

Longer careers with the job life cycle model – guide to designing an age plan

Bjarne Andersson, Karoliina Haggrén, Kari Haring, Päivi Lanttola, Oili Marttila, Jan Schugk and Riitta Työläjärvi

Translation: Transpeter Ab

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The translation of this publication has been funded in part by the Department for Occupational Safety and Health of the Ministry of Social Affairs and Health.

1. Abstract: Workplace age plan - job life cycle model

Organisations that wish to be productive and promote occupational well-being should, in their development actions and operating models consider employee needs related to age and different life stages. The age structure of the employees should be seen as a resource. A considerate age perspective is not only beneficial to the employer but to the employees as well, as the opportunities to enhance occupational well-being during the different stages of the job life cycle improve.

The organisation defines development actions and operating models that take into account the employees' age and life situation on the basis its own needs and starting points, while taking into account the collective agreements applicable to the relevant sector. A separate age plan can be drawn up to cover development actions and operating models. It is also possible to add development actions that emphasise the age aspect to the organisation's existing programmes or plans, for instance the plans aimed at human resources, work ability, training or equality, the occupational health and safety programme or the occupational health care plan. Alternatively, the ways of working at the workplace may be adjusted in such a way that age as a factor is taken into consideration. In order to get good results, it is important that actions are planned methodically with a long term perspective and that the development actions and operating models correspond to the needs of the organisation and of employees of different age. It is also important that any proposed development actions are discussed with the employees and their representatives and that their execution and impact is followed and evaluated.

When drawing up an age plan and taking other measures that emphasise the age aspect, organisations can use the age plan model presented in this document. The model is called the job life cycle model, as all employees must be taken into consideration if the organisation aims to create an age plan that can help employees continue with their careers. A particular emphasis on the needs of a certain age group may be called for in view of the special characteristics of a job or the age structure of the organisation.

This age plan model is not intended for use as such in any organisation. It offers an information package consisting of different elements of the age plan. Each organisation must always separately consider their applicability to the needs of the organisation with a view of extending careers and gaining other goals. The organisation must also take note of legislation and applicable industrial agreements. With the aforementioned in mind, a study of the age plans of other organisations should be a worthwhile exercise. You should also read the literature and material on age plans on the Internet, for instance.

The age plan of an organisation must be based on sufficient information about the age structure and the related resources and opportunities of the organisation as well as its weaknesses and threats. On the basis of this information, it is possible to set targets for the age plan and later to assess how the plan has succeeded and to further develop operating models.

An age plan may contain development actions that emphasise the age aspect in management, that develop a supervisors' age management skills and an employees' work community skills from the age aspect. It is important to introduce and develop structures that support interaction between a supervisor and an employee on questions related to the needs of the organisation and employees of different ages. One such structure is the development discussion meeting, which should take place at different stages of an

employee's career. The topics may include, for instance, competence and development needs, the career and occupational well-being. Development discussions on career planning at the beginning of the career are particularly important in professions with a high disability risk. Towards the end of a career, development discussions should introduce the planning of the final years in working life, preparations for retirement and a plan to transfer knowledge and competence.

The organisation age plan model should also present ways of combining the needs of the organisation and of the employees with programmes for work management, work arrangements, adjustments of work and health checks as well as by promoting healthy habits and life management.

2. Introduction

On 13 October 2011 the employers and trade unions approved a framework agreement that the labour and industry representatives were to draw up a joint age plan model for industry, municipalities and government agencies. (Frame agreement item, Appendix 1)

A working group was appointed to prepare an age plan model. The group was chaired by *Jan Schugk* from the Confederation of Finnish Industries. The other members of the working group were *Bjarne Andersson*, Local Government Employers, *Karoliina Haggrén*, Confederation of Unions for Professional and Managerial Staff in Finland (Akava), *Kari Haring*, Central Organisation of Finnish Trade Unions (SAK), *Päivi Lanttola*, Office for the Government as Employer, *Oili Marttila*, Commission for Church Employers, and *Riitta Työläjärvi*, Finnish Confederation of Salaried Employees (STTK).

The agreement of the extension of work careers concluded on 22 March 2012 by the labour market confederations also mentions the age plan and individual career plans. (The agreement of the extension of work careers, Appendix 2). In addition to the age plan model already being developed, the agreement stated that organisations should make sure that age plans are applied at the individual level, for instance, through individual career planning. The plan should take into consideration the development needs of the job, such as work arrangements and flexible working hours, extending the career and the competence transfer, where applicable.

The working group has drawn up an age plan model, which includes

- a. elements concerning all age groups, not only the older employees,
- b. information and alternatives for drawing up and developing an age plan for an organisation.

The age plan is based on the starting points and needs of an organisation as well as on legislation and the applicable labour market agreements. It is natural to make the plan as a part of existing personnel and organisational development and related programmes. All elements mentioned in this model do not have to be included in the age plan of an individual organisation.

The age plan model includes elements from scientific studies as well as concrete age plans in use in various organisations. We recommend that organisations wishing to draw up an age plan begin the process by studying the literature on age plans and the material on the Internet listed at the end of this model, as well as the examples of existing age plans, presented below in chapter 7.

The investments made in the age plan should be related to their impact and to the productivity of the investment. Good age management serves the interests of both the employer and employees. It pays for itself by improving well-being at work and increasing productivity while reducing sick-leave absences as well as the costs arising from disability and health care. An age plan helps the organisation view employees of different ages as a resource rather than a burden.

3. Basics and goals of an organisation age plan

Age plans and age management have become a major concern in the past few years. The reason for this is, on the other hand, that the average age of the working population increases and the new becoming age groups are reduced in size, which affects the availability of personnel and, on the other hand, that we are consciously aiming to extend careers. With regard to the national economy, the fiscal sustainability gap, the pension system and the related payment burden, it is critically important that as many adults living in Finland as possible are able and willing to work, and that careers are greatly extended from the current average of 34 years. From an organisation's point of view, the age plan can decrease the pressure on increasing social insurance contributions, decrease personnel turnover and disturbances due to work interruptions, promote recruitment and, above all, improve the productivity of work. From an employee's point of view, age plans and longer careers improve the income level, make the work more meaningful and enhance the quality of life.

There are a number of positive and negative attitudes related to age. The negative aspects of becoming older, such as decreased performance and work efficiency as well as the discrimination, that older employees experience and their difficulties in finding employment, have dominated the debate on age management. The positive aspects have mostly been connected with younger people. Young people are seen as unprejudiced innovators who know information technology and whose entry into working life must be promoted even at the expense of older employees. From the point of view of working life and the careers of individual employees, such views are too generalised and may cause confrontations that benefit no-one. On the contrary, people of different ages should be seen as a resource that makes it possible for an organisation to succeed, when managed well.

Age management is part of good management and, above all, the management of work ability and occupational well-being, with particular reference to taking into consideration age, the different life stages and their special characteristics. The aim is to act in such a manner that work will become more meaningful for people of different ages. This also prevents disabilities and social exclusion, and there is an increase in the degree of participation, longer work careers and improvement in work productivity in Finland.

Another aim of the age plan is to help organisations see different age groups as a resource and to take advantage of the strengths of versatility. In practice, this means promoting co-operative skills in the organisation, accepting differences and managing workload factors related to different age groups with the necessary supportive actions and flexibility. This type of organisation is not created by itself; it is shaped in open debate and, above all, through management by example. It can be promoted with an age plan based on the needs of the organisation. One of the central goals of the plan is that matters related to age, life stages, work and career are regularly discussed with all employees of an organisation.

By using the age plan to promote age awareness as well as discussions on age-related matters and life situations, it is possible for an organisation to successfully meet the different age related challenges and to identify the need for age management and the opportunities that it offers. When work processes are well-organised, the risks are decreased and the basis of operations is strengthened and productivity, results and competitiveness are improved. The equal treatment of people of different ages and the taking advantage of competence make it possible for the organisation to get the best possible use of their human resources.

If an organisation wishes to establish an efficient age plan, the development actions must be derived from its own needs. The different parties of the workplace must participate in the making of the plan. The age plan should be made part of the organisation's other programmes related to human resource development and occupational well-being. The figure below is an example of the areas of occupational well-being that can be included in an age plan.



