



MePlan50+ - Local Action Planning

MePlan50+ - Local Action Planning (slightly abbreviated)	1
PART 1	2
1 Initial Situation	2
1.1 ..in Germany	2
1.2 ..in Offenbach/Main.....	2
2 Actual Strategies.....	2
2.1 Well Proven Practices of European Companies.....	2
2.2 Actual Strategies at the Federal Level.....	2
2.2.1 Actions of the Federal Government in Detail:.....	2
2.2.2 Further Instruments	2
2.3 Actual Strategies of the Institutions	2
2.3.1 Initiative New Quality of Work - INQA.....	2
2.3.2 Instruments in the Companies.....	2
2.3.3 Awarding.....	2
2.4 The Situation in Offenbach/ Main	2
3 The Project MePlan	2
3.1 The Concept	2
3.1.1 Structure	2
3.1.2 Partners	2
3.1.3 Objectives.....	2
3.2 Local Action Plans - LAP	2
3.2.1 Preparatives for LAPs.....	2
3.2.2 Results of the interviews with the 50+ about their actual labour situation and about their personal visions for the future.....	2
3.2.3 Results of the Interviews with Companies about the Working Conditions of the 50+	2
3.2.4 IWAK	2
3.2.5 Fraunhofer Institute for Human Resources Management and Organisation (IAO) Report of Evaluations Results of: Chance 50+ - Performance Counts, April through May 2007, inquiry period: 16.04.2007	2



3.2.6. Consideration of the results of the federal evaluation of 62 BMAS funded employment pacts with regards to the first programme phase 50+	2
3.2.7 Demographic Consultancy for Companies	2
3.2.8 Adapting the Matrix into a Planning Instrument, Results	2
3.3 Summary of the Results	2
PART 2	2
4 Local action planning for Offenbach/ Main	2
4.1 Possible Approaches	2
4.2 Possible actions	2
4.2.1 Continuation of proven, good approaches	2
4.2.2 New approaches	2
4.3 Possible partners	2

PART 1

1 Initial Situation

1.1 ..in Germany

Due to the declining birth-rate in Germany, the percentage of younger workers in workforce decreases; meanwhile, the percentage of elder employees over 50 steadily increases.

At the same time, it is evident that over the past few years, a growing number of elder employees have retired early from their jobs, and a certain type of business culture has developed which favours the employment of a younger workforce. That is due to the tariff policy of the past years as well as to the change of image that has taken place since the 1950s with regard to the potential of elder employees: elder people were specified as less flexible in terms of regional and intellectual mobility, as slow, often sick and not interested in innovative developments.

In contrast, younger persons were described as dynamic, flexible and eager to learn.

This development, in combination with the demographic change described above, led to the initial situation that specific branches of the German economy complain about a considerable lack of workforce. Meanwhile, many companies lose the experience and expertise of their elder, retired workforce.

As a result of this, especially the bigger companies begin to revise their former decisions and latterly employ more elder employees again or try to retain them and to prepare them for the future challenges with advanced training.

Another problem associated with the decreasing number of elderly workforce and the simultaneously increasing life-span is the financing of pension funds, which cumulatively get into trouble.

Placement Barriers

In Germany it has been diagnosed, that elderly long term unemployed (LZA) are normally regarded as difficult to place. A mentionable number of the elderly LZA have a multitude of social, professional and/or health related placement hindrances. Many of the projects that are actually being implemented are based on this assumption.

The educational level of the elderly LZA is in many cases relatively low. However, an increasing educational level is gradually becoming evident.

Educational Level of the 50+ in Germany (in Thousands)							
Age	Elementary School	Primary + Secondary School of the Former GDR	Secondary Modern School	Advanced Technical College Entrance Qualification	High School Diploma	Not Specified	Non-Graduates
50 - 55	2389	759	951	297	976	37	180
55 - 60	2422	456	761	227	711	33	189
60 - 65	2957	171	806	222	624	40	165
65 - 70	3813	82	670	196	480	45	171
70 - 75	2753	29	408	92	283	40	169
75+	4825	24	746	122	498	158	241

1.2 ..in Offenbach/Main

The same pattern applies for Offenbach/Main. It is a former industrial area which now has many unemployed. It is extremely difficult to place these predominantly, low qualified individuals.

Nevertheless, the unemployment rate in Offenbach is nearly the same as the national average. This has substantially improved in the annual average: In July 2006 the unemployment rate in Offenbach was at 10.6% (national average 10.5%), in July 2007 it was at 8,9 %. Out of this group, 26 % were over 50 years old, adding up to 4075 individuals in July 2007 - this was 393 less people than in the same month of the previous year.

2 Actual Strategies

Since the mid-1990s, barriers and chances in the age management of companies are being analysed on European level. Even at that time, a documentation existed which contained a total of more than 150 case studies of "well proven practices". The studies had been made in the public as well as in the private sector, and included small, medium and large businesses. The "European Foundation for the Improvement of Living and Working Conditions" (EUROFOUND) has continuously observed these initiatives and has analysed its effects. The results are described in section 2.1

In 2005 the federal government has launched a package of measures in order to facilitate the integration of older employees into the job market. The package is currently being implemented regionally by the institutions and public authorities.

The package of measures and the projects resulting from it are described in section 2.2 and 2.3

2.1 Well Proven Practices of European Companies¹

¹ „Age management in European enterprises – European foundation for the Improvement of Living and Working Conditions EF/06/08/DE



The “European Foundation for the Improvement of Living and Working Conditions” (EUROFOUND) has carefully examined and analysed barriers and chances in the age management of companies since the mid-90s of the past century. The documentation “Well Proven Practices”, containing more than a 150 case studies, has continuously been observed and its effects have been analysed.

A more effective integration of the elder workforce into the job market is an essential pre-condition in order to improve the economic and social development of the European Union. Concerns about old age pension, economic growth and the future labour supply have triggered a couple of political recommendations and initiatives that focus on a longer working life and a higher retirement age.

It is assumed, that over the next 20 years the average age of the working population will increase and that the number of people capable of working will decrease.

The challenge, from the foundations point of view, is to improve and expand the qualifications as well as the employability of elder employees; and at the same time to sustain their health, motivation and productivity. Furthermore, the foundation emphasises that all discriminative action against older employees and the related negative stereotypes must be properly dealt with. As a third essential aspect, the foundation claims awareness of the labour condition and employment opportunities of an economically active population with a diversified age structure.

As a result of the study the following measures for European companies are introduced:

- Well proven practices of age management include special measures to fight age related barriers or support age-diversity
- However, these measures can come along with other measures that possibly can constrict the purpose
- A lot of enterprises, especially the bigger ones, have opted for an integrated concept: for example, a combination of flexible working hours with activities supporting health care.
- Most of the activities benefiting the elder workforce could be introduced at rather low costs.
- An integrated and comprehensive personnel policy with regards to active age management rarely takes place.
- These measures are geared to prevention – including aspects likeas to the sectors health, education, ergonomics, or compatibility of work and private life. On the other hand, they are geared to compensate for opportunities that have not been realised.

2.2 Actual Strategies at the Federal Level

In 2005, nationwide a yearly average of 1.2 million unemployed 50+ were registered, among them around 580,000 were older than 55.



The government wants to enhance the labour participation of the elderly workforce. The goal is to achieve the Lisbon Objective of the European Union and to have a 50% increase in the employment rate of those individuals who are older than 55. By doing this, Germany hopes to be in the vanguard of Europe by the year 2012.

The detailed goals of the German federal government are:

- to considerably reduce the number of early retirees among those 55+ and older.
- to improve the reintegration quota of the elderly workforce. The combined wages for older employees and the newly designed reintegration subsidies are expected to significantly help realise this goal.
- to have a significant increase of participation in advanced training, in order to be prepared for the rising demand in the job market and qualification requirements of tomorrow's labour market.

In order to achieve these goals, the Federal Minister for Labour and Social Affairs (BMAS) has presented some cornerstones in order to increase the employability and the employment opportunities of the older workforce. The main feature is a bundle of new as well as of proven, short and long term measures. These measures are to replace some of the previous less effective ones. The primary focus of this action hopes to minimise the administration efforts by the introduction of these instruments and measures. The respective impact of the several instruments will be monitored and evaluated in 2010.

The three cornerstones are:

- An increase of the legal age for retirement
- An obligatory private annuity insurance
- An initiative 50+ of the Federal Ministry for Labour and Social Affairs (BMAS)

2.2.1 Actions of the Federal Government in Detail:

Everything Relates to Everything²

“Who wants to assure wealth, provide jobs and secure the old age pensions must consider more than just jobs and a stable pension system.

