling50+

Name of Module	Workload	Handbook	Workbook
Follow-up day Peer Counselling	300 min	p. 142	p. 129

1.   Lesson sequence

Time	Sequence	Content	Trainer activities	Learner activities	Social forms
5 min	Welcoming		Frontal		Plenum
15 min	Task 1	Action Plan Recapture	Explains task and moderates	Asking and reflection whether the goals have been achieved or not; Evaluation of potential barriers and benefits	Partner work
30 min	Task 2	Discussion of action plan and realization (if not discussed in the last day)	Moderator	Discussion about action plan; Retrospective evaluation of barriers and benefits	Plenum
10 min	Knowledge Securing	Detect and resume knowledge and know-how gaps	Supporter	Overwork action plan, resume future principles	Single work
10 min	Presentation	Declaration of mutual shared responsibility and respect	Frontal		Plenum
90 min	Peer Counselling Round 1	Realization of one peer counselling	Moderator		Plenum

		round			
90 min	Peer Counselling Round 2	Realization of one peer counselling round	Moderator		Plenum
20 min	Feedback 360°	Feedback, thanking for participation, and saying goodbye	Moderator	Giving feedback to trainer, to other practitioners of the same and the other group	Plenum

2. Explanations for the classroom

The third follow-up day takes place around eight weeks after the first two days. The session is calculated with five hours, four and a half hours for classroom and half an hour for break time.

The purpose of this third day is to collect and retain reflection that was provoked through the training's input and happened in practice. Equal to the prior modules, the mutual exchange of knowledge and experience between practitioners shall be enriching.

To create the third day beneficial, the exchange and discussions of experiences need to be prepared properly. A methodology that counsellors apply to improve own activities is peer counselling or colleague exchange. It is established among people with the same occupation with the same or similar activity field, who face sensitive or difficult individual problems. Colleague exchange can be described as follows (extracted from the handbook module 7):

Colleague exchange is not only about supporting others, but also about preparing the content and methods properly for new colleagues with other or low experience. Preparation requires the ability of self-organisation and a content's reflection to a certain degree. This, in turn, provokes a supporting colleague to process the content in another cognitive manner. Thus, exchange processes, on the job or in counselling, deal with the enablement of others' learning processes and with a counsellor's own learning.

Since peer counselling is a relatively new method, the structure is given. Also an input phase about respectful and empathic behaviour is given that states the ground of the peer counselling. Moreover, all data must be anonymized to stay conform to data protection

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regulations. Participants need to bring along their action plan and the prepared cases to participate successfully in the process of peer counselling.

Depending on the cases' contents, two peer counselling rounds can be conducted. There are two possibilities, to which all participants have to agree before starting with the counselling consultation. In the consultation, all participants can be either counsellors, or some can be observers. To give some participants observer roles allows a smoother peer counselling round. In general, a smaller group allows longer contribution from counsellors which usually goes along with higher quality. Nevertheless, to have observers of the counselling round makes the consultation less genuine. Meaning, that peer counsellees and counsellors are less open and are shy to bring up all ideas and suggestions. On the opposite side, if participants share a respectful attitude among others, the observers can give beneficial feedback after the round.

If the group is bigger than 15 persons and participants do not know each other, it is better to split the group. The alternative to have two parallel peer counselling rounds is especially useful, when the option for observants cannot be applied. To divide an entire group in two, gives the possibility to cover more cases and more interest fields.

No matter how the group size is, each round needs a moderator. The moderator ensures that the procedure is followed and that the time is not lost. In the end of the follow-up day an overall discussion and exchange round about future requirements in this area, and possible action plans is realized. In this way, the overall training, experiences and transfers into practice as well as the follow-up reflection can be resumed and summarized by each individual participant.

The 360° feedback serves to give everybody an overall feedback and appraisal from different perspectives. In general, the feedback shall cover, whether specific contents or questions were avoided or if there is a particular need for further orientation and information in an area. This is why, both practitioner groups, participants among others and the trainer shall comment this. Due to the different roles in the training, several views can be considered. Meaning that somebody who observes an exercise or discussion perceives things in another manner than somebody who participates in the activity.

Appendix 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

Module 1: Self-study Critical incident Succession planning

Name	-
Birth date and place / age	-
Residence	-
Highest educational qualification	-
Family status	-
Description of situation	Assume that you lose or have lost a key department manager on short notice […] (You can chose any department you wish.)
Problem definition	Who is ‚ready' to assume that position? Name anyone!
2nd problem definition	Imagine this case happens in 3 years. How would you react then?

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

Name	Mr. IVO IVIĆ
Birth date and place / age	59 years old, born in Zagreb
Residence	Zagreb, Croatia
Highest educational qualification	Elementary school, working as unqualified worker in manufacturing industry
Family status	Married, 2 children
Description of situation	He is married and lives with his unemployed wife in a small town near 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 definition	Mr. Ivić is facing decline in overall health and has developed a disease that has huge impact on his overall performance. How would you as an employer/HR practitioner proceed?

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

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?

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

Name	Mister Muster
Birthdate	xx.xx.1955
Residence	Hessen (western German state)
Highest graduation	Apprenticeship as a skilled technical toolmaker 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?

Module 4: Case Study 4 Age-friendly performance improvement

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.

Module 5: Case Study 5 Optimal knowledge management 50+

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?

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 re-educated 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 definition	Mr Beck wants to extend his work time. 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 a 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 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)?
	(How) Would you secure his know-how and expertise?

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: Instrumental learning 50+

Learning Nugget 7: Case Study 2 Age friendly onboarding (self study)

Module 4   Learning Nugget 8: Psychological contract

Learning Nugget 9: Six Emotional Leadership Styles

Learning Nugget 10: Case Study 3 Optimal encouragement for 50+ on the workplace

Module 5   Learning Nugget 11: Technology use of people50+

Learning Nugget 12: Learning strategies for information management 50+

Learning Nugget 13: Knowledge assessment of jobseekers50+

Learning Nugget 14: Case Study 4 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

Training Assessment

Dear participant,

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

Name of trainer	
Date	
Please cross your answers	☒ ☐ ☐ ☐
You participate voluntarily in the assessment.	

	Very good	**Good**	**Satisfactory**	**Adequate**	**Inadequate**
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
1. 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.	☐	☐	☐	☐
9. 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

	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 and SDC ☐

the SDC ☐

Please read the following statements and indicate your level of agreement by crossing the appropriate box.

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.	☐	☐	☐	☐

Part II (IO7)	Agree	Partly agree	Disagree	Can't tell
1. 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: