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Good Practices in Social Security

Good practice in operation since: 2008

Generational management in the world of work (GeniAL) – Development of consultancy services by the information and advice centres of German Pension

A case of the German Federal Pension Insurance

German Federal Pension Insurance
Germany

Summary

Given the greying of Europe's work force and the European employment objective of keeping more older workers in work for longer, it is very important to be able to predict (regional) trends in population ageing and employment. This calls for new scientific perspectives and solutions tailored to the practical realities, for small and medium-sized enterprises (SMEs) in particular but for regional players too. The machinery and advisory structure of statutory pensions insurance in Germany covers the whole country and is thus particularly well placed to raise awareness of and provide advice on the problems of managing an ageing workforce. The close link here with the substance and practicalities of managing occupational safety and health, rehabilitation and integration is self-evident.

The aim of the pilot project "GeniAL – Generational management in the world of work" (the German acronym stands for "Generationenmanagement in Arbeitsleben“) is specifically to address issues of demographic change as they affect small and medium-sized enterprises (SMEs), which lack extensive staff resources. To find out which options, particularly for using advisory instruments to help businesses with age-appropriate employment, are available to the German Pension Insurance (DRV) and which of them look promising, the German Federal Pension Insurance (Deutsche Rentenversicherung Bund, DRV Bund) will be running a GeniAL practical trialling exercise nationwide in 21 DRV information and advice centres between 2008 and 2011, with the aim of making the project practicable for all pensions insurance institutions.

CRITERIA 1:

What was the issue/problem/challenge addressed by your good practice?

The practical trialling conducted as part of GeniAL focuses on processes of demographic change in small and medium-sized enterprises (SMEs), as these tend to have few or no staff management resources. Successful awareness-raising will be a preliminary to independent (preventive) measures which employers may subsequently take, for example organising work in an age-appropriate manner or designing workplaces in a way that safeguards workers' health.

The initiative mounted by DRV Bund to address the problems of demographic change is based on the following considerations:

- Which strategies for coping with demographic change can be usefully employed in the consultancy activities of DRV?
- What expert knowledge of analysis and methods of age-appropriate employment do the DRV staff concerned need?
- How can DRV's business contacts be used to raise awareness of specific issues?
- What overall contribution can DRV make in this way to help overcome the challenges of demographic change?

CRITERIA 2:

What were the main objectives and the expected outcomes?

The overall objective of GeniAL is this: how can consultancy services by DRV, normally provided to individuals, be made available to businesses along with advice which raises their awareness of demographic issues, so that small and medium-sized enterprises (SMEs) are more motivated to implement measures of age-appropriate employment (transfer of methods)?

The GeniAL project pursues three specific aims here:

1. to explore the possibilities and limitations of consultancy services in matters of (regional) demography and employment (integration of services);
2. to ascertain how it may be possible to create a regional guiding / interface function which helps businesses to manage demographic change (pooling and focusing, networking, moderating): and
3. to establish how the acquisition of competence in the process chain of business advice with a focus on demographic issues can be routinely organised (implementation, operational deployment).

CRITERIA 3:

What is the innovative approach/strategy followed to achieve the objectives?

The solution, and the innovative content of the GeniAL project, lies in combining existing advice structures, making the best possible use of resources, with an effective and scientifically backed transfer of methods to age-appropriate employment.

Access to businesses through the provision of consultancy services should be seen as a way of ensuring that the overlapping objectives of a sound policy on older workers and health become a firmly rooted part of the business culture. And it is a well known fact that these issues are especially prevalent in small and micro-businesses. Efforts to promote the health and employability of older workers (and awareness of how necessary they are) are also less common in such businesses. The expectation is that development of a range of consultancy services overseen by DRV and using existing resources will guarantee that advisory services are available across the board and that businesses are referred on to experts where appropriate.

CRITERIA 4:

Have the resources and inputs been used in an optimal way to implement the practice?

