

Mature Age

Workforce Resource 2015



A framework of recommendations for the management and retention of mature talent in local government

FOCUS AREA 2.3

TRANSITIONAL EMPLOYMENT

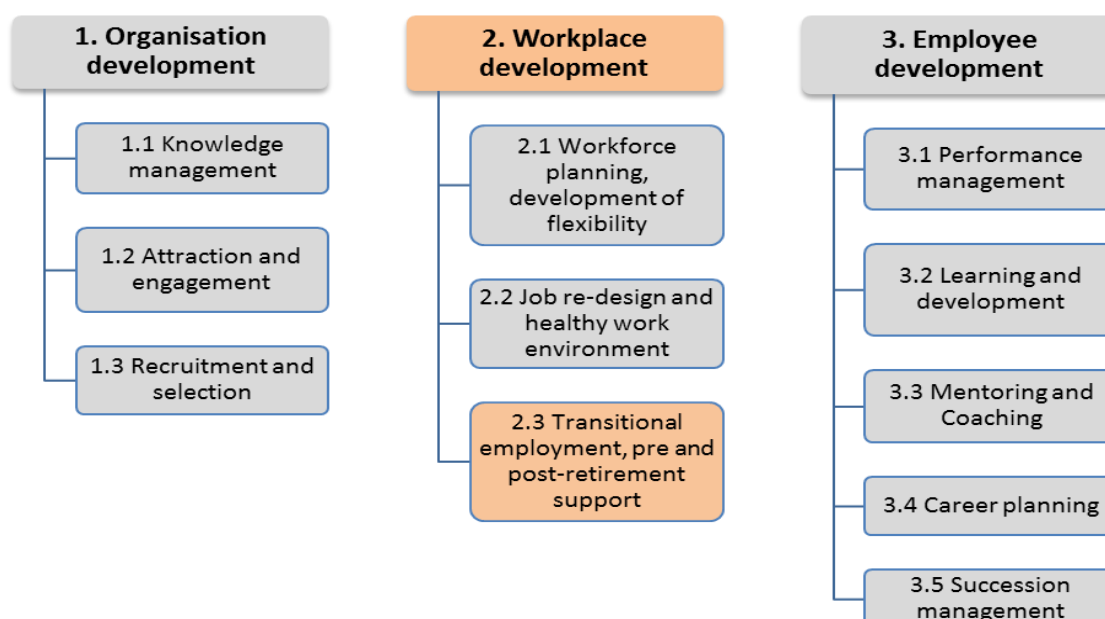
PRE- AND POST-RETIREMENT SUPPORT

The Toolkit is designed to be used by the Human Resources or Organisation Development (HR/OD) and leadership teams as they enhance their organisation's culture.

Suggested actions and strategies to help the mature age workforce may apply to the broader workforce as well and could contribute to fairer and more equitable work conditions and opportunities for all staff. Each organisation will already have in place human resource management policies and activities. It is not the intention of this toolkit to conflict with existing policies or actions. Rather, it can add value to the operations of the organisation by being used as stand-alone or integrated actions and initiatives.

Development initiatives are presented in a very broad way, with a set of actions identified as recommendations. Templates are not used in the Toolkit so that HR/OD practitioners can interpret recommendations in the most appropriate way that is aligned to existing initiatives.

There are many intended linkages and connections between the Focus Areas, which is an important factor as an aligned HR/OD strategy is developed and applied. The intention of the Toolkit is that work will be adapted and modified within each council organisation. Recommendations are not in any way intended to be prescriptive.



This Focus Area 2.3 of **Transitional Employment – pre- and post-retirement support** provides practical suggestions in how to enhance the workplace culture to enable mature aged workers to retire with respect while maintaining a sense of engagement with their work.

1. OVERVIEW – the need for change

The purpose of this Focus Area is to guide the initiation of a range of support services for mature age workers in pre- and post-retirement stages. It can also inform the implementation of planned and more sustainable transitional employment practices that lead to increased retention of productive, motivated and highly skilled mature age employees. Implementation of this Focus Area should take the mature age workers' wellbeing into account on all occasions.

Transitional employment arrangements (see below for full definition) are directly linked to the business strategy and delivery objectives of the council organisation and should provide business benefits as well as supporting the individual needs of employees. Transitional employment arrangements available to eligible employees can include:

- Flexible work arrangements;
- Job re-design (where job requirement allows);
- Targeted training and development;
- Job rotation, transfer and job sharing;
- Individualised career planning and development;
- Participation in workplace wellness programs;
- Involvement in mentoring and knowledge transfer initiatives;
- Post-retirement options – including re-engagement strategies.

2. ORGANISATIONAL OPTIONS TO HELP CULTURAL CHANGE

This Focus Area is designed to support employees who are:

- a) considering transitional employment;
- b) undertaking transitional employment;
- c) retirees interested in re-engaging in the workforce.