Figure 1. Areas of occupational well-being included in the age plan (adapted from TTK 2011)

4. Central areas of an organisation age plan

4.1. Age management

Age management takes into consideration the requirements arising from managing employees of different ages and the impact of age and life situation on work. In addition to the calendar age, age management takes into consideration, for instance, subjective and biological age, which carry different age connotations. Biological age means age based on physical condition and health, whereas subjective age depends on the person's own perception about his age. People of the same calendar age can be in very different shape and experience very different life situations. On the other hand, people with different calendar ages can subjectively experience that they are at the same phase in life.

In age management, it is important to detect and to take into consideration the needs of employees of different ages and with different life situations, differences in customs and communication cultures, the need to plan tasks individually, the opportunity to influence one's own work and working time, and the co-operation between the more experienced

and less experienced employees. Negative attitudes towards age cannot be tolerated in the workplace; they must be dealt with immediately.

Development of supervisors' age management skills

Age management is part of good management practises at an organisation. Age management means organising and managing work tasks of employees in a way that takes their life stages and resources into account. The age management skills of supervisors can be developed through training and orientation and by providing information about the special characteristics related to different ages and the ways of managing them in a work community. The aim is to train supervisors in age management and to enhance the relevant skills.

Example: "Age power at work" training programme

The programme was developed by an expert group at the Finnish Institute of Occupational Health together with other interested parties. The programme has a modular structure that allows for adjustment to the needs of an individual organisation. The aim of the training programme is to exploit the resources of employees of different ages in working life and to find working solutions to the age-related challenges of an organisation. It is important to fully exploit the competence of all employees for the success of the organisation and the well-being and smooth running of society as a whole. This way, you also promote the well-being and motivation of employees' to continue working. The training programme deals with age aspects in working life from the point of view of both the employer and the employee. The programme prepares the participants to help employees of different ages to continue with their careers.

Development of co-operative skills in the workplace

The development of co-operative skills in the workplace from the age point of view means promoting ways of working that decrease the stress and conflict factors related to different ages at workplaces, and correspondingly, increasing the exploitation of the resources and skills of employees of different ages. A positive attitude towards people of all ages means practices that support the work ability of both older and younger people and taking their needs into account. Age integration is successful when people of different ages work together in a motivated way and produce results and also share silent knowledge. The employees of a good work community give feedback, support each other's ideas and have a solution-oriented way of working.

Factors that enhance a workplace atmosphere include a fair-minded supervisor, equal treatment of employees, taking into consideration the life situation of the individual, a management that cares about the health and well-being of employees and an atmosphere that promotes the introduction of new ideas.

Individual factors include opportunities for the employee to influence operations and a feeling that he can use his previous experience and skills in his work. An employee may, for instance, enjoy the experience of making use of his competence in instructing, guiding and orienting colleagues.

Co-operative skills in the workplace can be developed to teach employees how to be a good team member. It is particularly important to practice conflict resolution and negotiating skills. Respectful interaction and listening to others are essential.

The essential co-operative skills in the workplace include interaction skills with colleagues, supervisors and subordinates, understanding one's own role and the joint goals of a team, taking others into consideration, an active approach towards work and its development, a positive and constructive attitude, acceptance of different views and the ability to accept and support the team leader.

Age-related differences can be a resource for the organisation

Age management is an important part of diversity management. In diversity management, the work community and employees are treated as an entity, paying special attention to the aspects that influence work ability. Those aspects include age, life stage, family situation, value base and the meaning of leisure time. Diversity management is necessary in order to allow employees to take advantage of the strengths that are derived from diversity and to work efficiently with other employees, even if they had different backgrounds, experience and cultural identities.

The differences and diversity related to age can be a resource for a work community. The well-being and efficiency of an individual is enhanced when he receives respect for who he is. A heterogeneous group of employees also supports the understanding of diverse matters as well as developing new views and ideas.

The basic principle of diversity should be included in an organisation's strategy and part of management culture. Tolerance usually increases when conditions allow. With organisation development challenges, it pays to remember that, although matters related to the atmosphere concern everyone, each employee is responsible for his own thoughts, attitudes and actions.

PLEASE NOTE

- ***A diverse work community is managed with appropriate respect and in a receptive spirit. Management takes care of the work ability of all employees.***
- ***The age structure of the organisation should be explored, its future should be predicted, and necessary measures should be defined.***
- ***The differences due to age and life situation as well as the competence and development needs of people of different ages must be considered.***
- ***Differing expectations of management depending on age should be identified***
- ***Workplace co-operative skills should be developed to make certain that important issues are discussed, feedback is given, the ideas of co-workers are respected and a solution-focused manner of working is encouraged and maintained.***
- ***Problems related to work ability must be identified early on and dealt with.***

4.2. Making plans for the career and for extending it

A career is expected to span decades of a person's life. Changes in working life have, however, changed the nature of careers. There are still a many people that are employed for years with virtually the same tasks by the same organisation. On the other hand, there is a growing number of people whose career consists of short periods with different employers. In addition to these groups, there is a group of specialists who can choose their job and employer and plan their careers as they like. The education, competence and professional skills of an employee are crucial in this respect. Under these circumstances, the basis for planning a career development may vary greatly, as do career expectations. Defining a lifelong career is possible less and less frequently.

Development discussion

A natural and day-to-day interaction between the supervisors and employees is part of a good work culture, but for various reasons, this is not always possible. Interaction can be increased using development discussions. At many workplaces, development discussions are an established practice where, on one hand, the goals of the organisation and their implementation are reviewed and, on the other hand, the goals and wishes of employees are discussed. The review also provides an opportunity to review development and competence needs and to discuss the employer's potential to support work ability, and also what the employee can do to maintain and develop his own competence and well-being. Development discussions are useful at every stage of a career. The matters reviewed may, of course, concern different things at the different stages of a career.

One should always prepare well for a development discussion. There are different discussion models that may be used as basis for the development discussion. When discussing work ability and well-being, the "work ability house" model developed by the Finnish Institute of Occupational Health (FIOH) can, for instance, be used as the basis in order to guide the discussion through the different "floors". Development discussions are individual, but they can be complemented with group discussions.

Each employee will experience a great variety of life situations during his career. Development discussions should also include matters that are related to an employee's situation outside working life, such as the need of flexible working hours for employees with young children or the needs of people who take care of their elderly parents.

Career planning

Based on the available information there are professions in which the career is likely to end in disability before old-age pension. This applies particularly to work with a great physical load. People in these occupational groups should plan ahead, early in the career, and work out how they will be able to keep fit until retirement. This can be accomplished by, for instance, planning the career to include a transfer to a less demanding job before their working capacity has been significantly diminished.

When retirement approaches, the remaining years at work should be planned. The development discussions should also take up the time of retirement, retirement itself and the employee's willingness to continue working after retirement. The agreement of the extension of work careers concluded by labour market confederations on 22 March 2012 states that a development discussion shall be conducted no later than when the employee

is 58 to 60 years of age. In this connection, the discussion should also include actions that could prolong the career, e.g. adjustment of work or the adaptation of the work load to the resources of the employee. The discussions may also include plans for transferring accumulated competence to younger employees.

PLEASE NOTE

- ***Development reviews are conducted at different stages of the career and they include competence and development needs, the career as well as occupational well-being.***
- ***Development reviews that focus on career planning early in a career are particularly important in professions with a high disability risk.***
- ***Development reviews should also take account of the employee's situation outside work.***
- ***Towards the end of a career, planning of the final years at work is initiated and retirement as well as the transfer of knowledge and competence should be planned.***

4.3. Managing competence and professional skills

Professional and skilled employees are a requirement of a successful organisation. The competence needs of an organisation are related to its strategic goals and development stage. Changes in the operating environment challenges the organisation to identify the competence it needs in order to succeed and which it must develop systematically. It is important to note the learning and development needs of employees and groups of employees at different ages and stages of their careers and with different professional skills and possibly different manners of learning and developing their competence. It is particularly important to pay attention to the ability of employees of different ages to perform at work and to use ICT and the opportunities it offers for gathering information.

In an age plan, the organisation can define operating policies and models related to the development of competence and professional skills in order to make full use of competence and professional skills of different generations, and their different ways to see working life and its challenges.

By adopting a positive attitude towards competence and the development of professional skills, an organisation not only supports productivity and effectiveness but also the work ability and continued careers of employees at different stages of their careers. This gives the employees an opportunity to engage themselves in the common goals and continuous learning.