The 1 000 or so information and advice centres of our insurance institutions serve more than 34 million insured persons and pensioners and 3.3 million employers,

providing individual specialist advice. By adding a range of consultancy services on demographic issues to our information and advice centres in an effort to increase awareness of those issues by senior company personnel, we can have a direct input into how regional coping strategies are shaped and we can strengthen the service profile of DRV. The good name of DRV may also offer a way in to businesses that have so far resisted initiatives of this kind. If the range of DRV's services is offered constructively and early customers can be pointed, via networking and the guiding function which DRV aspires to perform, towards regionally based projects and other services available from, for example, the employment accident insurance funds, sickness funds or employment agencies.

CRITERIA 5:

What impact/results have been achieved so far?

The GeniAL approach is extremely sound and sustainable, incorporating a number of strategically sustainable elements right from the start:

- Development of consultancy skills in the various regions, for the provision of advice on age-appropriate employment and regional change to locally established firms seeking business start-up advice;
- Intensification of the idea of regional networking by players possessing the skills and resources to enable businesses to frame adequate responses to the demographic challenge in the region;
- Support in setting up a service for employers (and their workforces) in small and medium-sized enterprises;
- Establishment of an all-inclusive and constructive approach which makes GeniAL the cohesive force between different advisory and awareness-raising services, regional networking and permanent structures.

The first phase of GeniAL thus showed very clearly that its great strength lies in the fact that DRV advice centres already hold a wealth of information on businesses based in their region, obtained essentially from the routine advisory services they provide to insured employees in these businesses, namely advice on pensions and rehab. For the most part there are interlocutors in businesses who are familiar with the work of DRV and already cooperate with DRV advisors. This is an enormous strategic advantage compared with other projects because the DRV advisors have a body of clients whom they are already advising. All that is needed is the "next step" of a "business start-up consultation with a focus on the demographic challenge". There is no need here for costly and wearisome data collection of the kind that similarly placed projects have to perform. Assessment of the pilot phase and the significant and rapid success recorded in securing new business consultations during the first phase bear this out.

CRITERIA 6:

What lessons have been learned?

One step towards getting GeniAL advice included as part of routine advisory services was clearly achieved in the first phase of the project (1-12/2008): this was, firstly, ensuring that GeniAL advisors had a base of specialist knowledge and, secondly, that advisors were represented in and integrated into a regional network centred on issues of "employment, pensions, health and the economy". If DRV is to establish itself as a guide in the regions on how businesses can manage strategies for coping with demographic change, a careful and collective effort is needed to develop networks involving a range of relevant players, and external support services specific to each region and appropriate to requirements must be put in place. Between first consultation and actual implementation of measures within a business, the key factor is thus networking.

Experience gleaned from business consultations to date is as follows:

- Existing contacts held by DRV advice centres are an effective way of securing appointments for consultations;
- Regional information on the effects of demographic change on employment does a great deal to raise awareness;
- There is still work to be done on developing DRV advisors' management of individual cases in businesses (behind schedule);
- Employers are very receptive to in-house business "surgeries";
- Practical instruments (work coaching/*Impuls-Test*¹/assessment) are needed to set an endpoint to the consultation.

The following have been identified as specific areas for action during the second phase of GeniAL:

- Regional networking must be tailored even more closely to the range of services offered;
- Following mentored business consultations, consultancy skills must be developed further, with advisors organising their own work;
- Moderated exchanges of information, including further training, are still needed;
- Targets (company consultations / networking contacts / products) must be agreed on a regional basis;
- Further mentoring of DRV advisors is needed, to guide the change in pattern from pensions advice for individuals to advice for businesses with a focus on the demographic challenge (business advice visits).

¹ A test of stress (Molnar et al., 2002)

CRITERIA 7:**To what extent would your good practice be appropriate for replication by other social security institutions?**

The GeniAL project method can easily be replicated in cases where existing structures and business contacts can be used effectively and efficiently in communicating possible business strategies for coping with demographic change, so that workers and employers are made aware of measures they can take to prevent problems. In Germany half of the total workforce paying social security contributions work in firms with fewer than 50 employees, but it is precisely in small and medium-sized enterprises that there is a lack of measures to address the demographic challenge, so these have a greater need for professional advice and support. Neutral and competent advice from social security institutions can be most efficacious here when – as in Germany – the majority of the work force are employed in small businesses.