To be eligible for participation in transitional employment arrangements, employees should:

- Be permanent employees of the organisation;
- Be aged 45 years or over;
- Voluntarily identify for participation in transitional employment arrangements;
- Have agreed to formalise the terms and conditions of the transitional employment arrangement;
- Have evidenced competent work performance in annual employee development reviews;
- Have confirmation that the proposed transitional employment arrangement meets the business and operational needs of the organisation.

3. DEFINITIONS

Career advisor	Someone whose job it is to provide advice to employees about what jobs and professional training might be suitable for them, as it applies to mature age workers
Career guidance	Refers to services and activities intended to assist individuals of any age and at any point throughout their lives, to make educational, training and occupational choices
Career plan	A document that plans the desired ambition, the key steps to achieving the goal and the skills, knowledge and experience needed to progress the career goal
Retiree	A former employee who has retired from active work
Re-engaged retiree	A past employee seeking re-engagement opportunities on a short-term, contract or temporary basis
Transitional Employment	Generally defined as a period of time leading into retirement where employees gradually reduce their full-time work status through a variety of flexible work arrangements
Transition to Retirement (TTR)	A scheme that provides for eligible employees to access superannuation in the form of a transition to retirement pension which may enable employees to reduce work hours without reducing income

4. ACTIONS to address in this Focus Area include:

To maximise the opportunities to retain mature age workers, the organisation can provide a range of information and career development services that help to inform mature age workers about their future options. Whilst the organisation may not be able to directly provide the full range of services internally, they can provide support to employees in making contacts with various support agencies who might provide assistance.

Working on an as-needed-basis is proving to be a popular option for mature age employees in retirement. Short-term engagements on projects, relief work or high peak periods are the most common options for re-engaging retirees. The option to re-engage under these types of arrangements may also be cost effective to the organisation. There is great benefit in having a readily available, trained workforce and this employment process will demonstrate support of retired employees financially and support their move into final retirement.

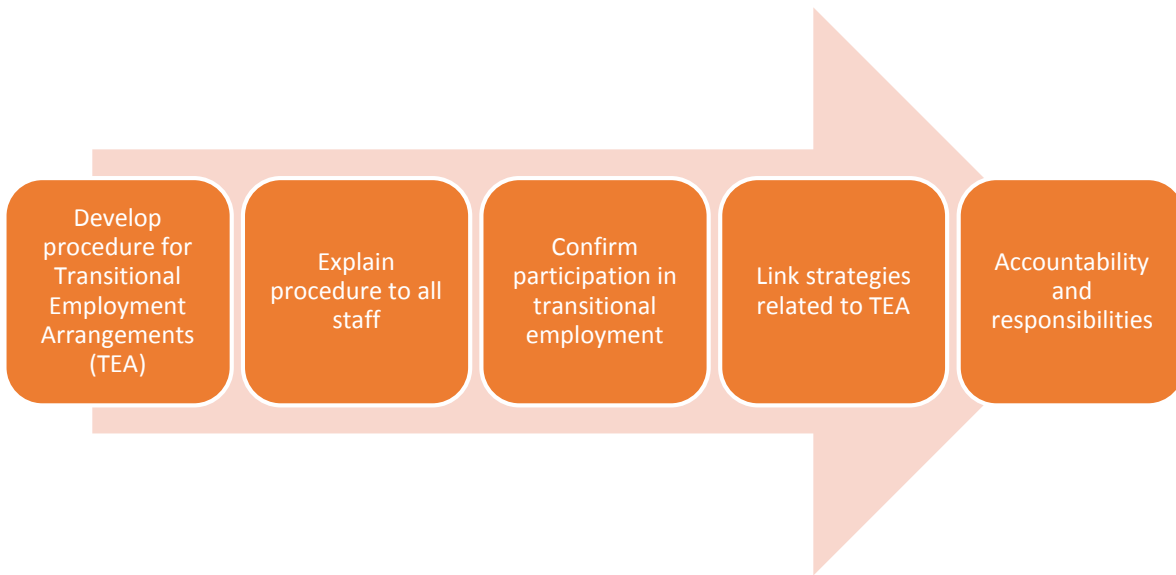
4.1 The four key strategies and actions in this Focus Area are:



<p>Information services</p>	<ul style="list-style-type: none"> ▪ Develop and implement a range of communication and information strategies to inform all staff of the opportunity for transitional employment ▪ Identify opportunities for professional services seminars – such as health, superannuation, financial planning ▪ Introduce a range of ‘lunch-box’ sessions where existing mature age, re-entering employees and managers / supervisors present ‘good practice’ experiences relating to participation in transitional retirement options
<p>Support services</p>	<ul style="list-style-type: none"> ▪ Identify and publicise the range of retirement planning and support services available to staff – internal and external to the organisation ▪ Provide a range of sessions on new skill development options, including mentoring, succession planning, etc (see relevant Focus Areas)
<p>Post-retirement options</p>	<ul style="list-style-type: none"> ▪ Develop a range of strategies and communication mediums to support individuals re-entering employment after retirement

Transitional employment arrangements should only be put in place where a business benefit to the organisation exists and where the proposed strategy supports the employee in balancing the demands of work-family-life commitments.

