***The European social dialogue and the development of the solidarity between generations of workers:***

***focus on “over 55” and young workers in the finance sector. Sustainable Growth and generation gap (VS/2018/0040)***

**Generations in the financial sector (questionnaire template)**

The purpose of the questionnaire is to collect information on inspiring practices in intergenerational cooperation in the financial sector. The information obtained will be used to prepare studies and reports for stakeholders.

The questionnaire is addressed to managers/specialists dealing with human resources management, corporate social responsibility or/and representatives of trade unions. Below is the questionnaire, while the instruction for preparing of the good practice card is on the page 5. Fields with the \* mark are necessary to complete.

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| **The name of the good practice** |
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| **Information about the institution implemented good practice** |
| The financial sector institution name (for example bank, banking group, insurance companies, pension funds), that provides the good practice\* |  |
| Country/address\* |  |
| The range of financial institution activity (international level, country level or regional)\* |  |
| The main channel for banking/insurance products sale\* |  |
| Whether in the institution are functioning trade unions? If yes, please specify (name, www, contact links)\* |  |
| Whether the institution participate in any employer’s or sector organisation? If yes, please specify (name, www, contact links)\* |  |
| What is the estimated age structure of employees in the institution?  | □ employees aged below 30 ………….. %□ employees aged between 30 and 50 ………….. %□ employees aged 50 or more .…………. % |
| Are there now any problems related to age diversity in the institution? Please specify |  |
| Does the institution take into account the issues related to the aging of the population in its strategy (eg dedicates different products and solutions to older clients, offer electronic and branch services, offer a choice of communication channels due to age)? Describe, please\* |  |
| Are issues related to age management, including intergenerational transfer of knowledge, included in: (select all appropriate)\* | □ development/business strategy□ human management strategy□ strategy and/or document on the social responsibility □ implementation document/concept of ethical conduct of employees□ other (please, specify)□ none of …. |
| Do social partners (trade unions, employers' associations, etc.) engage in activities related to age management, including intergenerational transfer of knowledge? What is this cooperation about?\* |  |

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| **Good practice matrix** |
| The origin of the good practice:\*(select all appropriate and specify them) | □ internal strategy of the institutionIf yes, please specify…………………….□ external legal framework (eg. A Code of Conduct for Banking) If yes, please specify…………………….□ initiative of employees (eg. agreement with trade unions)□ other If yes, please specify……………………. |
| Group/target groups activities\* |  |
| The number of employees covered by support |  |
| Source of financing activities within the framework of good practice (own, external eg UE funds) |  |
| The term of the realization |  |
| Web page (s) with information on good practice |  |
| The type of good practice (level of implementation)\* | □ only this bank/insurance company/pension fund□ bank/insurance/pension fund group in ……………………….…………... (country)□ bank/insurance/pension fund groups, in many countries (which countries? …………………………………………………………………………………………………………) |
| The type of good practice (select all appropriate)\* | □ good practices or tools for business agreements aimed at enhancing human resources "over 55" |
| □ measures to encourage and enable "over 55" workers to stay longer or return to the labour market  |
|  | □ good practices on agreements on the definition of skills, knowledge and professional skills certified at the transnational group level to promote Age Management processes as well as intragroup mobility |
|  | □ good practices of business agreements aimed at enhancing generational differences and promoting dialogue and solidarity among generations of workers |
|  | □ good practices in the definition of redeployment paths for older workers and highly professional profiles through alternative-collective agreements on collective redundancies focusing on transnational mobility within the group |
|  | □ good practices on transnational “joint texts” and collective bargaining in the business or sector “joint texts” that involve recapturing redundant workers as a result of reorganization processes, in case the need for new recruitment is felt |
|  | □ measures related with inequalities in economic protection and treatment compared to the segmentation of workers by age groups |

 **Objective of the activities carried out within the framework of this good practice**

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**Activities provided within the framework of this good practice**

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**Indicate realised measures\***

* balance of skills (technical, motivational, behavioural),
* mentoring activities,
* coaching activities,
* training course to improve, for example, computer skills,
* digital literacy activities,
* flexible working hours,
* gradual retirement transitions,
* work-life balance measures,
* health and safety prevention measures at workplace,
* organizational adaptations designed to increase work ability over time,
* tutoring practices through which new job hiring is for example assigned to a referring person who takes the role of Mentor / Tutor to facilitate the process of integration into the organisation and work;
* reverse mentoring activities whereby young people with less experience, but with strong digital expertise, help senior workers with a long working experience to familiarize themselves with technology in search of mutual exchange,
* “Generational Relay” through which gradual exit from the work of the elderly (e.g. by part-time transition) and the related entrance of young people is expected,
* job sharing among employees who plan to retire and persons who are supposed to replace them,
* the familiar Job-Sharing with the parent / child exchange,
* work rotation,
* gradual retirement,
* team approach to the-long term project management,
* divide responsibilities so that employees can replace one another, this is also called the doubling of the competence,
* draw up a documentation of performed tasks thanks to which other employees can replace the retired one (building a bank of knowledge),
* prepare successors for pivotal positions,
* in bridge projects,
* solidarity agreements,
* keep in touch with retired employees who possess expertise,
* hire retired employees when there is a need for it
* redeployment paths for older workers and highly professional profiles through alternative-collective agreements on collective redundancies focusing on transnational mobility within the group,
* transnational “joint texts” and collective bargaining in the business or sector “joint texts” that involve recapturing redundant workers as a result of reorganization processes, in case the need for new recruitment is felt,
* skills, knowledge and professional skills certified at the transnational group level to promote Age Management processes as well as intragroup mobility,
* measures related with inequalities in economic protection and treatment compared to the segmentation of workers by age groups.