Developing competence and professional skills

Developing competence and professional skills is a long-term commitment, both for an organisation and for an individual. Development is defined as a series of actions that are necessary for maintaining and developing the professional skills of an employee in order that such skills correspond to the requirements of the job and work assignments as well as the changing needs of competence that the organisation can foresee. From the point of view of the organisation, these are actions taken to reach strategic goals. From the point of

view of the employee, this means an opportunity to maintain employability throughout the career and an opportunity to develop his or her job and working environment. Regardless of the viewpoint, it is essential that the competence corresponds to the requirements of the job and that both the employer and employee recognise their responsibility for its development.

Developing competence and professional skills is a central part of management and supervisory work. The management and supervisors should actively oversee and encourage competence development and create structures, processes and support systems that are suitable for different competence needs and situations. This includes creating opportunities for professional interaction in the organisation. Employees should for their part take care of that their competence and professional skills correspond to the requirements of the job, that competence is turned into operational progress and improved results. Employees should also keep the workplace atmosphere positive and show that competence, learning and the sharing skills is appreciated.

Some of an organisation's competence can be fairly permanent and clearly structured. On the other hand, competence needs may sometimes change rapidly. Identifying the competence development needs in a timely manner may be a challenge. The best way to identify competence development needs is often through discussion between the supervisors and employees or between employees. Any difficulties in learning should be identified and the parties should agree on the ways in which competence is best developed in practice.

The organisation can draw up plans for the development of training on the basis of identified development needs. The Act on Co-operation contains provisions on the obligation of organisations to make training plans and on their contents. Collective agreements may also contain provisions on training plans.

Competence and professional skills can be developed in many different ways, at work or outside a workplace. Taking advantage of development opportunities as widely as possible is in the best interest of employees at every stage of their career. The development of competence and its different forms can be divided in the following manner, for instance: development through training, through instruction assignment or through the expansion of work assignments, among others.

Examples of different forms of developing competence and professional skill:

- 1) Complementary and further education, such as education not leading to an examination, education leading to an examination, apprenticeship training, competence-based qualifications, apprenticeship-type training for persons with higher education and independent studies.
- 2) Instruction assignments, such as counselling at work, working as trainer and with job orientation, student guidance and mentoring.
- 3) Development through the job expansion and changing of work assignments such as job and employee rotation, participation in projects and networks.
- 4) Other ways of developing competence such as feedback processes, job orientation, trainee programmes, coaching and counselling at work.

A possible age angle to the development of competence and professional skills is, e.g. organising the sharing of information and experiences between employees of different ages and at different stages of their careers. One should also remember the opportunities

offered by new community tools and social media for learning together and sharing information.

An organisation can support the employees' individual competence development and employability by, e.g. have a positive attitude towards apprenticeship when competence development can be linked to a degree programme or part of one. An organisation may also encourage individuals to maintain professional skills by using allowances offered by the Education Fund (adult education allowance and vocational examination grant).

Employee turnover and competence

The turnover of employees due to retirement, for instance, provides an opportunity for the organisation to update their competence capital. This can be managed successfully by preparing for personnel changes in advance and by identifying competence that the organisation cannot afford to lose. Preparations are especially important for organisations that need tacit knowledge based on experience that some employees possess.

When recruiting people, it is important that the applicants are assessed on the basis of their competence and professional skills and that the competence and skills of applicants of different ages are valued impartially. An organisation can ensure recruiting success by careful personnel planning, by using different recruiting channels and by developing connections with colleges and other seats of education and their students, for instance. Within the framework of this kind of co-operation, an organisation can, for instance, offer students of all ages opportunities for on-the-job training and practice, opportunities to complete competence-based qualifications and work for young or adult students under apprenticeship agreements.

PLEASE NOTE

- ***The development of competencies and professional skills is a central part of management and supervisory work.***
- ***Employees are responsible for their part in the maintenance and development of their own competence and professional skills.***
- ***Management, supervisors and employees together, create a positive atmosphere where competence, learning and competence sharing is valued.***
- ***The best way to identify competence development needs is often a discussion between the supervisor and employee or discussions between employees.***
- ***It is important to pay attention to the learning and development needs of employees and groups of employees at different ages and stages of their careers and with different professional skills as well as their ways of learning and developing competence.***
- ***The Act on Co-operation contains provisions on the obligation of organisations to make training plans and on their contents. The collective agreements may also contain provisions on training plans.***
- ***The development of competence may be carried out in several different ways at workplaces or otherwise through, e.g. training, instruction assignments, the expansion of job assignments and by other means.***
- ***When recruiting people, it is important that the applicants are assessed on the basis of their competence and professional skills and that the***

competence and skills of applicants of different ages are valued impartially.

4.4. Flexible working hours

The requirements of an organisation, the clients and the employees can be combined by applying flexible working hours. The use of flexible working hours may, for instance, improve customer service and satisfaction, allow seasonal work variation adjustments, improve reliability of delivery, improve the preparedness for sudden production disturbances, extend open hours and reduce lead times and delivery times. Flexible working hours that support the productive operations of an organisation can, at the same time, also promote occupational well-being, attract employees to extend their working life and offer working time that fits in with the employees' life situation. All members of a workplace should try together to find solutions that support the age-related needs and wishes of individual employees to adjust working time and to assess how these adjustments work from the point of view of the organisation and the work community.

The aim of flexible hours is to improve occupational well-being and promote staying on at work, so that the working life is extended, that preventable sick-leave and premature retirement is decreased. Another aim of these measures is to persuade more employees that continuing at work after the lower pension age is a meaningful alternative to retirement.

Gradual retirement and part-time work have in certain situations proven good models for both employers and employees. A number of studies show that people are prepared to work longer if the working hours and work load can be adjusted to the employee's life situation and resources.

Making use of flexible working hours

An employer has the right to decide on the planning of working hours. In addition to the needs of the operations and organisation, a balanced planning of working hours takes into account the needs of the personnel and of individual employees. The personnel programmes of the workplace may include provision for employees to use flexible working hours based on their life situation, if flexible hours are possible with regard to the nature of the work. An organisation's positive attitude towards various working time models and jointly decided application rules, make it easier to agree on working hours. The individual application of working time can be part of a regular development discussion.

Several family leave alternatives are available to employees with young children. In addition to the maternity and paternity leave, a parental leave period may be divided between the parents. Childcare leave is available either full time or part time. The Employment Contracts Act contains provisions on leave and the collective agreements on leave pay. The parental allowance, the child home care allowance and partial child care allowance are paid out by the Finnish Social Insurance Institution.

Flexible working time makes it much easier to combine work and leisure time, especially for parents with small children. It is already quite common that employees, who to a great extent manage their work independently, work flexible hours. Partial flexible working time models can usually be adapted to employees working in teams and taking care of customer contacts, subject to advance agreement. It pays to develop and test new solutions in the planning of shifts and their length.

Ageing employees may need more recovery time after work as well as more frequent breaks. This applies to both breaks in the working day and to days off. When dimensioning work quotas, planning process sequences and setting working hours, a particularly hectic or otherwise straining work spell should be followed by a sufficient rest and recovery period.

Arrangements at the individual workplace

Employers and employees may also agree locally on working time. One way of supporting employees of different ages is part-time work. Pay provisions are included in collective agreements. In addition to part-time work, there are also other ways of applying flexible hours, such as individually set hours, extended working hours, job alternation leave and part-time pension, providing individual employees with ways of combining working time with their life situation. A workplace should have common rules for the use of flexible working hours at an individual workplace and make sure that the arrangements with individual employees do not lead to a load that is too heavy for the rest of the work community.

In certain situations, remote work can increase flexibility, make it easier to combine work and family life and, at the same time, improve work efficiency. Remote work requires considerable self-discipline and cannot be applied to all types of work. When remote work is introduced, you must agree in detail on, among other things, work assignments, the targets of work, applying working hours, how the work results are monitored, the tools required and their use. The difficulty of separating working hours from leisure time may be a negative aspect of remote work, and it may lead to excessive commitment to work, too heavy a work load and also ergonomic problems. The advantages of remote work include greater freedom to adjust working hours, less commuting time and less office space required. Some collective agreements and other guidelines contain provisions on how remote work is carried out.