Education, lifelong qualification and advanced training, a highly efficient health care system, research and innovative developments, mobility and modern communications technology, business start-ups and powerful entrepreneurial activities, solid public finances and a social as well as democratic federal state are conditions precedent in order to reach our targets.”

- The economic incentive for early retirement has considerably decreased due to the shortening of the payment period of unemployment benefits, and due to the actual increase of the retirement age, which resulted by discontinuing the 58er arrangement at the end of 2007. Through this the opportunities for companies to shape their own personnel policy at the expense of the social security system have been reduced, in particular for the bigger companies.
- The promotion of advanced training for employees in small and medium sized companies will continue and even be improved, in order to offer incentives for advanced training at an early stage. In the future, the expenses for advanced training

² quotation Website of the BMAS (German Ministry for Work and Sozial Affairs)

of employees will be refunded for employees 45+ years of age (so far it is refunded at 50+) and also in companies with up to 250 employees (currently: 100 employees). They get a voucher for advanced training, and have the free choice among the certified providers of advanced training measures.

- After their reintegration into the first labour market, older employees very often cannot achieve an income which is comparable to the income they used to get in their former job. In such a case, remuneration safeguarding is applied for older employees in form of the new combined wages. Older employees, with entitlement to unemployment compensation for at least 120 days, have a legal claim to partial compensation of the difference between the net wages they received before their unemployment and the net wages which they receive in their new job, when subject to social insurance contributions. The difference of the net wages is compensated by 50% in the first year and by 30% in the second year. In addition, the contributions to the statutory pension insurance, resulting from the new employment, are added on to 90% of the former contributions.
- In case they hire employees who are beyond their 50th year and continue their employment for at least one year, within the scope of administrative discretion, employers may obtain an integration grant in the future. The condition precedent to this is that the employed person has been unemployed for at least the last 6 months. Or that they have participated in certain measures on labour market policy grounds or that they have personal placement hindrances. Integration grants are paid to employers for at least one year and for a maximum of three years. They cover a minimum of 30% and a maximum of 50% of the labour costs. Further arrangements apply, in cases when particularly affected older, severely handicapped individuals are employed.
- The arrangement concerning temporary employment of employees over the age of 52 is reformed in conformity with the Community Law. Henceforth, unsubstantiated limitation of the work contract is allowed with the preconditions, that older employees have been unemployed for at least four months directly prior to the commencement of employment or that they have received transfer short time compensation or that they have attended a public-aided measure of employment promotion, such as a job creation measure. **The maximum duration of promotion at the same employer** will be limited to five years. The reformed statutory provisions comply with the guidelines given by the European Court of Justice (ECJ). In order to facilitate the contractual limitation of older employees, the ECJ demands to take in consideration their specific personal situation on the job market.
- Whenever employees receive a public grant in addition to their wages it is called “combined wages”. In this classical understanding of combined wages I³ suggested the following: Recipients of Unemployment Benefit 1 (ALG 1) with entitlement to unemployment compensation for at least 120 days who take up a new employment which, however, is paid far less compared with the last employment they had before becoming unemployed, receive a compensation. The net wages difference is compensated for 50% in the first year and for 30% in the second year, referring to the net wages. Their contribution to the statutory pension insurance will be continued to

³ the minister

be paid up to 90%. In addition, and this is new as well, this is not only a matter of residual claim valid for the duration of the right to unemployment benefits. But it is paid for 2 years. The benefit can be claimed repeatedly for affected individuals of this age-cohort.

- Irrespective of that, the **settling-in grant** (public grant to the employer) is specified. In principle an age of 50 or more years is regarded as a hindrance to job placement. Enterprises that hire such employees may receive an settling-in grant between 20% and 40% of the wages for a maximum of 2 years. However, only in case that the employment is continued for at least one year. This instrument is interpreted within the scope of administrative discretion and thus remains controllable in its dimensions.
- The federal project “30,000 Extra Jobs for People Older Than 58 Years of Age” promotes job opportunities with compensation for additional expenses (supplementary jobs) for a duration of up to three years. It is an alternative to unemployment during the transition period between job and retirement. If the resources for promotion are not exhausted by the end of 2006, the option of extending the programme will be checked.
- In the public services as well, the chances and capacities for employment of elderly people shall be improved by taking effective measures. The goal is, to keep elderly public servants in the working process for a longer time and to facilitate the engagement of elderly people into the public services. Against the background of this objective, the federal government and the federal states will deliberate on the question of suitable instruments that will help realise this goal. In comparison with the private sector, the quota of employed elderly in the public sector is much higher. This, and the own legislative competence of the federal states will have to be considered. These goals can only be achieved by joint efforts of policy, economy and further social actors. These joint efforts are supported, above all by the initiative “Experience is Future”. Comprehensive and department spanning efforts remain mandatory for the federal government. All activities in the fields of actions such as quality of work, workplace healthcare, abatement of age discrimination and organisation of working time will have to be considered and to be proven. For the initiative 50+ is not limited to labour market policy measures or to measures referring to labour legislation only.

2.2.2 Further Instruments

The further important instruments in the range of the 50+ initiative are:

- The special **programme in 62 regions, “Perspective 50plus – Regional Employment Pacts”**. This programme is a special approach to older employees and is equipped with 250 million Euros.
- INQA, the initiative for good work, is to be continued.

2.3 Actual Strategies of the Institutions

First and foremost in the course of the programme “Perspective50+”, since 2006 the institutions have realised numerous projects related to the reintegration of older workers into the job market and continue to do so.

The ideas competition “Employment Pact for Older Workers in the Regions” was launched already in June 2005. In the framework of special programmes the employment situation of



the older workers could be improved locally by innovative and creative measures. 276 supporting organisations responsible for basic social security from all over Germany took part in the competition. 62 regional projects were chosen and awarded. In order to realise their ideas on their own responsibility, they will now get 240 million Euros in accordance with the budget of a federal support programme.

The federal programme concentrates the pilot-projects of the 62 regions. The regional supporting organisations as regards to the implementation of their measures are monitored and attended by the federal ministry as well as by an external consultancy. It is an essential component of the programme, that the awarded prize winners cooperate and learn from one another when implementing their projects. This will improve the promotion of employment for older workers and thus finally set new stimuli to the employment policy altogether. The projects will be evaluated comprehensively by an external, independent party, especially in order to control success and the consumption of resources.

Goals of the Initiative 50plus

The initiative 50+ is aiming to achieve a change of attitude. Even older individuals have the right to participate in the working life. In Germany's economic future, the expertise, experience and competence of older workers is greatly needed in order to be able to successfully economise. It is essential that old age be accepted as a productive phase of life. And it is in the best interest of companies, to maintain the working capacity of their elder employees, in order to successfully compete even with an ageing workforce.

The initiative 50plus has four main targets:

to continuously enhance the labour participation of the older workers. The Lisbon objective of the European Union shall be achieved by the year 2010 by making a 50% increase in the employment rate and labour participation of workers older than 55 years. By reaching this goal, Germany hopes to be in the vanguard of Europe by 2012. During the 2 years of implementation, the pilot-projects will be monitored and evaluated. A lot of attention is placed on education and the intensification of regional networks and the transregional exchange of ideas, information and experiences. The concerned project partners participate in regional workshops where they share a common communication platform to support this process. Such structures like these can arise which support the integration of older workers into the job market and which extends beyond the limits of the two year project duration and beyond the boundaries of the respective regions. Additionally, the most successful projects can be the foundation for federal strategies and solutions which is why it is referred to as "best practice".

Various Approaches

It is remarkable to observe the multitude of approaches that are supported by the project "Perspective 50plus". Some projects aim to intensify the cooperation among the regional actors, in order to create more jobs for older workers. For this purpose, regional associations were founded and regional alliances were formed. Other pacts have other focal points. Some addressed the employers directly in order to encourage them to employ older individuals. And others had "core ideas", such as deliberately linking environmental targets with labour market policy targets, for example with regards to the housing industry or to the sector of renewable primary products. In addition, the federal government created a positive framework by launching a 25 billion Euros capital expenditure programme in order to support science, research and innovation. And finally, some pacts try out new instruments or test an



innovative combination of instruments. This all results to effective integration strategies for older individuals.

2.3.1 Initiative New Quality of Work - INQA

Good working conditions are a basic precondition so that individuals in Germany can – and want – to work longer again. The “Initiative New Quality of Work” (INQA) supports companies and administrations in shaping modern and age-based working conditions. To realise this it is necessary to invest resources on increasing the amount of employee health care and skill improvement. It encourages picking up and taking along every employee, despite age and technical knowledge, in cases where there are changes in the technical framework, new ways of communication or new in-company organisation – no one should be left behind, due to age factors. In the long run only a healthy, well informed, and motivated staff can allow it to create the innovative products and services, that help our enterprises to meet the market demands and to persist in global competence.