**Results**

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**The strength of good practice**

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**Involvement of the social partners in the implementation of good practice\***

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**Recommendations / other suggestions\***

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| **Persons responsible for description of good practice** |
| **Financial institution representative (if applicable)** |
| First name and last name\* |  |
| Are you belong to indicated groups in the institution implementing the good practice:(select all appropriate)\* | □ HR staff□ trade union□ employers’ associations□ other (please, specify) ……………………………………………………………………… |
| Position in the organisation\* |  |
| **Project *The European social dialogue and the development of the solidarity between generations of workers: focus on “over 55” and young workers in the finance sector. Sustainable Growth and generation* partner representative (if applicable)** |
| First name and last name\* |  |
| Country\* |  |
| The name of the partner institution\* |  |
| The date of preparation of the card\* |  |

**Generations in the financial sector (questionnaire #1)**

Questionaire should describe activities in the area Age Management and Intergenerational Solidarity in financial sector in partner’s countries. Length of each good practice: 5 pages

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| **The name of the good practice** |
| Enter the name of the good practices that best describes it. If it was carried out under the program/project, enter the name of the program/project eg. INTERMENTORING AS THE BEST SUPPORT |

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| **Information about the institution implemented good practice** |
| The financial sector institution name (for example bank, banking group, insurance companies, pension founds), that provides the good practice\* | Bank XYZ |
| Country/address\* | Poland, Warsaw |
| The range of financial institution activity (international level, country level or regional) \* | Specify the countries or regions (province), in which the financial institution carries out its activities eg. Branch of international group |
| The main channel for banking/insurance products sale | For example: Internet or stationary branches or agents/brokers |
| Whether in the institution are functioning trade unions? If yes, please specify (name, www, contact links) \* | YESSolidarność ([www.solidarnosc.org](http://www.solidarnosc.org)) Piotr Kowalski (Piotr.kowalski@solir.pl) |
| Whether the institution participate in any employer’s or sector organisation? If yes, please specify (name, www, contact links) \* | NO |
| What is the estimated age structure of employees in the institution? \* | Please indicate the approximately percentages for all age group using date from the end of last year.□ employees aged below 30 ….35…….. %□ employees aged between 30 and 50 …55…….. %□ employees aged 50 or more . 10………. % |
| Are there now any problems related to age diversity in the institution? Please specify | The range of employees planning the retirement is significant. The age gap is possible. We need holistic program aimed better transfer of experiences and competencies from the eldest to others employees. |
| Does the institution take into account the issues related to the aging of the population in its strategy (eg dedicates different products and solutions to older clients, offer electronic and branch services, offer a choice of communication channels due to age)? Describe, please\* | YES, bank offer special portal for old client…. |
| Are issues related to age management, including intergenerational transfer of knowledge, included in: (select all appropriate) \* | □ development/business strategy**□ human management strategy**□ strategy and/or document on the social responsibility □ implementation document/concept of ethical conduct of employees |
| Do social partners (trade unions, employers' associations, etc.) engage in activities related to age management, including intergenerational transfer of knowledge? What is this cooperation about? \* | YES, the trade union carried out research among employees about……………….. |

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| **Good practice matrix** |
| The origin of the good practice\* | □ internal strategy of the institutionIf yes, please specify…………………….□ **external legal framework (eg. A Code of Conduct for Banking)** If yes, please specify **A Code of Conduct for Banking**.□ initiative of employees (eg. agreement with trade unions)□ other If yes, please specify……………………. |
| Group/target groups activities\* | Describe your target groups, indicating the age limit for workers covered by the support (if applicable) eg. Managers in multi-age teams |
| The number of employees covered by support | Eg. 100 persons in three years |
| Source of financing activities within the framework of good practice (own, external eg UE funds) | Point to, or only own funds of the institution, whether public support (what?) eg. Financed by EU project “Managers….” |
| The term of the realization | Specify the period during which the good practice has been implemented using eg. format: 01.02.2006 – 30.04.2007 |
| Web page (s) with information on good practice | [www.solidarnosc/raports/agemanagemnet](http://www.solidarnosc/raports/agemanagemnet) |
| The type of good practice (level of implementation) \* | □ **only this bank/insurance company/pension fund**□ bank/ bank/insurance/pension fund group in ……………………….…………... (country)□ bank/ bank/insurance/pension fund groups, in many countries (which countries? …………………………………………………………………………………………………………) |
| The type of good practice (select all appropriate) \* | □ good practices or tools for business agreements aimed at enhancing human resources "over 55" |
| **□ measures to encourage and enable "over 55" workers to stay longer or return to the labour market**  |
|  | □ good practices on agreements on the definition of skills, knowledge and professional skills certified at the transnational group level to promote Age Management processes as well as intragroup mobility |
|  | □ good practices of business agreements aimed at enhancing generational differences and promoting dialogue and solidarity among generations of workers |
|  | **□ good practices in the definition of redeployment paths for older workers and highly professional profiles through alternative-collective agreements on collective redundancies focusing on transnational mobility within the group** |
|  | □ good practices on transnational “joint texts” and collective bargaining in the business or sector “joint texts” that involve recapturing redundant workers as a result of reorganization processes, in case the need for new recruitment is felt |
|  | □ measures related with inequalities in economic protection and treatment compared to the segmentation of workers by age groups |