An organisation may work out an agreement on the general principles whereby employees of all ages use job alternation leave and older employees part-time pension, but every employee must also agree on specific arrangements, individually, with the employer. Even though employees who have tried such arrangements have usually found them useful and necessary, there is no evidence that they extend careers. An organisation may introduce arrangements that are primarily intended for ageing employees, starting at a specific age. Such a programme may include procedures designed to meet the needs of older employees, for example an age-oriented development discussion, special occupational health care support or extra leave. The leave that an organisation provides for ageing employees must in principle be available to all employees of a specific age. Extra leave, if included in the programme, must, however, be subject to special terms and conditions such as the duration of employment or other actions that require commitment by the employee, e.g. a health check or fitness test and complying with a health care programme. The annual extra leave under such programmes usually increases with the age of the employee. When designing a programme for an organisation, you should take into consideration the costs arising from the programme and how they are financed, the baseline for the industry and the relevant collective agreements.

A number of organisations have introduced leaves designed for older employees. They have proven useful, especially when not linked to the ordinary annual leaves but used to support recovery after periods of particularly heavy work load. An investment in extra leave, for instance, has paid for itself as careers have been significantly extended.

At certain workplaces and in certain branches of industry, it is possible to agree on an arrangement whereby working hours are accumulated in a “working hour bank”, later to be used as days off. Where this applies, it is important not to overload the employee with too many accumulated hours and that the days off are taken impartially and in a way that fits in with the work and suits the employee himself as well as other employees and clients.

Partial sickness allowance and partial disability pension

The partial sickness allowance makes it easier for an employee to return to work after a full-time sick leave. This practise is voluntary. The aim is to use a partial ability to work without risking the employee’s health and recovery. The partial disability allowance paid by the Finnish Social Insurance Institution compensates for the loss of income in part-time work. There may be changes in the terms and conditions of the partial sickness allowance in the near future. Current terms are available, for instance on the Finnish Social Insurance Institution website.

A partial disability pension may be granted to an employee whose work capacity has deteriorated by two fifths but who can continue to work part-time or with less demanding work. It is possible to gain a partial disability pension immediately after a career, and an employee can apply to a pension insurance company for a precedent decision on the right to partial disability pension. Having obtained a preliminary decision, the employee and employer have nine months in which to agree on the necessary work arrangements and to inform the pension insurance company of the partial disability pension.

PLEASE NOTE

- ***Flexible working time can be used to support the organisation’s ability to react to the changes of the operating environment, the function of the work community and the needs of the personnel and employer to increase flexibility in working hours. The solutions of an individual workplace, combining operational requirements with the needs of the personnel, are in a key position.***
- ***The working hour solutions in use are monitored and their impact on the organisation and personnel are assessed.***
- ***The dialogue is increased between employer and employees in order to assess the solutions that work best.***
- ***Working hour models are developed in order to support the productivity and results of the organisation as well as the well-being of the personnel.***
- ***A positive atmosphere is created at the workplace for using different, alternative working hours solutions by establishing clear rules and practices for them, e.g.***
 - ***Who shall discuss and agree on the matter?***
 - ***How do employees apply for a working hours solution and what are the preconditions?***
 - ***What is the impact on the work community and how is work divided: which tasks go to the employee on part-time retirement and how are other tasks divided?***
 - ***How are new employees and substitutes given work orientation?***

4.5. Modifying a work

Work ability is basically a question of the balance between the employee's resources and the requirements of his work. An employee's resources are determined by his physical and mental condition, his co-operative skills, education and knowledge as well as the ability to exploit this information – and obviously his values and attitudes. Work, on the other hand, involves certain requirements of physical, mental, social and intellectual competence. When the requirements of work exceed the resources of the employee, his work ability is threatened. When a conflict arises between the requirements of work and an employee's resources, the organisation must find the means of removing the conflict. The starting point could be to re-define the job and the work environment, to strengthen the resources of the employee or to change or adjust the work to fit the employee's resources.

The resource profiles of employees of different ages differ from each other. People age at a very individual pace. Ageing and the pace of ageing are influenced by both external factors and genotype. Personal habits and the work environment are among the external factors. One should, of course, keep in mind that ageing is part of life.

Changes in work ability

With age, the physical work ability diminishes and a given amount of work poses a greater physical burden. It takes longer to recover from physical strain when you are older. Although the physical capacity and performance usually deteriorate with age, a person's mental and social capacity may even improve. Young employees do not necessarily have the knowledge and experience that helps in managing a psychosocial load. Older employees are often able to grasp the big picture and to solve problems by using their experience.

Work ability must be monitored during the entire career. There are often signs of work ability limitations long before an employee ends up on sick leave. It is often the employee, his immediate supervisor or some other member of the work community that detects the first signs of work ability limitations. It can also be detected by the occupational health services. Where a practise of early intervention is in place, the matter is more readily taken up. It is important to try to adjust the work and working conditions at the earliest possible stage in order to prevent a disability. Occupational health services are responsible for the timely co-ordination of care and rehabilitation.

It is very important that both employer and employee are open and take appropriate action in monitoring how the employee copes with his job. Where elements of work ability are related to health, the occupational health services participate in the assessment, monitoring and support of work ability. A model for monitoring and managing work ability and early intervention which helps in maintaining work ability, is drawn up jointly by employer and employees and is regarded by the Social Insurance Institution as a precondition for paying out a higher level of compensation for preventive occupational health care.

Basis for modifying of work

Work tasks are modified on the basis of knowledge of the task requirements or the load factors that may become critical with regard to the work ability of an employee. When an organisation aims to prevent overload, disability and lost work ability, an appropriate risk assessment and an exposure test may be required. The occupational health services must also study the conditions of the workplace and the relevant load factors.

The work strain correlates directly with the disability pension risk. Long careers are based on the judicious management of physical and psychosocial workloads. As employees grow older and their health more fragile, the strain of work may become impossible to cope with. The load must then be lightened by adjusting or changing assignments. The workload may be reduced by making changes to the tasks, by introducing tools that make the work easier, by changing an individual's job to job for a pair, through job rotation or by using individual flexible working time models. The job modification may involve training and improving professional skills. The identification and prevention of the threat of violence, harassment and inappropriate behaviour at work also reduce work pressure.

Job modification may also mean easing the workload with either temporarily or permanently shorter working hours assisted by, e.g. a partial disability allowance or partial disability pension. On the other hand, other means of making work lighter should also be considered to allow the employee to continue working within the framework of his remaining capacity.

Many people feel shift work is a major load factor that strains their physical or psychosocial health. When shifts are planned, it is important to take into consideration the different resources people have and, above all, their individual ability to adjust to night shifts. Shifts must be planned with certain flexibility, and there must be sufficient recovery time between the shifts, particularly for older employees. It is often best to cut down on both night work and the number of consecutive night shifts. Among different work shift models, the human physiology seems to adjust best to a shift model that rotates rapidly forward.

In shift arrangements, as in other adjustments of work, an organisation must note any impact on the smoothness of operations and customer requirements, as well as any advantages gained by the organisation and operational productivity.

When changes take place in a work community, open communication is very important for a successful change. The occupational health service needs to support the organisation in any operational change. When changes, such as the job modification, apply to an individual employee, it is often possible to make the changes at fairly low cost. When the job is modified for an employee whose work ability has diminished, it may be possible to obtain financial support or advice from pension insurance companies, accident insurance companies, the Finnish Social Insurance Institution or the TE offices.

PLEASE NOTE

- ***Work assignments are modified as necessary at different stages of the career.***
- ***The ways to make a task less strenuous are investigated***
 - ***tools***
 - ***job rotation***
 - ***pair work***
 - ***flexible working time***
 - ***shift arrangements, etc.***
- ***Agree on how the change to a modified job takes place.***
- ***Consider how to develop the possibilities to influence in a job, its contents, the working pace and working time.***
- ***Make certain that the occupational health services co-ordinate timely health care and rehabilitation.***

4.6. Medical examinations at the workplace

The medical examinations plan of an organisation is based on periodic workplace health assessments, as defined in the Occupational Health Care Act. The workplace health assessments are conducted by a multi-professional team sent by the occupational health care provider to assess workplace conditions and possible health risks together with the employer and employee representatives. The health service representatives act as expert when the necessary workplace health assessments are planned.