In order to promote and improve the employability and capacity of older workers to work, the supporting organisations of INQA with the – federal government, federal states, social partners, social insurance institutions, foundations and the companies – develop solutions by themselves about how to create and identify examples of best practice. It is the utmost concern of INQA, to support as many companies as possible in the application and use of innovative and staff oriented solutions in order to promote cross-company exchange of experiences.

The federal government supports all these activities and will have a share in the success of the joint initiatives.

2.3.2 Instruments in the Companies

Companies invest early into the fitness of their staff; because they know that physical and mental health are a basic precondition for longer lasting motivation and performance. Companies that focus on older employees are examples for economic success. They have content employees and good balance sheets.

Local authorities develop social networks to deal with the demographic changes of the population. This results in diverse solutions in the local public transport, cultural offers, meeting points and many more helpful ideas develop. Senior friendly housing are humane for those affected and valuable for the society.

Elder individuals are eager to discover innovative models of living. Living together at an old age might be a better alternative than the widespread isolation and loneliness which seniors often face in our current society.

Nowadays questions of OAP suitability and barrier free accessibility have become more important. The companies develop products that do not only meet the needs of the under 45 target group, but are tailored to meet the consumer needs of the seniors as well. The vast potential of a new market for seniors is being developed and it offers new job opportunities.

In the voluntary sector there are many initiatives by older individuals who share their experiences and allow the younger generation to take advantage of their knowledge. For example, these are social groups as well as so called “Business Angels”, former business men and women who help younger business start-ups to launch their companies.



Senior care, in general, needs a lot of improvement as well. Concepts are needed to help senior citizens manage their wealth of time in such a manner that those individuals in need of care are given the opportunity to live a life in dignity. Here it is of great importance to consider the role which the respective family plays along with the complementary service offers.

2.3.3 Awarding

Within the framework of the federal programme “Perspective 50plus - Employment Pacts for Elderly Individuals in the Regions” 62 companies have been awarded a prize and honoured as *VISIONARY ENTERPRISES*. They have been awarded as the representatives of all the other companies participating in the 62 employment pacts that have proven extraordinary commitment and dedication.

In the personnel policy of the *VISIONARY ENTERPRISES* they have had successful and appropriate experiences with an ageing workforce or with the employment of older workers. This includes the following: measures in order to maintain the employability, creation of opportunities for a smooth transition to flexible working hours, and proposals and offers regarding the improvement of the personal qualifications of older individuals as well.

The companies awarded as *VISIONARY ENTERPRISES* have met the requirements of the demographic changes and all the related challenges with their active and successful management. They have substantially contributed to the improvement of employment chances for older workers.

Appropriate measures are implemented in the following areas:

Advanced training and qualification

- Professional training, advanced training and qualifications of older workers as skilled labour in branch specific fields or activities.

Tasks and scope of functions

- Preservation of employability: systematic job rotation and alternation of strain, in order to be able to try out alternative fields of activities in case of reduced capacity by swapping between the respective fields of activities.
- Individual human engineering of the respective work places to the personal needs and preconditions of the employees
- Integration of older workers into the company as sponsors and mentors.

Organisation of the working hours

- flexibility of the work time models and part-time work

Workplace design

- Consideration of health relevant aspects, such as ergonomic aspects, safety and workplace environment.

In-house health management



- Execution of preventive health care programmes, for example in cooperation with health insurance companies, support of activities and direct offers for company facilitated sports activities.
- Health training
- Nutritional advice
- Anti-stress training

2.4 The Situation in Offenbach/ Main

In Offenbach various measures are being tested in an attempt to reintegrate older unemployed into the job market.

Here in particular the project “Chance 50 plus” is to be mentioned. It is one of 62 innovate local projects that is being supported for over 2 years by BMAS funds. The project has the goal of using new active approaches to mobilise older individuals as well as to improve their integration into businesses.

Chance 50 plus has a number of sub-projects. The measures to mobilise older workers extend from individual profiling over to measures to restore or maintain one’s health, and includes placement in the 1st or 2nd job market or in a volunteer position, through a Job Club the unemployed have the possibility for exchange and self-activation is offered as well as part of a sub-project – the long term unemployed are offered cooperative structures with a safe framework to help simplify the start into self-employment.

This project is regularly being evaluated from a big institute, so it delivers a good data base even for this report.

Employment Pact for Older Workers in Offenbach

Combats long-term unemployment of older workers and encourages the reintegration into employment through the development of regional solutions and the support of proposals from regional initiatives of the MainArbeit GmbH, Offenbach on the Main.

Actors of the Offenbach Employment Pact are:

- MainArbeit GmbH, Offenbach, Hessen, Germany.
- Offenbach Public Training and Job Creation Company GmbH
- Offenbach Local City and County Council of Skilled Crafts
- Institute for Economy, Employment, and Culture, Frankfurt am Main
- KIZ AG, Centre for Business Start-ups Offenbach
- Concept Five, Agency for Graphic Design and Advertisement
- Volunteer Centre of Offenbach / Freiwilligenzentrum Offenbach (FzOF), c/o charity
- Randstad Deutschland GmbH & Co. KG
- Offenbach Chambers of Industry and Commerce
- City of Offenbach
- Self-learning Centre Offenbach
- Various individual companies that are willing to partake in an exchange of experiences and try to find strategies that will help open up the job market to older workers.



The project is founded upon the experiences made in Offenbach up to this point. The many years of experience in local employment promotion and in job placement of older workers reveals that there definitely are some businesses that rather place greater value on the personal skills and technical expertise of their staff than the age factor. There were also recognisable work activities which were especially appropriate for older workers due to their extensive amount of expertise and knowledge.

This is true in the areas of security, caretaking, household management, and call centers.

Furthermore, one could assume, that the increasing age of consumers would call for an increase in the demand for older sales personnel amongst the different branches.

MainArbeit GmbH has successfully taken over aspects of the local employment promotion in their work and has continued to develop it in cooperation with the competencies of the employment agency. During the implementation of the employment pact for older workers, MainArbeit gathered loads of experience by testing the local, innovative, solution approaches. Therefore within a short time period, they found themselves capable of mobilizing regional networks.

In particular, the network is made up of the following participants:

- City of Founders Offenbach
- Equal-Development Partnership and Rhein-Main Employment for Migrants (M.A.R.E.) / Equal-Entwicklungspartnerschaft Migration und Arbeit Rhein-Main (M.A.R.E.) für Migranten und Migrantinnen
- Network of Open Learning – Learning Region Offenbach / Netzwerk Offenes Lernen - Lernende Region Offenbach
- Self-learning Centre /Selbstlernzentrum
- EXZEPT: New Structure for Newly Self-Employed
- New Business Start-ups

The goal of the Offenbach Employment Pact should be to improve the conditions of the Offenbach job market for the target group 50+. Business start-ups are possibilities to be considered, along with creating ones own job (job creation). Overall it is about reducing the unemployment rate among the 50+ sector by increasing their labour participation. In many cases the ability to work must first be established. An expressed goal of the employment pact of Offenbach, besides the combating of long-term unemployed of older workers by reintegration into the job market, is the development of a regional network where the idea of employing elder workers is positively represented and businesses get actively involved. This network should assure the optimization of the personnel services of job placement, business start-up consultation, and qualifications related to the target group. They will accomplish this goal by learning from the collective experiences from the various workforce actors (such as, human resources, businesses, temporary employment agencies, chamber of industry and commerce, business start-up consultancies, etc.) so that new models can be proven and tried out. The creation of additional jobs in the region was another goal of the employment pact.

These goals of the Offenbach employment pact have resulted in the following measures:



Active Measures

Change of Awareness

Older unemployed are confronted with a lot of prejudice. Therefore it is necessary to contribute to a change of awareness:

- Businesses should be made aware that older unemployed are capable of working.
- Older unemployed should be encouraged to compete for their own integration into the workforce.
- The integration promotion and job creation element of the Offenbacher employment pact has established a special PR campaign designated for unemployed and businesses.

Optimisation of Consultation and Support

The strategies for reintegration of older unemployed into the job market must consider aspects of job supply and demand and deal with the critical issues.

On the supply side of the labour market these critical factors are the competencies and motivation terms and conditions, and on the demand side the conditions for hiring long term unemployed. Promotion processes such as profiling, qualifications, placement services and business start-up consultation are more effective when they are involved in a network of relevant, employment political actors in which ideal quality standards are developed for each step in meeting the needs of older unemployed.

Creation of Additional Job Possibilities

Beyond this, it was always a goal of Offenbach's politics to expand employment opportunities in the region, where consulting and placement activities reach their limits in a limited job market. An interesting aspect of job creation is the business start-ups, when an unemployed person can found his own business and produce his own workplace and offer further jobs for employees.