4.2 Actions to be taken to address Transitional Employment (TE) in particular can include:



Develop procedure for Transitional Employment Arrangements (TEA)

- Align with agreed values, principles and strategic objectives of council
- Confirm boundaries of transitional employment agreement
- Confirm employee and council participation and decision-making authorities
- Identify roles and responsibilities of parties to the TEA
- Confirm that TE arrangements do not create an inequitable or unfair workplace for any employee of your organisation due to positive discrimination practices

Explain procedure to all staff

- Clarify the interpretation, application and termination arrangements for TE
- Confirm TE is a voluntary participation arrangement
- Explain application and agreement process for participation in TE

Confirm participation in transitional employment

- Assess applications in consultation with mature age employees
- Negotiate individual TE agreements
- Confirm terms and conditions of TE arrangement
- Confirm flexible work arrangements in consultation with individuals
- Jointly develop a brief business case for approval

Link strategies related to TEA

- Develop a training and development plan to support TE arrangement
- Develop career path options and align development opportunities to the learning and development plan
- Identify opportunities for mentoring and coaching to increase skills and pass on skills to other members of staff

Accountability and responsibilities

- Identify managerial accountability for TE arrangements
- Confirm employee responsibilities when participating in TE arrangements

5. WHO CAN CONTRIBUTE TO CHANGING THE CULTURE?

- Senior Managers, Managers and the Human Resource Manager can consult with mature age workers and a cross-section of younger workers to gain insight into the types of information and strategies they would find valuable.
- Managers and Human Resources Managers may establish an assessment of the functional specification needs to develop the online sites to support mature age employees and retirees.
- Mature age employees and Managers can contribute to identifying communication needs.
- Managers can implement communication programs and provide access to mature age workers to participate in a range of information and career counselling activities.
- Managers and Human Resource staff may require professional development in career guidance activities.
- The CEO has the authority to approve transitional employment arrangements for council employees under his/her delegated authority. The CEO also has the authority to deny transitional employment arrangements in whole or part if:
 - the employee does not meet eligibility requirements;
 - reasonable business grounds exist.

6. POINTS TO CONSIDER WHEN ADDRESSING THIS FOCUS AREA

These notes are designed to support transparency, compliance and openness in addressing what can potentially be a difficult area of cultural change.

- Staff should be consulted to identify the range of pre-retirement services beneficial to supporting decisions regarding retirement.
- Develop a communications plan identifying a range of options for information dissemination to staff.
- Develop a re-engagement schedule for retirees interested in re-entering the workforce.
- Develop an online re-engagement network site, linked to job sharing information and job vacancies.
- Interested staff can attend information sessions outlining the transitional employment options available.
- Employees can discuss their interest and preferences with their manager or human resource management support service.
- All staff considering transitional employment arrangements should seek advice from their superannuation fund to confirm the impact of their choices on their superannuation or financial situation.
- All employee records should be maintained by the human resource management unit for privacy and confidentiality purposes.
- Transitional employment arrangements should be formally reviewed annually as part of the employee development review so that any changes can be agreed by both parties, with the changes documented and approved accordingly.
- A transitional employment agreement should indicate a pre-determined separation date. An agreed date should be confirmed at a minimum of twelve months prior to separation unless otherwise approved by the CEO.
- Transition to retirement agreements may include provision for relinquishment of an employee's substantive position. Relinquishment requires written agreement by the

employee to vacate their substantive position and either become 'unattached' (i.e. above establishment) or 'step down' to a lower level classification.

6.1 Review of transitional employment arrangements

- Review of TE arrangements can occur as part of the annual employee development review.
- The review can assess the effectiveness of the transitional employment strategies for council and the employee. The overall objective is that employees continue to perform effectively and work productively, and that the contribution supports the objectives of council.
- The review can consider all aspects of the individual's transitional employment action plan including but not limited to the agreed:
 - performance outcomes;
 - learning and development goals;
 - career development;
 - flexible work arrangements;
 - succession planning and/or knowledge transfer objectives;
 - mentoring or coaching contributions;
 - work performance;
 - health and wellness.

6.2 Superannuation benefits

Employees considering transitional employment arrangements should consult with their superannuation fund about the impact of any change in work arrangements and the impact this will have on their superannuation benefits. When making an application, employees should mark on the application form that professional advice was sought and they wish to proceed.