The workplace health assessments must take into account the needs of employees of different ages, e.g. the musculoskeletal load of ageing employees and the risks that the workplace poses to reproductive health and, above all, pregnant employees. On the basis of an assessment, all employees receive guidance and advice on how to protect themselves against risks and how to improve the available work resources. In addition to an occupational health nurse and physician, the services of an occupational physiotherapist and occupational psychologist may be needed, and depending on the industry and on exposure, the services of an occupational hygienist or a health and safety expert. In addition to the risks and resources of work, a workplace health assessment should cover ergonomics, the prevention of musculoskeletal disorders, psychosocial load factors and mental well-being at work. General public health risks may also be covered, provided the employer agrees.

A medical examinations plan is designed jointly

The development of traditional medical examinations should be planned in co-operation with occupational health services and with personnel, on the basis of local requirements. With regard to work ability, employees benefit from both general preventive actions at the workplace and the opportunity to establish personal contacts with the health care provider and the preventive services, such as medical examinations. Well-designed questionnaires on health, work ability and occupational well-being are useful self-assessment tools and may inspire the employee to take care of his health and working capacity. They also help in directing support to those employees who need it the most.

In work that carries a particular risk of falling ill, health checks must be arranged as set out in the relevant decree and guidelines.

On the basis of the medical examinations, the employees and the occupational health services draw up an occupational health care plan that covers risks and resources related to the health and work ability of the individual as well as ways of promoting his health habits and work life. The key actors in executing the plan are the employee and his supervisor. The necessary working time arrangements and the support of the work community contribute to the maintaining and supporting the health and work ability of employees in different age groups.

An organisation may also consider various peer or support groups at the workplace, in addition individual appointments or to replace them. Working in groups is particularly suitable for preventive action and for guidance and advice in support of health and work ability.

Assessing the remaining work ability

The present emphasis of occupational health care is on the assessment of work ability and support in cases of prolonged sick leave. These actions must be initiated as early on as possible, as the assessment of remaining work ability and the likelihood of a return to work are required, at the latest, when the employee has received his sickness allowance for 90 days. This way, the remaining, even partial, work ability can be used, when necessary, by re-defining the job, adjusting the working conditions or working time with the employer. Health checks related to problems with work ability and absences due to illness are part of the statutory preventive health care work.

A rehabilitation referral, its co-ordination and the support for an employee who returns to work after a rehabilitation period, are important actions in extending careers.

PLEASE NOTE

- ***Health checks are based on risk assessments and workplace health assessments.***
- ***A medical examinations plan that supports work ability is drawn up. It focuses on the work ability and health risks of men and women of different ages and on the improvement of resources.***
- ***The occupational health services draw up a occupational health care plan with the client organisation on the basis of medical examinations.***

- ***Occupational health counselling at the workplace and supporting actions for work ability should be provided in the form of coaching.***
- ***Medical and professional rehabilitation must be provided***
 - ***early identification of the need for rehabilitation***
 - ***rehabilitation plan***
 - ***follow-up of rehabilitation programs and their results***

4.7. Promoting healthy habits and life management

The habits of an employee have an impact on his work ability. Each employee is basically responsible for his own habits. A healthy work community, good management and meaningful work can, as such, increase an employee's feeling of being able to manage his life and help him lead a healthy life. The organisation can also actively and systematically support and inspire employees to take care of their own well-being. The actions that an organisation takes in order to support the well-being of the individual may be particularly important for employees who otherwise would pay less attention to their health.

Promoting healthy habits with different actions and through encouragement can be incorporated in the age plan of the organisation. This ensures that they pay sufficient attention to any age-related factors and that the needs of employees of different ages are covered comprehensively. The employees and occupational health services draw up a plan, with the help of employee risk profiles, for instance, on how the organisation can encourage and support the personnel to make choices that promote health and healthier habits. Extended periods in a sitting position, insufficient exercise, overweight, stress, insufficient recovery time, insufficient sleep, smoking and drinking are all risks known to jeopardise health and well-being. These are also major factors in typical diseases in Finland, such as diabetes and cardiovascular and musculoskeletal disorders.

Healthy meals

Many endemic diseases can be alleviated with a healthy diet and weight control. It is therefore important that employees are given the opportunity to have a healthy, unhurried meal during the working day or shift, as set out in the Working Hours Act and industry-based regulations on working time. When possible, these arrangements should include all employees and their working time and job locations. A daily meal is also an important event from the social aspect and a break during the working day or shift that allows you to recover.

A healthy diet and weight control can be supported by, for instance, choosing healthy food for meeting breaks. If necessary, the organisation can arrange for nutritional advice and weight control groups for employees.

Physical activity programmes and support for physical activities

Employees should be encouraged to have healthy exercise. Particularly employees with sedentary jobs should be encouraged to have regular, healthy physical activity and to keep it up. In planning this type of arrangement, the organisation may consult with external experts, such as occupational health care and physical activity service providers. It is important that the activities arranged by the organisation are systematic and that their

impact is monitored using predefined metrics.

Possible physical activity programmes should be made part of the routine work by, for instance, seeing to it that employees reduce sitting down during the day and, for instance, work standing up from time to time or by taking breaks. The employees should also be encouraged to walk, run or bike to work. This can be done by arranging suitable preconditions for commuter workout at the workplace, e.g. shower facilities, and places where to keep the necessary equipment and bikes.

An organisation can also arrange different events that emphasise the importance of physical activity for the employees' physical functional capacity and mental well-being, brain function and quality of sleep. An employee can also be offered the opportunity to get acquainted with different forms of exercise.

Occupational health services can also guide those who exercise too little to existing exercise services and forms. If necessary, the organisation introduces "exercise prescriptions", which motivate employees to take up healthy exercise.

Employees can also be encouraged to take up health-enhancing physical activities outside the workplace, e.g. with financial support.

Example of health-enhancing physical activities:

According to recommendations of the UKK Institute, one should exercise briskly at least two and a half hours or alternatively heavily at least one hour and fifteen minutes per week. In addition, you should improve your muscular strength at least twice a week.

Smoking and substance abuse

Non-smoking and the prevention of substance abuse are especially important in the prevention of endemic diseases and in maintaining work ability. This is why organisations should encourage employees not to smoke or use alcohol or drugs and include related goals in all operations of the organisation. There are many ways in which an organisation can support people who wish to quit smoking. It can also forbid smoking altogether at the workplace. An organisation can, together with the occupational health service provider, establish groups for quitting smoking, providing the peer support for participants. In addition, the occupational health service provider can actively inform the employees of the health benefits of quitting smoking. The organisation can also reward employees who have managed to quit smoking on their own.

The goals of the organisation regarding substance abuse and the ways in which employees with problems are given treatment can be included in the substance abuse programme of the workplace. As part of the programme, the organisation can also define common practices for handling disturbing situations and timely intervention. An organisation should make sure that the occupational health service providers have sufficient expertise in handling substance abuse and that they aim to identify alcohol risk users as early as possible through "mini intervention". The labour market organisations' recommendation on substance abuse offers a framework for arranging the support needed by employees with abuse problems.

It is recommended that employees are informed of and trained to identify the problems

and adverse effects caused by substance abuse, to handle related matters in an open and constructive manner, to make the workplace's standard procedures (substance abuse policy) better known and to commit themselves to these as well as to promote direct and early intervention in cases of abuse and to refer employees with abuse problems to the relevant care provider.

Rest, recovery and stress management

Employees may need the support of the organisation in managing stress and in ensuring sufficient recovery. With the planning of working time and work shifts and with, e.g. work arrangements and the use of substitutes it is possible to give employees an opportunity to forget work after hours, during weekends or free shifts as well as during holidays. Employees can also enhance recovery through hobbies and other leisure activities. An employer may support hobby activities by financing different hobby clubs or issuing service vouchers for exercise and cultural activities.

Information technology has had an essential impact on work in many sectors, and the traditional boundaries of where and when work is done have disappeared. As part of work load management, an organisation can establish standard rules for electronic communication, e.g. when messages related to work may be sent and at what time employees are expected to read them, how soon they must be answered and how quickly the assignments have to be completed.

Sensible breaks at work and the use of different methods for quick relaxation, keep up a good feeling for working and improve the quality and productivity of work. People generally get a decreasing amount of sleep. This both weakens performance and exposes people to overweight and certain diseases, such as diabetes. Therefore it is important to emphasise that a sufficient amount of sleep is necessary for both well-being and for working capacity.