Active Citizenship & Volunteer Work

Not every older, unemployed person can be reintegrated into the regular workforce. In such cases it is important to avoid social isolation and alienation, which could eventually lead to illness and addictions that have a negative impact on the social system. Measures for active citizenship can be a way out; however, it does not lead to an income: volunteer work builds up one's self-image and identity and it helps one meaningfully invest their time.

The Overview of the Sub-Projects

Within the framework of the Offenbach employment pact for older workers, 10 operational sub-projects were started, which are categorised in the following measures:

Measure to "Change Awareness"

Sub-Project 1:

This sub-project is based upon the following situation:

- The number of unemployed between the ages of 55-65 is very high and continues to increase.
- Many older unemployed still are in good or satisfactory state of health.
- The subjective attitude of many older workers is still influenced by an outdated disposition of early retirement.
- Businesses like to often voice their preferences for older workers in questionnaires. However, the personnel politic is often focused on the removal of older employees.



Older unemployed are often not really intensive job-seekers, but rather pension-seekers. Without a change in this attitude, through material pressure, employment adjustments or both, the work integration will only have a limited success.

In order to create a positive awareness in relation to the reintegration of older workers a communications strategy was developed and accompanies the project in every phase.

Measure “Optimisation of Consultation and Support”

Sub-Project 2: “Profiling – Resource Oriented Consultation for Individuals and Placement”

In this sub-project various goals were pursued for the unemployed as well as for the overall project:

- Profiling and placement / coaching
- Realising new job perspectives, new orientation
- Direct access to job placement services, assisted placement, temporary work, and group offers
- Business start-up consultation, adjusting to qualification demands, work in volunteer positions
- Identify and adjust to changes in skill requirements
- Review the situation of the pool of older workers
- Avoid the abuse of services
- Acquisition and maintenance of business contacts
- Improve the quality standards of the profiling of older people

Conceptually, the sub project values the unique potential of older individuals. It wants to identify and be aware of their potentials and deficits along with the company demands, in order to comply with the goal of the employment pact by starting a resource overview – which will also serve the purposes of ARGE.

Sub-Project 3: “Profiling in Group Activities and in Basic Training”

Group activities appear to be of significant importance and necessary for older participants, because in this group the failure of finding a job and negative experiences related to it have led to substantially low self-esteems. A new overview or modification of employment perspectives are needed. This also applies to the large group of low qualified workers. Especially for migrants the special group offers have been successful.

Sub-Project 4: Survey and Activation of Businesses

At the beginning of the project there was no systematic information about under what conditions the businesses in Offenbach would be willing to employ an older person. Moreover, there was only occasional and isolated business contacts and indicators available about under what special conditions a business would hire a long term unemployed person.

For this reason, at the beginning of the project, there was a representative business survey made covering Offenbach’s relevant, regional job market. Surveys were made primarily in the city and county of Offenbach and in the city of Frankfurt.

By these means valuable information was obtained about businesses terms for hiring and their views related to older unemployed. This information was taken into consideration when using and implementing the various instruments of the employment pact. At the same time, amongst the surveyed businesses an increased awareness of issues related to older workers took place.

The following aspects were addressed: Skills and qualifications, language skills, physical and mental abilities as well as eventual needs for financial support in cases elder workers. To address the situation of the employment of older people, such questions were considered: Have the businesses, currently or in the past years, hired older workers? What experiences did they gather?

Sub-Project 5: Integration through Temporary Work Agencies

With the temporary work agency and employee takeover firm Randstad a concept was developed which allows workers to be loaned out in hope that they will eventually be taken over and hired as fixed employees due to the “bonding effect”. This project has not started, because the suggestion was not proven.

Active Measures “Additional Job Creation Possibilities”

Sub-Project 6: From 0 to 1 with 50+

Many business founders have, after the initial starting up challenges, a good potential of being a “new employer”. According to the surveys of the IAB of 1998, every new business produces a new job after 3 years. However, the new entrepreneur is cautious to take the high risk and responsibility of an employee.

Therefore, this sub-project is aimed at reducing the hurdles and hardships for the young businesses owners, in order to produce the first job for someone out of the target group 50+. Also this sub-project did not meet the set standards and was stopped.

Sub-Project 7: Founding together in cooperatives, later „Firms-Works“

A business start-up is a significant alternative to unemployment, although in relation to older individuals particular aspects must be addressed.

- Older unemployed often have a problem with their ability to adjust. They formally accept and agree that a new beginning must bring changes with it, but mentally they don't accept it. They have difficulties to realize the multiple functions of a modern business.
- It is also difficult for individuals before and after the foundation of their own business. After nearly 30 years of work experience as an employee, it is difficult to adjust without an “Employer” as a social and economical framework.

Therefore, establishments are needed to deal properly with these issues. It is essential to strengthen the business potential of those over 50 and at the same time to successfully handle the emotional demands of the workplace.

Sub-Project 8: Founding Businesses with 50+, later changed to “Project 512”

At the beginning of this project it was an assumption that within the target group 50+ there was enough job seekers who had the potential to become self-employed, but who did not realize it. It was assumed that these people would required long term support structures, but were basically motivated to take their future into their own hands.

These assumptions could not be proven, at least not for the majority of the job seekers. It turned out that the majority of the target group has hesitations that hinder them from becoming self-employed. That is why the concept was changed at that point. From this point on, intensive efforts were exerted to re-establish working abilities through health programmes. The job seekers were then supported by intensive profiling and coaching and encourages to earn their “first 512 Euros” by themselves. This step was aimed at



strengthening the self-esteem and sense of self-value of the participants, so they could even possibly be integrated into the job market.

Sub-Project 9: Use the Advantages of Older Workers for Handcrafts and Trades

In general, handcraft businesses are interested in the target group 50+, for they are more skilled with their hands. Even low qualified workers can be usefully integrated in trade and handcraft businesses. The sub-project recognised the need for more personnel in such businesses and has contributed to the creation of additional jobs in individual trade and handcraft companies where there was a serious shortage of personnel.

Active Measure “Active Citizenship”

Sub-Project 10: Volunteer Work as an Instrument to Strengthen Competence

In the Netherlands under the understanding of the term “active citizenship” an individual who no longer has a group of relation to the society will be provided with assistance to help find a volunteer position with a year. By doing so there is often a combination of complex factors that have to be dealt with, such as: low education level, poor language skills, health problem costs, etc.

The volunteer centre of Offenbach has broad experience in helping unemployed to find work opportunities that are meaningful tasks that help maintain and expand their skills and abilities. These experiences should be proactive. An employee from the Netherlands who has gathered many years of experience in the volunteer centre of Arnheim, Netherlands has proven to be a stable partner for an effective exchange of knowledge and experience regarding the various aspects of active citizenship and volunteer work.

Later the 11th Sub-Project was added: “Job Club”

The Job Club is a basic offer for jobseekers, where joint support is provided to assist in the production and process of filling out the application documents, and assist in finding the appropriate job offer. The network formation is brought together at this point.

Parallel to these measures, the complete project is supportively evaluated by the Fraunhofer-Institute for Job Economics and Organisation / Fraunhofer-Institut für Arbeitswirtschaft und Organisation IAO. This institute supports businesses by helping them recognise potential, innovative, and more effective forms of organisation. These innovate forms of organisation are adjusted to the specific needs of the business and are consequently employed. The institute had extensive amounts of experience in management and in the evaluation of bigger project networks.

3 The Project MePlan

3.1 The Concept

The project is a partnership of 11 institutions from Germany, Wales and Ireland. All partner institutions deal with the central topic “Active Citizenship” for individuals over 50 years of age in their respective regions.

The main focus of the project is to allow and facilitate the active participation for the over 50s in the economic and social life of their regions. For that, different sub-projects have been developed. Every institution and every country will select its own focal points for its particular activities.



The activities are based on a “best practice model” research that has been implemented during the launch period of the project in the different regions as well as on a field investigation with questionnaires for employers and for over 50s (employees, unemployed, self employed, others).

3.1.1 Structure

For the entire project with 11 partners in three countries, from Oct. 1st, 2006 until Oct. 31st, 2008 the over all sum of 1,980,167.35 € is available.

The project is structured into the following components:

1. Project management
2. Development of action plans that support recruitment, employment, self employment, volunteering for 50+
3. Development of employment strategies for older workforce together with organisations (Age-Management-Strategies and working practices)
4. Development of target group specific measures (events, initiatives, trainings) with the objective, to improve self confidence, motivation and general confidence as well as to develop the necessary skills for employment, self employment and volunteering.
5. On-going monitoring and evaluation
6. Dissemination and mainstreaming

All results will be documented in detail, evaluated and disseminated among all partners. Target is, to share experiences, lessons learned and knowledge, to identify good practice and to adapt it, to replicate it and to identify the necessary framework needed to implement these good practice models.