 **Objective of the activities carried out within the framework of this good practice**

Review objective the implementation of good practice. Provide information about the background of the good practice, eg:

* the challenges it addresses(ed) on the organisation level,
* the context, in which it is/was carried out; highlight the national economic & social environment, the specific features of the national policies and legal framework and relevant policies that influence(d) the good practice (e.g. precondition its success or impede its implementation).

**Activities provided within the framework of this good practice**

Eg. description of the implementation stages

**Indicate realised measures**\*

Description of the activities, beneficiaries, etc.

* **balance of skills (technical, motivational, behavioural),**
* mentoring activities,
* coaching activities,
* **training course to improve, for example, computer skills,**
* **digital literacy activities,**
* **flexible working hours,**
* gradual retirement transitions,
* work-life balance measures,
* health and safety prevention measures at workplace,
* organizational adaptations designed to increase work ability over time,
* tutoring practices through which new job hiring is for example assigned to a referring person who takes the role of Mentor / Tutor to facilitate the process of integration into the organisation and work;
* **reverse mentoring activities whereby young people with less experience, but with strong digital expertise, help senior workers with a long working experience to familiarize themselves with technology in search of mutual exchange,**
* “Generational Relay” through which gradual exit from the work of the elderly (e.g. by part-time transition) and the related entrance of young people is expected,
* job sharing among employees who plan to retire and persons who are supposed to replace them,
* the familiar Job-Sharing with the parent / child exchange,
* work rotation,
* gradual retirement,
* team approach to the-long term project management,
* **divide responsibilities so that employees can replace one another, this is also called the doubling of the competence,**
* **draw up a documentation of performed tasks thanks to which other employees can replace the retired one (building a bank of knowledge),**
* prepare successors for pivotal positions,
* in bridge projects,
* solidarity agreements,
* keep in touch with retired employees who possess expertise,
* hire retired employees when there is a need for it
* redeployment paths for older workers and highly professional profiles through alternative-collective agreements on collective redundancies focusing on transnational mobility within the group,
* transnational “joint texts” and collective bargaining in the business or sector “joint texts” that involve recapturing redundant workers as a result of reorganization processes, in case the need for new recruitment is felt,
* **skills, knowledge and professional skills certified at the transnational group level to promote Age Management processes as well as intragroup mobility,**
* measures related with inequalities in economic protection and treatment compared to the segmentation of workers by age groups.

**Results**

Explain all results the good practice helped to achieve. What was the impact on the key internal and external stakeholders? Mention both positive, and negative (if any) results/ impact.

**The strength of good practice**

What were the most important factors of success of the project/programme? What in your opinion makes State action in relation to other age-management and solidarity between generations?

**Involvement of the social partners in the implementation of good practice**\*

Whether the trade unions engaged in designing and implementing good practice. In what way?

Whether employer’s union or other organisation (specially functioning in the banking sector and dedicated to banks) are involved on any stage of implementation of good practice? In what way?

**Recommendations / other suggestions**\*

Opinion about possibility of usage this good practices in other institution, recommendation resulting from the difficulties that appeared at the stage of implementing good practice, some important information not included above etc. Suggest solutions for replicating the good practice in new contexts (particularly, in the context of partner countries) eg. For implement this practice the organization should have professional support from HR side.

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| **Persons responsible for description of good practice** |
| **Financial institution representative (if applicable)** |
| First name and last name\* |  |
| Are you belong to indicated groups in the institution implementing the good practice:(select all appropriate) \* | □ HR staff□ trade union□ employers’ associations□ other (please, specify) ……………………………………………………………………… |
| Position in the organisation\* |  |
| **Project *The European social dialogue and the development of the solidarity between generations of workers: focus on “over 55” and young workers in the finance sector. Sustainable Growth and generation* partner representative (if applicable)** |
| First name and last name\* |  |
| Country\* |  |
| The name of the partner institution\* |  |
| The date of preparation of the card\* |  |