Early rehabilitation

It is possible to include in the age plan courses that enhance the employees' work and functional capacity, e.g. "Aslak" and fitness courses. Early rehabilitation provides an opportunity to intervene in advance with work ability risk factors or when the first signs of deteriorating work ability manifest themselves and the actions that the organisation or occupational health service providers take are insufficient to maintain work ability. Depending on the form of early rehabilitation, the arrangements require co-operation between the employee, employer, occupational health service providers, rehabilitation service providers and the Social Insurance Institution.

The aim of early rehabilitation is to support the work ability of an individual and the work community, to promote healthy habits and mental well-being as well as continuing at work. The manner in which the rehabilitation is carried out varies. It may be individual or arranged for a certain organisation or professional sector. There are also differences in the duration and contents of the courses. It is important that the rehabilitation takes place close to the employee's place of work, his work environment and home.

For employees, early rehabilitation, regardless of its form, provides the opportunity to become familiar with different forms of physical activity and daily exercise, to gain information on nutrition, the importance of rest and other areas of health and well-being.

They also gain information about their own physical and mental well-being. Thus, employees should be encouraged to not only take responsibility for their own well-being but also to support and encourage other employees to do so.

PLEASE NOTE

- ***Study factors related to an employees' work and habits that may pose a risk to his work ability, well-being and continuing careers.***
- ***Design ways for the organisation to encourage and support the personnel to make choices that promote health and healthier habits:***
 - ***Healthy nutrition***
 - ***Exercise programs and support for physical activity***
 - ***Managing/cutting down smoking and substance abuse***
 - ***Rest, recovery and stress management***
 - ***Early rehabilitation***

5. Practical application of an age plan using the job life cycle model

5.1. Information required for an age plan using the job life cycle model

Before an organisation or employer can confirm an age plan based on the job life cycle model, a great deal of information must be gathered. The information includes organisation data, data on conditions as well as the views of employees and supervisors on the need and basis for an age plan. The information is acquired as part of the routine gathering of data on operations and human resources.

The Occupational Safety and Health Act requires an employer to identify existing hazards at the workplace, to assess the risks and to take appropriate action to remove the risks. The Occupational Health Care Act requires an employer to make an assessment of working conditions and then organise occupational health care on the basis of the assessment. Each employee shall be informed of existing risks at work (principle of being informed) and of the ways the consequences of a risk can be prevented or reduced (principle of being prepared). Part of the information is gathered in the human resources database.

The organisation can use surveys at regular intervals to assess the effect of changes and development, although employees shouldn't be bothered with them by too frequently. There are a number of good IT applications for assessment, for instance surveys via cell phone or the Internet. The people responding should always be given feedback on the survey results and on any actions arising from it. Survey results can be used to add topical and concrete actions of development to an age plan, occupational safety programs or the annual plan for occupational health.

An age plan requires other background data, too. The Occupational Health Care Act requires the occupational health care service provider to make local assessment of workplaces in keeping with existing agreements with the client organisation. A local workplace health assessment includes an assessment of load factors for specific tasks and how they affect work ability as well as a subsequent action plan for controlling the load factors.

The reports on work environment surveys, human resource data and occupational health provide data for analyses that support age management and designing age plans.

Employee data (e.g. age and health data) processing in the workplace must conform to the requirements of protection of privacy legislation.

5.2. Implementation in a work community and for individuals

The contents and implementation of an age plan may vary and depends on local requirements and the size of the organisation.

When aiming to engage the workplace and the organisation as a whole (company, municipal administration, office, parish) in implementing an age plan, there are established structures for cooperation. In matters concerning the age plan, the occupational safety organisation and occupational health service provider are important partners of the employer and employee.

It is important to implement the age plan for the organisation as a whole in order to have standard routines, but, concerning the effect and results achieved, the deciding factor is the practical implementation in the work community. This is where an individual receives support in developing his skills, in taking care of his personal health, with his work and work arrangements, as set out in the age plan.

Supervisors have a central role in implementing good age management. They should be thoroughly informed in matters concerning the age plan.

An age plan doesn't necessarily require new plans or development projects for the organisation: the important thing is to recognise the actions that are necessary for the organisation and to implement them. The existing human resource tools work quite well in implementing the age plan:

- Occupational health and safety programme
- Occupational health care plan
- Gender equality programme
- Human resource plan
- Training programme

Nobody must be discriminated against when implementing an age programme, but it is clear that certain measures – age group health checks for instance – are carried out on the basis of age.

Development paths for individual organisations and target levels for implementing age plans

The requirements of the organisation must be taken into consideration when implementing the age plan. The Ministry of Employment and the Economy has published an industrial development strategy (2012), which includes development paths and target levels for individual organisations, providing a tool for organisations to identify their current status and to define their targets. The strategy paper takes up the following levels: good basic level, developer level and forerunner level. A move to the next, more demanding level follows the results of age management and of a specific training process. The contents of an age programme can also be developed and extended at the organisation's current level.

5.3. Tools and process

The table below takes up the main tools and measures required for an age plan that conforms to the job life cycle model.

Table 1: Main tools for implementing job life cycle model

Tools	Important for implementation
Basic tools: employer-employee cooperation	<ul style="list-style-type: none"> • Data on personnel age structure and other basic information for HR management • Personnel survey results • Existing plans for the organisation (occupational safety, health care, well-being at work, training etc.) • Workplace meetings • Development discussions • Project working groups • Use of internal and external experts (occupational health care service providers etc.) • Employer-employee cooperation (representative organs and direct cooperation)
Implementation of plan	<ul style="list-style-type: none"> • Joint discussion on age plan targets in practical terms • Decision on routines and tools for the workplace • The employer takes the final decision on organising the work and on development actions
Evaluation of results	<ul style="list-style-type: none"> • See chapter 6
Monitoring and development	<ul style="list-style-type: none"> • Draw lessons from age plan results and from the conclusions of supervisors and employees • Develop age plan and implement actions suggested by updated model

The design stage of the age plan should include a cost-benefit assessment. This undertaking will benefit from data input and the expertise of the occupational health service provider and the pension insurance fund (e.g. occupational health care reports and other reports).

Responsibility for age plan implementation

Preparing an age plan model falls within the scope of employer-employee cooperation, but the employer is responsible for working conditions and for personnel as well as related development, and thus, also for the implementation of an age plan. Employees nevertheless have a responsibility to participate in designing and preparing the age plan and also to do their part in implementing the plan.

Summary

The targets of an age plan are best reached, in areas such as development of health, skills and supervisory work, by utilising the existing models for cooperation and HR management tools. The occupational safety programme, the occupational health care action plan, the gender equality programme and the human resources plans are among the useful tools. An age plan can also be locally implemented in the planning of personnel training, occupational well-being and career paths.

When plans are checked and updated, the success of the age plan should be assessed. At the same time, an assessment should be made with regard to the results and success factors of the age plan.

PLEASE NOTE

- ***The age viewpoint must be sufficiently represented in every personnel survey.***
- ***Participants must be informed of survey results.***
- ***The age plan is implemented by, first, gathering information on ageing along with other basic data, then designing the appropriate measures and, finally, assessing the results.***
- ***The information on age plan results must be given in sufficient detail.***
- ***Planners should determine how to utilise existing employer-employee cooperative routines in implementing an age plan locally.***
- ***Planners should determine which existing personnel policy tools are useful in the implementation of an age plan.***
- ***Planners should determine what additional tools or practises may be needed to implement an age plan.***

6. Evaluating the results and effect of an age plan

The important thing is to evaluate the results and effect of an age plan at the organisation. This is true for small, medium and large organisations. There are useful tools available for assessing the results and effect of an age plan.

The evaluation of an age plan should be made jointly by the employer and employees. They can also use other actors, such as the members of the occupational safety committee (works committee), management and supervisors of the personnel representatives and the occupational health service provider.

The evaluation may be based on both the independent assessment of the other actors and on an assessment based on group discussions (dialogue and search for a common view). The evaluation of the performance of an age plan based on the job life cycle model can be based on both qualitative criteria (seeking viewpoints and opinions) and quantitative criteria (the assessment objects are assigned grades, for instance, from 1 to 10).

The following item presents two ways of evaluating the performance of an age plan.

SWOT analysis

A SWOT analysis is a structured planning method used to evaluate the *strengths*, *weaknesses*, *opportunities*, and *threats* involved in a project or operation. The SWOT analysis is presented using a 2x2 matrix.