3.1.2 Partners

Over all, 11 partners have a stake in the project.

- NGCCEI (Newport and Gwent Chamber of Commerce, Enterprise and Industry), as beneficiary
- 3 more partners in Wales: Monmouthshire County Council, Gwent Association of Voluntary Organisations, Prime Cymru
- 4 partners in Ireland: Westmeath Employment Pact, National Counselling Institute of Ireland, Department of Social and Family Affairs, Midlands Regional Authority
- 3 partners in Germany: City of Offenbach, MainArbeit GmbH, KIZ GmbH

3.1.3 Objectives

Focal point of the project MePlan is to reintegrate older workers into the workforce and to secure the jobs of the 50+ by developing work and employment opportunities. This shall be achieved by the use of the process “life planning”

Together with older individuals, employees and other providers, the three national partnerships will develop a variety of projects that identify the barriers for the older workforce related to accessing to and staying in the job.

It is intended to achieve a cultural change and a change in behaviour of the employers and the employees by effectuating a policy development and sensitisation of employers as well



as of employees. A strategy for “active aging” by ongoing employment, self employment and volunteering shall be initialised.

As their contribution and result of their common framework programme, the partners intend to achieve an increase of new employment, an increase in continued employment and an increase of reintegration of older workers.

This will be achieved by:

- A comparison of the current programmes in the three countries and in the regions
- Identification of the needs of the target group and disclosure of the gaps in regard to supply of support structures for employment as well as for self employment and for volunteering
- Development of local action plans and start projects for their implementation

The instrument needed to do so is the Foundation Matrix that has been revised, improved, amplified and adapted to the needs of the target group by the project MePlan 50+

The final product of the project will be the local action plans that specify supportive measures to promote the employment of an elder workforce. In addition, there will be a set of innovative pilot projects (together with organisations and individuals) in order to implement the action plans.

3.2 Local Action Plans - LAP

The National Action Plans (NAP) derive from the European Employment Strategy (EES) and its “guidelines for employment policy” and its respective focal activities. The National Action Plans (NAP) shall be supplemented by the Local Action Plans (LAP)

The Local Action Plans (LAP) help to develop a strategy in order to manage the challenges of the conversion of the labour market. This shall be effectuated on a local basis and together with the regional partners in politics, administration and civil society.

In addition, on national as well as on European level, they shall stimulate the discussion about the different approaches, in order to make them comparable and to mainstream best practices.

Each of the project partners from the three regions Offenbach, Wales (UK) and Westmeath (Ireland) ought to make their own, specific Local Action Plan (LAP)

3.2.1 Preparatives for LAPs

In order to be able to realise a local action planning, a comprehensive inquiry that was targeted at projects conducted on national level was followed through with already in the prophase of the project..

Later on, in all three countries interviews were made with people who are older than 45, all according to the same scheme. It was the aim of this inquiry, to gain more detailed information and data about the working conditions, preferences and desires related to the working conditions in the later years, possible exit strategies and individual perspectives and preoccupations and so on....



A similar inquiry was made with a small group of enterprises. They were interviewed about possible existing special regulations that are intended to benefit the older workers.

Other studies and reports were revised and sorted regarding the questions mentioned above.

3.2.2 Results of the interviews with the 50+ about their actual labour situation and about their personal visions for the future⁴

25 persons from Hesse, Bavaria, Berlin and North Rhine-Westphalia have taken part in the first set of interviews.

Of these 14 were women and 11 men.

13 employees (part and full time), 9 self employed, 2 individuals were employed and self employed at the same time, 1 individual was retired.

The age structure of the interviewed individuals is as follows:

Number	Age
10	46-50
3	51-55
8	56-60
2	61-65
2	66-70

The respective highest educational level achieved is:

Graduation	Number of Individuals
University	13
Vocational diploma	3
High school diploma	2
Trade	3
Secondary school	4

Age of retirement

When asked at what age they wanted to retire, the answers were from 55 to 70 years of age.

One individual wants to retire "immediately", 2 are already retired although one of them is employed for 15 hours/part time /week. 4 individuals want to retire completely when getting their pension, 4 want to carry on working as volunteers, 6 of them did not give particulars, the remainder wants to look for another job.

9 individuals could imagine to work on a self-employed basis, in case their existing employment would end.

Planning of the Future

14 individuals suppose, that they would need further information and support in order to develop their future strategy and life planning. 5 of them declare, that there is already a lot of

⁴ Questionnaire in the attachment



assistance, but all in all not enough. 4 individuals declare, that they have all the necessary information and support.

On the other hand, only one out of 25 interviewed thinks that he lacks the experience necessary to cope with the future, 24 of them positively think that they are absolutely skilled to cope with the future. Besides 4 of the individuals asked, all the other ones are basically disposed to additional vocational training after retirement.

Retirement

6 of the questioned individuals are looking forward to retirement, 2 “cannot hardly wait until the day of their retirement”. Another 6 think their actual status is “quite OK”, 5 have “slight apprehensions” because of economical reasons, 1 person is “very preoccupied”. 4 individuals suppose that they will never ever be able to quit working, 1 person is already retired and without any further occupation.

On the question, what could motivate the people interviewed to keep on working after retirement, 2 individuals answered, that there is absolutely nothing that could motivate them. 7 said that an interesting job could attract them, 5 can imagine to keep on working because of economical needs. Other attractive motivations are: to take over responsibility, find a good part time job, have fun, stay physically fit, to continue self employment, to have a flexible and independent time management, and to not HAVE to work but only to work when feeling like it. 14 of the interviewees would consider part time work, 4 other ones would consider it under certain conditions.

5 individuals think, that they will get enough pension, 18 interviewees say that they will not. All in all, only 5 of the interviewed individuals have their own plan or exit strategy to quit work life. Two of these want to reduce their workload step by step, one of these refers to the provided financial old age security as exit strategy.

Appreciation of Older Workers

12 of the interviewees think, that employers value the experience of those workers over the age of 50. 9 of them do not think so and 3 of them think, that only some of the employers value the experience of the older employees. Some of the interviewed individuals made suggestions, how to improve the appreciation of the older workers: different measures of sensitisation, campaigns, more information about the strengths of the 50+, mentoring programmes and, last but not least, a senior consultant programme were proposed.

17 of the interviewees think, that at least some of the employers treat the applications of older workers equal to the applications of younger ones, at least sometimes. 7 of them think that “definitely none of them do so”.

According to the interviewees, the reason for that is the employers presumption that older employees are longer sick, that they are more expensive and that the employers fear, that the older workers are less skilled personnel. Regarding all this, they suppose to drop the age related income differentiation, to consider the real qualification more than the data based qualification when hiring new staff and to initiate a relevant change of awareness regarding the topic older workers and its advantages.

Older Workers in Enterprises



17 of the interviewed individuals responded „No“ when asked if employers were offering flexible working arrangements for older workforce, 3 responded “Yes” and 3 responded “Some of them”.

When asked about the “Main issues facing you in the future” in relation to future employments, the questioned individuals answered that: “It is necessary to be prepared for more flexible systems in terms of time and payment”, “Less income”, “More part time jobs”, “Shorter duration of contracts” and “faster dismissal”. In addition, they estimated to be confronted with “more pressure of competition”, “more stress” and “more pressure in general” and that it would be necessary to be more open for new developments and to be ready and willing for vocational training.

Volunteering

12 individuals are actually volunteering for 1 to 10 hours a week. 13 are not volunteering in any way. But 7 of these could imagine, to be volunteering in the future. The engagements happen in all parts of the society, whether it be in social, political, ecological, sports or church related and/ or artistic societies, networks and parties. Reasons to carry on with volunteering in the future as well are: social engagement, to do something together with others, to do something meaningful, to do something interesting and ambitious, and to train ones brain.

General Questions

9 interviewees say, that society values older employees, 12 disagree it. 2/3rds of the interviewed individuals know to whom they can address themselves in case they have any questions about job opportunities, self employment or voluntary service.

Summary

- The majority of the interviewed individuals wants to retire due to the legal regulations. A majority of them would be prepared to keep on working part time and/or as volunteers.
- Although nearly all of the interviewed individuals find that they are absolutely skilled to cope with the problems of their future; nearly 2/3rds of them think that there should be more information and assistance with regards to planning one’s future.
- 72% of the interviewees think that they will not receive sufficient pension in order to be able to make a living out of it
- Only 20% have a deliberate working life exit strategy.
- Approximately 50% of the interviewed individuals think that employers value their experience..
- Only 1/3rd of the interviewees are looking forward to pension, approx. 25% of them are afraid of pension and after all 16% of them think that they will never be able to retire at all.
- 68% of the interviewed individuals find that employers do not provide flexible working arrangements for older employees.
- After all 68% of those interviewed would keep on working after having reached their legal pension age if the job offer would be interesting, another 12% of them because of economical distress.
- Nearly 50% of the interviewees are active as volunteers, another 25% could imagine to be so when retired.
- Half of those interviewed think that older workers are not valued in society.