The table below gives an example of how a SWOT analysis could be used to evaluate the results of a local age plan:

<p>Strengths <u>Examples:</u> - smooth management-personnel cooperation - age plan implemented by competent people</p>	<p>Weaknesses <u>Examples:</u> - negative age perceptions - slow decision-making - poor adaptability</p>
<p>Opportunities <u>Examples:</u> - good health care resources and enough resources for implementation</p>	<p>Threats <u>Examples:</u> - lack of employees and increasing work strain - increasing financing problems</p>

Figure 2. Example of applying SWOT analysis to assessing the results of an age plan

SWOT analysis for an age plan in practise

The SWOT analysis for an age plan is designed to determine

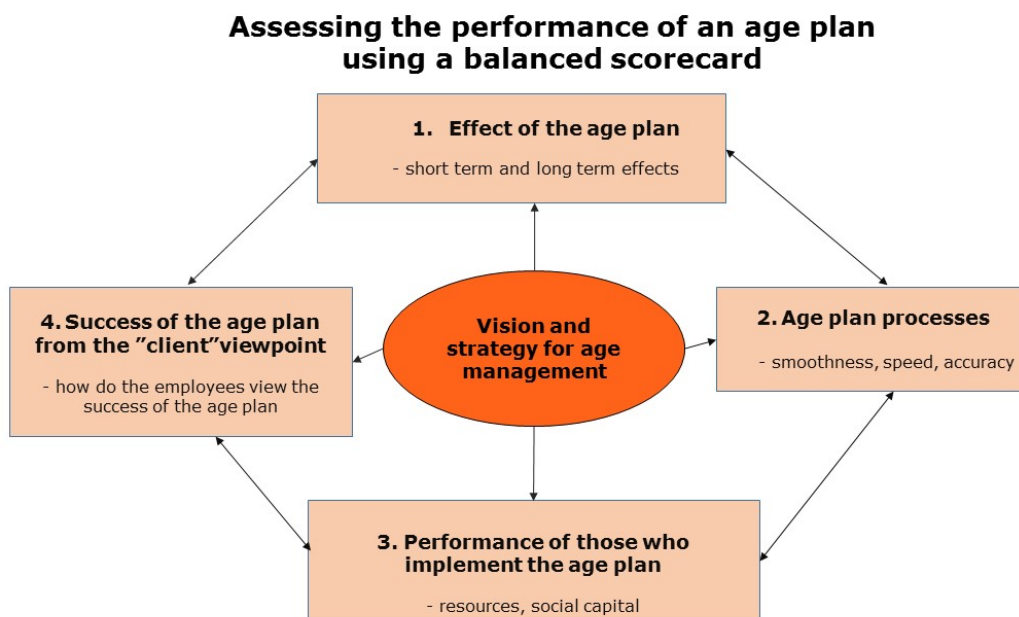
- a. how the age plan strengths can be maintained and improved.
- b. how weaknesses can be overcome and what actions will reduce them.
- c. how opportunities can be exploited.
- d. how threats can be neutralised and solutions found for them.

The important thing is to determine how to move on from an analysis to concrete development actions in age management on the basis of the analysis. It provides a good information base and also elements for the development of the age plan.

Balanced scorecard (BSC)

An alternative approach in assessing the performance and results of an age plan is to use a balanced scorecard (BSC). This approach is particularly suitable for organisations that already use balanced scorecards in planning and assessing their production and HR management: it comes naturally to apply the methods to assessing the performance and results of an age plan as well.

The figure below is an illustration of this



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Fig. 3. Evaluating the performance of an age plan using a balanced scorecard

The diagram of four boxes (effect, workability, performance and client perspective) is a visual aid in the reflecting of age management results and performance in those four areas.

Each perspective, described in the relevant box, includes examples of possible viewpoints, metrics and indicators. Some metrics (e.g. personnel survey results) can be assigned a grade value, whereas others (e.g. local management practises) require that a (grade) value is first defined verbally and only then, possibly, assigned a grade value. It must be emphasised that the metrics shown here are only examples and that the scorecard metrics are always chosen individually by each organisation.

PLEASE NOTE

- ***Determine age plan targets and evaluate results of the plan.***
- ***Use evaluation as a basis for discussing the need for updating the age plan.***
- ***In this way, age management becomes a systematic process where the experiences of both management and employees regarding age management are used as a basis for updating the age plan.***

7. Examples of age plans in different organisations

This chapter contains a few examples of age plans currently in use in various organisations. The organisations are large and the age plans are designed on the basis of their own requirements. They cannot be applied as such in just any organisation, but they do illustrate the types of age plan currently in use. The senior positions of the age scale predominate in the plans, because the organisations have viewed them as the natural point of departure. As the work on an age plan proceeds, the plan should be extended to include all age groups in the organisation.

Kela, Social Insurance Institution of Finland

In October 2007, a collective agreement included an agreement on initiating the designing of an age plan. An age plan entitled “Kela – working at every age” was designed as part of an internal well-being at work project and implemented in 2010. That year, the common theme at the Kela development discussions was Age and the Kela age plan. The reviews were supported by a web-based learning course called “I am a welfare contributor” as an age-related element under the heading “Kela – working at every age” that included

- 1) the different dimensions of age
- 2) generations meet at work
- 3) age talk is necessary.

The purpose of the Kela age plan was to increase the positive impressions of the entire work community in age-related matters. The aim of the age plan is to achieve management practises at Kela that are respectful of human diversity. Tasks are allocated with attention paid to the special characteristics and life situations of people of different ages. Individuals receive support in different ways to help them develop and to work in co-operation, the aim being that as many people as possible can, and choose to, work for a long time at Kela.

The target of the Kela age plan is to gain information on ageing and increase the understanding of how age affects work. The plan also aims to reinforce positive attitudes towards people of every age, to improve the ability of supervisors to adjust specific tasks to the age, resources and life situation of an individual. An additional aim is to support people in maintaining work ability in different ways and to support people of all ages in maintaining and developing skills at different points of their careers.

The age plan includes

- Increasing age-related awareness through positive communication
- Developing the skills of supervisors in age-related matters
- Introducing timely planning for extending a career (development discussions include discussions on career development for employees of every age and from age 58, the idea of extending the career is included with each person)
- Working time flexibility where possible (age plan appendix presents the flex time parameters at Kela)
- Occupational health care support at different ages
- Resource course pilot project (group training with the aim of reinforcing employee resources has been tried as a part of the age plan)
- Mentoring in support of competence development
- Local IT support (the age plan includes a survey on organising IT support)

Nordkalk

The age plan covers every employee at Nordkalk. Different actions are aimed at different age groups, allowing for the fact that life situations and needs vary at different stages of life.

The plan comprises of three age groups

- 35 minus (established 2008)
- Middle Ages (established 2009)
- 55 plus (established 2002)

When designing the age plan in 2002, the 55 plus age group was interviewed about their needs/wishes, with a follow-up interview in 2010. Supervisor training includes aspects of age management. Procedures have been introduced for transferring tacit knowledge, which may relate to works safety, working methods or resolving problem situations.

The aim of the 35 minus program is to help younger employees to network and to create peer groups, improve well-being at work and to strengthen the engagement to Nordkalk in the younger employees. Group meetings provide members with current information and activities (e.g. work-life balance, personal development and networking). Mentoring pairs are formed. For people in the international/expert/supervisor posts, there are special orientation and training programs in addition to the standard orientation programs. Employees have the option of completing a vocational degree.

The Middle Ages group (aged 36-45) meetings consist of current theme discussions with the occupational health care service providers. The group arranges an annual recreation day and supports activities outside work (exercise/culture vouchers), aiming to support coping and well-being at work. This group is also included in the mentoring and vocational degree programs.

People in the 55 plus group are entitled to an additional, optional health check. There is an annual development discussion for all personnel, but of the 55 plus group have an in-depth review to discuss career plans up to retirement. The 55 plus group have an annual recreation day and also meetings of a few hours with speakers on themes such as health and retirement. The 55 plus group provides mentors.

Nordkalk applies zero drug tolerance. Alcohol is never served at work, not even at retirement parties or similar parties. The company does not present gifts of alcohol. Heavy vehicles are fitted with alcolocks. Breathalyse tests are taken randomly, one unit at a time (e.g. factory/office/division).