3.2.3 Results of the Interviews with Companies about the Working Conditions of the 50+

For enterprises were interviewed, among these 3 from the private sector and 1 from the public sector. The enterprises have 8 – 15 permanent employees and up to 250 independent employees. None of the enterprises had employees older than 55 years of age.

One of the enterprises declares, that it supports its employee during the process of retirement by means of a company in-house savings system. Another company offers flexible work time arrangements.

None of the companies attempts any specific effort in order to employ or retain older employees. Nor do any of the enterprises support or initiate any volunteer activities.

Three of the enterprises indicate that, from their point of view, the specific entry barriers for older individuals consist in the following:

- Do not want to work during the weekend or in shift-work
- Are less flexible
- Do not fit into the team

As “pro” argument in favour of older employees the entrepreneurs mention that older employees have very distinct social skills and excellent formal skills.

The interviewing of the enterprises continues. The results up to this point can only reflect a trend in the enterprises, concerning the employment of older employees..

3.2.4 IWAK⁵

In the course of the evaluation of the project “Chance 50+”, the Institute for Economy, Labour and Culture - IWAK in Frankfurt/Main has accomplished a representative telephone based investigation among 500 enterprises. Aim of the investigation was to activate the motivation among the companies to employ older workers and also to sensitise them for the specific topic employment of older workers. In addition, IWAK wanted to find out specifics of the operational recruiting behaviour in regard to older employees as well as to the perception of this target group by the companies.

Awareness Level and Sensitisation

During the first year of the project the enterprises were increasingly and personally contacted by the respective ARGE staff and they were informed by newspaper, radio and TV spots and articles. As an outcome of the study IWAK discovered that the project awareness has remarkably risen during this period, and that the sensitisation for the specific situation of older workers has increased. This increase was above all remarkable in the sector of manufacturing industry and building industry, both sectors having a mentionable quota of unskilled workers. Another mentionable increase of awareness was to noted in the small trade branch. In these sectors the chances for unskilled workers being hired are above average. It can be assumed that the enterprises of these branches were contacted by the ARGE placement officers prior to others.

Instruments of Dissemination

⁵ „Attitude of Enterprises Towards Elderly Workforce – 3.Wave“, Wagner, Schmid, Frankfurt, 2007



The majority of the companies that know the project have gotten to know it because of their personal contacts to the ARGE placement officers. Besides that, the most efficient means of dissemination were reports in the daily press and the newsletters and other information of the Chamber of Industry and Commerce and the Chamber of Trade.

Attitude Change of the Enterprises

The study states that after a longer period of constant reminding a mentionable attitude change can be noticed, as regards to the employment behaviour of the companies. However, this behavioural change can be primarily noticed on the verbal and on the employment level. 14% of the enterprises state that they have changed their attitude against older workers, 11% state that they are trying to keep older workers in the company and 6% state, that they are reconsidering their position towards older workers.. In 7% of the enterprises the aspects of employing and retaining elder employees are considered and they deliberate on the question, to increase the integration of the 50+ workforce into in-house vocational training. The study does not produced accurate figures or percentages about the 50+ who are really employed.

Essential Attributes of the 50+ from the Employers Point of View.

21% of the enterprises that were interviewed by IWAK quite simply cannot imagine employing 50+ workers. Especially these companies were interviewed about the skills they feel that older workers should have in order to facilitate their employment.

72% of the interviewed individuals expressed that older employees should have the necessary skills and qualifications. Nearly as important is that they have the necessary soft skills as well as personal and social qualifications. The companies that do not hire older employees, as of yet, presume that they do not have these qualifications (62%). The enterprises put high emphasis on the flexibility of the older employees (53%), and on their ability to cope with physical stress (45%). 36% of the companies have advanced the opinion that the 50+ workforce is not efficient enough, 30% of them think that the older workers are not longer willing to qualify themselves. The salary requirements are of minor importance.

Result

The authors of the study come to the conclusion, that attitude and behavioural changes of the enterprises can only be effectuated by long term, steady information campaigns and positive examples of successfully integrated older workforce.

3.2.5 Fraunhofer Institute for Human Ressources Management and Organisation (IAO) Report of Evaluations Results of: Chance 50+ - Performance Counts, April through May 2007, inquiry period: 16.04.2007

The report of the Fraunhofer Institute mainly refers to the interior relation among the sub projects of Chance 50+. The report reveals that:

- ...after initial difficulties in terms to reach the target group the problem appears to be solved and the sustainability of the sub-projects is ensured
- ...the sub-projects contribute considerably to the activation of an older workforce.
- ...the important interface between the long term unemployed and the economy is managed very efficiently and well.



3.2.6. Consideration of the results of the federal evaluation of 62 BMAS funded employment pacts with regards to the first programme phase 50+⁶

The society for social consultancy GmbH – gsub, examines the evaluation of the employment pact 50+ in a more profound way. After a two-year term of implementation, 62 projects were examined. During this period, the projects had been evaluated on national level with the intention to identify methods of resolution, methodologies and strategies of activation and impartation of knowledge that can help to improve and facilitate the employability of older unemployed people.

In addition, the study examined in what way composition, integration and cooperation of regional actors of labour market policy have had an impact on the implementation of the employment pacts. The results of the evaluation give important hints and suggestions for the further work in the regional projects. At present state the employment pacts give a positive review of their activities. Round about 73,800 older long-term unemployed were activated, of these some 17,645 have been integrated into the common labour market (July 2007). In order to secure and stabilise the positive results of the employment pacts it is intended, to continue the federal programme *Perspective 50plus* for three more years.

Structure of participants and characteristics of successful integration

The target group of the federal programme *Perspective 50plus* are long term unemployed above 50 years of age. The average age of the participants is round about 54 years of age, only 5% of the participants are older than 59 years of age. All in all, it is 41% women and 59% men.

At the reporting date of the data collection (August 31st 2006) about 11% of the participants had been successfully integrated into the first labour market. The reintegration implicated a change of occupation in roughly 60% of the cases – which indicates an extraordinary flexibility on behalf of the participants. About 60% of the integrated individuals could be placed into jobs on a level which matches with their former occupation, 20% could even be placed in higher standards.

Some of the employment pacts geared placement efforts towards their respective “trend-industries”. This did not lead to the desired results. In contrast, the employment pacts that focused on the placement of older long term unemployed were far more successful when placing emphasis on a broad mix of industries and on small and medium sized enterprises (SME).

Promotional Offers for Participants

A lot of participants had multiple placement handicaps. Because of that, only about 20% of the target group members were able to be placed immediately. Many of the rest had to be “restored” and made fit for needs of the first labour market by means of integrated measures before trying to place them. Accompanying health care measures were of major importance in this context. In order to be most efficient, a low trainee to trainer ratio is another important precondition to success – i.e. 20 or less participants per trainer.

When entering the programme, nearly 70% of the participants had been out of a job for more than two years, 34% of them even more than 4 years. Above all, the efforts that aim to stabilise and increase the employability of the participants, in consideration of the respective period of individual unemployment, have been the most effective measures of activation.

⁶ Perspective 50plus - Newsletter Nr 10, gsub – Society for social consultancy GmbH



Among these, the continuous multi level activation approaches were the most successful, such as elements of health care and consultancy, for example. It proved to be very beneficial to split up the measures into individual and group phases and to implement empowerment approaches, in order to strengthen the individual self-help capacities and to promote job oriented as well as social stabilising network formation among the participants(...)

The most common placement handicap, in general, was the lack of transportation. A mentionable percentage of the participants either did not (or no longer) have a drivers licence or they did not own a car due to their general need for support. Others had mental mobility barriers such as lacking knowledge of public or alternative transportation possibilities. Each of the employment pacts has developed specific and very creative measures in order to eliminate the respective mobility restraints.

On federal level 25% of the participants have a emigrational background, single pacts communicate a percentage of up to 50% in all. Because of that it has been necessary and very successful to offer specific practice and workplace oriented, language courses in order to smooth out existing language problems and deficiencies. The administrative district of Offenbach, for example, has employed case managers that come from the respective target group and have an emigrational background themselves.

The degree of health related handicaps was surprisingly high among the participants as a whole. Some 35% of all individuals had health problems relevant to employment, 11% of the participants had severe health problems when coming to the employment pact. Because of that, the pacts have developed specific consultancy and healthcare offers concerning the health sector, in order to support a more healthy lifestyle and to improve the individual quality of life as well as to maintain and increase the employability of the respective participants.

Enterprise Targeting and Promotional Offers for Employers. New ways of enterprise targeting as well as of sensitisation for the topic "integration and employment of older workforce" have been a focal point of the federal programme *Perspective 50+* as well as of the federal evaluation. The target group of an older workforce that is receiving SGB II related benefits was activated by means of the federal programme. Furthermore,, the target group "employers" (first of all SME) was activated in a very specific and effective way. The crucial factor of success was to continuously develop and maintain personal employer contacts with personal contact people active in the respective companies. Interviews with regard to staff requirement and employment potentials are important supplemental elements for targeting a widespread enterprise and a basis for specific placement and qualification measures that fit to the needs of the market. The enterprises themselves demanded that the employment pacts offer employers promotional offers and a suitable selection of employees, subsidies (employment subsidies as fixed amount), options to offer workplace related additional qualification and aftercare measures for employees. The employers have appreciated the fast, service oriented, unbureaucratic and flexible approach of all actors of the federal programme. Some pacts succeeded in winning enterprises as disseminators.

Concerning the placement business, optimised placement approaches that neutralise the dualism of applicant and job oriented placement service have proven to be of fundamental importance. They include elements of qualification (optional), profiling, coaching and precisely tailored personnel-selection processes (matching). Here as well a low trainee/trainer ratio is a crucial factor for to success. It is necessary, that the placement officers know the respective employees as well as the enterprises very well. Particularly in the SME there are many possibilities to develop a specific work planning together with the employers and to develop individual profiles of qualification.



Transferability and Added Value of the Federal Programme

Nearly all of the pact concepts can be transferred to other target groups as well as to other regions. But it is evident that transferability and success of the respective concepts depend on the individuals in charge, their dedication and the quality of their personal contacts.

Regional networks conduce to the implementation of innovative job market programmes such as *Perspective 50plus*. In addition to the “classic” job market service providers, as well the chambers, societies, associations, and the business development; the local politicians are very often well integrated into these networks. As to the implementation level, pact combinations among basic welfare corporations have been exceedingly successful. All of these were positive examples for the possibilities to enlarge the close regional limits of local job markets. In the second promotion period as from 2008 the implementation of the employment pacts as combined units will be an essential element of the programme. As to the regional agencies and employers, the basic welfare corporations and social welfare services have established themselves as job market relevant actors in the framework of the federal programme and have so become far better known institutions in the entire region. The respective pacts use the liberties of *Perspective 50plus* as a field of learning, testing and experimentation.

During the upcoming second promotion period it will now be essential, to steady and stabilise the proven and successful approaches and to extend their local impact to the entire region.

3.2.7 Demographic Consultancy for Companies

In Germany demographic consultancy for companies is a fast growing field of work. Above all banks, health insurance companies and local authorities are engaged in the phenomenon of the demographic change on a professional level for some years already

The AOK Hesse has compiled information in a position paper with assumptions about ageing and future challenges for enterprises and deduced “Fields of Action for Operational Demographic Consultancy”.⁷

3.2.8 Adapting the Matrix into a Planning Instrument, Results

The foundation matrix developed in the project “Cities of Entrepreneurs” was revised for the target group 50+ according to the issues raised by the project MePlan50+ and deployed as an instrument of analysis and planning. A primary test run was carried out in Hessen and Bavaria, Germany. The results of this survey, encompassing 54 people are as follows:

⁷ Paper „Operational Demographic Consultancy“ of the AOK Hessia, Homberg, FfM 2007

THEMES	Statement	Men	women	migrants and ethnic minorities	People with disabilities	AVERAGE SCORE
CULTURE	There is sufficient help and assistance available to enable you to plan for the future?	2,32	2,38	2,39	#DIV/0!	2,36
	Society values those over 50	1,83	2,22	2,26	#DIV/0!	2,11
	Society values volunteers	2,39	2,69	2,44	#DIV/0!	2,51
	There are regular events targeted at the over 50's	1,91	2,53	2,20	#DIV/0!	2,21
	There are role models and case studies appearing regularly in the media.	2,14	2,63	2,46	#DIV/0!	2,41
	There are support mechanisms for the over 50s	2,07	2,37	2,20	#DIV/0!	2,21
		1,87	2,17	2,04	#DIV/0!	2,02
	There Are alternative life-models for over 50th and they are valued					
	Score for culture	2,08	2,43	2,28	#DIV/0!	2,26
	EMPLOYMENT	There is encouragement for the over 50s to keep working	1,37	2,37	2,16	#DIV/0!
There is encouragement for the over 60s to keep working		1,06	1,42	1,36	#DIV/0!	1,28
		1,88	2,47	1,88	#DIV/0!	2,07
There is easy accessible support to help individuals into employment						
Employers encourage applications from the over 50s		1,40	2,04	1,81	#DIV/0!	1,75
There is general awareness of job vacancies for the over 50s		2,54	2,32	2,41	#DIV/0!	2,43
There is support for developing CVs and help with the application process		3,10	3,17	3,13	#DIV/0!	3,13
There is support for career planning for the over 50s		2,32	2,64	2,40	#DIV/0!	2,46
Most employers provide flexible working arrangements		1,58	2,00	2,14	#DIV/0!	1,90
Part time work is readily available		2,76	1,93	2,73	#DIV/0!	2,47
The tax, benefit and pension rules are easily understood	1,50	1,83	1,73	#DIV/0!	1,69	
score for employment	1,95	2,22	2,17	#DIV/0!	2,12	
SELF EMPLOYMENT	There is specialised support for the over 50s to start up in business	2,24	2,26	1,71	#DIV/0!	2,07
	There are networks which are open to all entrepreneurs	2,40	2,06	1,70	#DIV/0!	2,05

	grants are available to cover start-up costs (running costs, advice, test trading...)	2,30	2,38	1,69	#DIV/0!	2,12
	score for Self-employment	2,31	2,23	1,70	#DIV/0!	2,08
VOLUNTEERING	Mechanisms are in place to support volunteering	2,47	2,22	2,33	#DIV/0!	2,34
	Benefit rules are easily understood	2,17	2,28	1,96	#DIV/0!	2,14
	score for volunteering	2,32	2,25	2,14	#DIV/0!	2,24
SKILLS	I have the skills I need for the future	3,31	3,22	2,59	#DIV/0!	3,04
	I have adequate IT skills to access the internet and for emails	3,38	3,06	2,58	#DIV/0!	3,00
	I have adequate IT skills for word processing and spreadsheets	3,44	2,68	2,54	#DIV/0!	2,88
	There is sufficient training available for me to access to develop my skills	2,35	2,07	2,00	#DIV/0!	2,14
	Score for skills	3,12	2,76	2,43	#DIV/0!	2,77
FINANCE	Mechanisms are in place for finding out the real financial needs of the over 50s	2,58	2,22	2,30	#DIV/0!	2,37
	Most people over 50 will have sufficient pension provision	1,43	1,31	1,33	#DIV/0!	1,36
	score for finance	2,00	1,77	1,81	#DIV/0!	1,86
	Overall average	2,30	2,27	2,09	#DIV/0!	2,22

The matrix shows the mean value of each evaluation given by those participating in the survey. The score of 4 was given when the participant agreed completely with a statement such as “there is sufficient support and suitable opportunities to plan ones own future”. The score of 3 was given when the participant agreed more or less, 2 when the participant did not really agree and 1 when the participant did not agree with the statement at all. The mean values of all the participants established are displayed in green (in all, the participants are more or less satisfied), yellow (there are some requirements, look more closely, the participants are not really satisfied), or red (Attention! There is a high degree of dissatisfaction among the participants). In this way, it can be seen at a glance where something needs to be done urgently.

For Offenbach, it is shown here that those over 50 do not feel highly esteemed, the men seem to suffer from this more than the women and that that there is a relative lack of age appropriate opportunities and alternatives for the unemployed over 50.

The entire area of employment opportunities and support for those over 50 to take up employment is seen as critical. The only point with a positive feedback was the support given in the compilation of application documents.

With regard to the business start-up support and self-employment, although the participants see the need for further support, they also admit that a number of measures have already been undertaken here. The participants see a greater need for support in the foundation of new businesses for migrants.



With regards to the individual skills and knowledge required to regain access to the job market, the participants judge their skills to a large extent as being quite good, only the migrants see here a greater need for additional skills. All the groups find, however, that the further education opportunities are relatively poor.

All the participants view their future financial prospects as very bad.

In all, the table shows that there are still large gaps in the support of those unemployed over 50 in Offenbach.

The results were for the most part in accordance with the results of other studies mentioned in this report.

3.3 Summary of the Results

The research so far has concluded that there many approaches to the support of those over 50 who are trying to make headway on the job market or who are trying to regain access. There must, however, be a clear distinction made between the groups taking part in each of the measures.