Municipality of Helsinki

The age plan is based on the City of Helsinki Strategy Programme for 2009 - 2012, with the target of being the model city of age management.

Replacement model

The replacement model means that a successor is hired before an employee leaves his job. The arrangement allows the employee to give the successor work orientation. The functionality and experiences were evaluated and the conclusion was that the transfer of skills was faster and more substantial than usual. The replacement model has also had a positive effect on work engagement.

Age plan of Stara (formerly HKR-Tekniikka)

Stara (formerly HKR-Tekniikka) is an internal, net budget unit of the Helsinki Public Works Department. The average age of unit personnel is high. In the years 2004 to 2008, when the unit was known as HKR-Tekniikka, the implemented age plan improved awareness of matters related to occupational health and age. Stara introduced a health guarantee, which was created by increasing the frequency of health checks as the employees grew older.

The age plan includes the following measures

- Monitoring of the load factors of a job
- Personal career development plan with an age bias
- Development discussions from the age perspective
- Health guarantee (health checks at least once a year for employees over 56)
- Employees, supervisors and the occupational health care provider communicate and cooperate through a internal system called eHR

An internal e-mail system, eHR, was developed to support supervisors and the occupational health care provider. The system includes basic employee data, skills and training, work history, development discussion notes and absence records. The job strain factors are also monitored for employees age 56 and over. The demands of a specific job are evaluated by the employee himself, the supervisor and the occupational health care provider. They each make the evaluation on the basis of their own experience, fitness tests and other indicators. The observations of the occupational health care provider form the basis for workload-related decisions on time off for older employees. The data in the computer system is available to the individual employee, his supervisor and the occupational health care provider. Management is provided with summaries that illuminate the development needs of individual employees and of human resources as a whole.

On completion of the age plan period in 2011, Stara has launched follow-up projects, including Stydi, a three-year program in support of strategic well-being at work. The Stydi program includes training programs for supervisors, e.g. "The Supervisor as a skilled Stara developer" and the web course "The Good supervisor's primer". The Stydi program includes a well-being at work survey, on-site Safety walk rounds for management and works safety training arranged by the City of Helsinki Oiva Akatemia institute.

Abloy

Abloy employees have the option of entering the Ikämestari (“Age master”) program when they turn 55. The aim of the program is to meet the challenges posed by age structure, coping with work and transfer of skills. The aim is to promote the work ability and well-being at work of employees, to reduce sick leave, to increase the average retirement age, to enhance the appreciation of older employees and to secure the transfer of skills.

The Ikämestari programme includes extra days off for employees aged 58 and over, increasing from an initial six extra days to twenty extra days. The extra time off under the Ikämestari program is subject to participants taking an annual fitness test. The fitness tests have different alternative forms and no target levels apply. Fitness test results are given only to the participant. Employees can have a maximum of three days off at a time, the dates agreed with the supervisor. The aim is specifically to support recovery from demanding work.

The basic structure of the age programme is similar at all plants, but the implementation may show local variations, depending on available service providers etc. For the “Age masters” it is a point of honour to be active and result-oriented in transferring their own knowledge to younger colleagues.

Since the Ikämestari program was introduced, the average retirement age at Abloy has increased from 59,5 to 63.

Oras

The aim of the Oras age plan is to maintain the work ability and well-being of employees aged 55 or more and to ensure that their careers continue until the full age of retirement.

The plan includes health checks, fitness tests and individual fitness programs including, if necessary, a follow-up sequence. The well-being program includes 1 to 3 supervised well-being days with different themes. Older employees receive a number of days off, provided they participate in health and fitness tests, training programs and well-being programs.

The company has established a systematic routine to transfer skills from older to younger employees. In addition to individual tasks, the company has introduced special tasks for older employees, such as mentoring new employees and those beginning their careers, training on the apprentice-master model, transfer of skills and training at the company’s faucet school.

When an employee reaches the age of 55, his development discussion includes an “interview for seniors”. The discussion goes into greater detail on career development at the approach of retirement, potential obstacles or challenges are evaluated and solutions sought and the employee is asked about his willingness to take on tasks designed for older employees.

Time off for older employees

The system for time off for older employees is designed to support work ability and coping with work. The system allows for optional days off after a strenuous work period, before the employee is overworked to the point of illness. The time off is limited to five days at a time

and the extra days off cannot be added to annual leave. Employees must choose the days off with their supervisor's approval. Employees of 55 or older, who work a full time and who participate in all work ability programs of their age group, are eligible for extra time off. If an older employee is absent on sick leave more than usual during the year, he prepares his own proposal, addressed to his supervisor, on how the sick leave days affect his right to time off.

Saarioinen

The regulations on collective agreements in the food industry require the employer to review, together with an employee aged 50 or more, actions in support of coping at work and extending the career of the employee. The review should aim at a solution that is appropriate for both parties and which, as far as possible, will ensure the income level of the employee. The review can be made part of the development discussion.

Applying for Older employee status

The status as Older employee is optional. When an employee turns 55, he can apply for Older employee status by so informing his supervisor. The supervisor then conducts a development discussion with the employee, where any work ability limitations are discussed as well as rehabilitation and training requirements and other matters related to current or future tasks. A memorandum of the review is written and subsequently used as a basis for planning the future career. Older employees receive training and orientation for new tasks at their own pace.

Privileges for older employees

The pay level (base level) of older employees is not reduced even if the new tasks are less demanding than the current tasks. Additional pay and performance bonuses are determined according to the new task. The company aims to arrange for work other than three-shift work for older employees who, for reasons of health or other reasons, should avoid shift work. If an employee so wishes, the company will try to avoid moving him from one job to another. He will be considered "first in line" for his own job.

An older employee can choose to substitute time off for both his service bonus and his annual leave pay. The dates of time off is determined by the company, and the employee cannot take time off in the holiday season. Older employees who have a legal right to Job alternation leave, also have a privileged status with regard to time off, when there are more leave applications than the available company quota allows.

The age plan is seen as a positive company image factor at Saarioinen. There are also concrete results: since the age plan was implemented, the age of retirement has increased by just over two years, reaching an average of 61,5 years in 2010.

Berner

Berner Oy is a family enterprise established in 1883. Berner introduced a program for older employees as part of the age management program, and as result the average retirement had increased to 64,5 years in 2012.

The program was designed jointly by management, supervisors and employees and is open to anyone of 55 or older. Employees draw up a career plan with their supervisor, including an evaluation of the need to review assignments, working time and working conditions.

When an employee turns 58, he can participate in a program for older employees that includes health checks, work ability programs and extra time off. Employees between 58 and 60 are allowed five working days off and the 60+ group eight working days off annually. Extra time off is subject to participation in a physical capacity program arranged by the company and the occupational health service provider.

The company supports age management, that is, management in support of cooperation and communication between employees of different ages. Management of older employees is one of the tools of age management and it is intended to improve the supervisor's attitudes to ageing, ensure the transfer of skills and show respect for the experience, skills and commitment of ageing employees.

Employees about to retire can sign up at a personnel bank, through which they can be called in as substitutes or to take on seasonal jobs.

The development discussion of younger and "middle-aged" employees includes a personal development and career plan.

Age management is defined as good management, according to the Berner values.

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Appendix 1. Item recorded 13.10.2011 in the age plan pursuant to framework agreement

Age plans

- A common model to be designed for age plans applied in businesses, municipal administration and government offices
 - model design work and introduction
 - elements include flexible working hours for older employees, health check programs and training activities aimed at older employees

Appendix 2. Item recorded 22.3.2012 in the age plan pursuant to the agreement of the extension of work careers

Age plans and individual career plans

- Pursuant to the framework agreement, the parties of a collective agreement design a joint model for organisation age plans
- Local workplaces ensure that age plans apply every employee, using individual career plans, for instance
 - The industrial representatives have undertaken to design a joint age plan model. Elements include flexible working hours, health check programs and training measures aimed at older employees, among other items. The age plan covers every age group
 - In addition to the age plan, each older employee (58 and older) participates in a personal development discussion which aims at an agreement on actions to support an extension of the career. This leads to designing a model for personal progress (e.g. career plan). The plan provides for development needs (workplace arrangements, working hours etc.), continuing at work and transfer of skills, if applicable.
- The parties of a collective agreement determine how to support the implementation of age plans and personal career plans