The fundamental differences are:

- In the duration of the unemployment
- In the educational and training levels
- In the age. With "50+", in the majority of projects ALL those over 50 are counted together although for a 55 year old, the requirements and needs are completely different to those of a 65 year old.

Generally, there seems to be a wide range of reservations about older persons on the whole. As a result, one of the most important measures needs to be the carrying out of an awareness campaign on the intricacy of strengths and weaknesses of old persons, thus gradually altering the public image of this target group.

Also for older persons, there should be more information and support mechanisms made available on the opportunities of employment for older persons.

Companies should be informed on the possibilities of special regulations for older employees.

PART 2

4 Local action planning for Offenbach/ Main

In Offenbach, a local action plan was developed in coordination with the partners involved in MePlan50+ and with other, strategic partners that participate in sub-projects for the promotion of 50+. Now, as the next step, this plan needs to be discussed among all participants and other actors involved, and then has to be precisely attuned in relation to the other sub-projects. Some of the sub-projects mentioned here have already been implemented, others are still at planning stage or have yet been applied for at various investors. And some are still in the “think-tank status”, that means that the form of implementation as well as the financing still needs to be defined.

4.1 Possible Approaches

As described under point 3.3, the following approaches could be tried:

- Information campaigns in companies on the possibilities of adequate work-place planning for older employees
- General education and awareness campaign on the strengths and skills of the older workforce
- Provision of contact points for those planning to leave employment to go into a “pensioner’s existence”
- Supporting age diversity in companies by undertaking certain measures in combination with one another: flexible working regulations, health precautions, further education measures, ergonomics, compatibility between working and private life
- Development of integrated and comprehensive personal politics with regards to attractive age management

The study by the organization “gesub” on the employment pacts carried out on a federal level gives the following recommendations:

- Good public relations is vital to positively embed the employment programmes with employers
- The intersection between “economy” and “unemployed” needs to be well managed
- Continuous activation approaches are valuable, including, among others, elements of health care and counselling.
- Individual and group phases as well as empowerment approaches strengthen the self-help skills and network building of the participants
- Mental and spatial mobility barriers need to be removed with the help of special measures
- With participants having a migrant background, practise- and work-oriented, specific language courses and training, as well as the implementation of case managers with migration backgrounds from the target group have proved effective
- To maintain and increase the employment capabilities as well as to improve individual quality of life, a special advisory and supervisory service in the health area is necessary with a large proportion of the participants



- The setting up of personal and continual contacts via a permanent contact person to as many employers as possible guarantees the best-suited placement as well as demand-oriented qualification measures
- Also the financial subsidies, the possibility of workplace-related post qualification and supervision of employers as well as the service-oriented, un-bureaucratic and flexible approach by the parties involved encourages close cooperation with the employers
- Optimized placement approaches include qualifying (optional), profiling and coaching elements and exact personnel selection processes (matching)
- So that the placement staff can get to know the applicants as well as the companies and their job offers, low mentoring ratios play a prominent role
- Principally, nearly all the pact concepts are transferable onto other target groups as well as other regions as long as the persons involved are committed and can bring in good personal contacts
- Regional networks help in the expansion of the narrow spatial layout of communal job markets

4.2 Possible actions

The possible activities for Offenbach, as the partners have discussed them up to date are displayed in the following table. The project name, the project partners playing an active role, the period of operative implementation, the actual status of project realisation and a short project description are situated on the y-axis. The respective projects are situated on the x-axis.

Nr.	Project Name	Operational Partners	Financing	Period	Status	Short Description
1	Single Profiling	GOAB, MainArbeit	BMAS	01.01.2008 - 31.12.2009	submitted, continuation of pilot project	1:1 placement, d concept
2	Group Profiling	GOAB, MainArbeit	BMAS	01.01.2008 - 31.12.2010	submitted, continuation of pilot project	4 week full time s search for job off
3	Job club	GOAB, MainArbeit	BMAS	01.01.2008 - 31.12.2011	submitted, continuation of pilot project	Room and comp order to improve advanced vocati
4	FirmenWerk (Firms Works)	MainArbeit, KIZ	BMAS	01.01.2008 - 31.12.2012	submitted, continuation of pilot project	If unemployed 50 cannot stand on FirmenWerk with self supporting a
5	FirmenWerk (Firms Works) module "Triple A"	MainArbeit, KIZ	BMAS and MePlan50+	1.10.2007 - 31.9.2008	In implementation	During their trans participants are t under the roof of self employment developed for the
6	Bewegung + Gesundheit (Movement and Health)	MainArbeit, Uni Frankfurt	BMAS	01.01.2008 - 31.12.2014	submitted, continuation of pilot project	Unemployed tha reactivated and r
7	Ongoing attendance of integration processes FIB	GOAB, MainArbeit, KIZ	BMAS	01.01.2008 - 31.12.2015	submitted	During a 4 week unemployed are documents and i
8	"Startrampe" (Launch Pad)	KIZ, MainArbeit	BMAS	01.01.2008 - 31.12.2016	submitted	During a 4 week unemployed are documents and i
9	Dialogue Breakfast	GOAB, IHK, MainArbeit	BMAS	01.01.2008 - 31.12.2016	submitted, continuation of pilot project	Entrepreneurs a breakfast, where qualification, hea reemployment of set up networks
10	Culture coaching	GOAB, IHK	BMAS	01.01.2008 - 31.12.2017	submitted, continuation of pilot project	Unemployed 50- counsellors of th job, and are prov Empowerment a



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Article 6 Innovative Measures



11	Zukunftswerkstatt (Innovative future workshop)	KIZ, Agentur für Arbeit	Agentur für Arbeit, MePlan50+	01.01.2008 - 30.09.2008	in preparation, certification still outstanding, submitted	During a 3 phase personal future a of implementatio training
12	Ageing is not the problem	Forum Offenbach	Own resources	ongoing	ongoing	Sensitisation, lec
13	Company-handover exchange	IHK	IHK	ongoing	ongoing	Individuals intere platform of enter interested parties
14	Aufwind (Updraft)	KIZ, MainArbeit	BMAS	01.01.2008 - 31.12.2017	submitted	High potential un hindrances deve are accompanied



4.2.1 Continuation of proven, good approaches

As already described, for some years already in Offenbach there is a number of ongoing projects, that target to the integration of unemployed 50+ into the job market. However, the actual project financing by the Federal Government is running out. A new framework of project financing is actually being applied. This gives reason to evaluate the previous projects and to reposition them. Some of the previous projects will be discontinued, but others will be adapted or simply be integrated into the main stream in exactly the same course of action as they were implemented before.

Of the projects mentioned in the above table, the following have proven themselves and will now be continued, some of them, however, slightly modified:

Single Profiling, implemented by GOAB, MainArbeit

Group Profiling, implemented by GOAB, MainArbeit

Job Club, implemented by GOAB, MainArbeit

FirmenWerk (Firms Works) , implemented by MainArbeit, KIZ

Bewegung + Gesundheit (Movement and Health) MainArbeit, Uni Frankfurt

Dialogue Breakfast, implemented by GOAB, IHK, MainArbeit

Culture coaching, implemented by GOAB, IHK

Ageing is not the problem, implemented by Forum Offenbach

Company-handover exchange, implemented by IHK

4.2.2 New approaches

The following projects are entirely new:

FirmenWerk (Firms Works) Modul "Triple A" implemented by MainArbeit, KIZ

Ongoing attendance of integration processes FIB implemented by GOAB, MainArbeit, KIZ

"Startrampe" (Launch Pad) implemented by KIZ, MainArbeit

Zukunftswerkstatt (Innovative future workshop) implemented by KIZ, Agentur für Arbeit

Aufwind (Updraft) implemented by KIZ, MainArbeit

The project FirmenWerk, module „Triple A2“ is yet being implemented since October 2007. It was developed during the previous months due to emerging actual demands.



As well due to evident actual needs, not only in Offenbach but virtually in all cities that cope with the integration of migrants into the job market, a project that provides native speaker contact-persons for long term unemployed with migrational background was developed. This project, „Startrampe“ (launchpad), is a follow-up project of the previous project 512, however it addresses high-potential unemployed. They shall be embedded into a very close knit process, in order to reintegrate them into the job market yet faster.

The Project „Zukunftswerkstatt“ (Future Workshop) is an entirely new development as well. Particularly based upon the experiences of the partners in Wales and Ireland, the project MePlan has evaluated, that a more integrated consultancy that not only regards the actual working situation, but as well the general life planning, makes sense and is capable to open entirely new perspectives, particularly for older unemployed. The targeted project partner for this, the „Agentur für Arbeit“ (Employment Office), would be completely new in conjunction with the MePlan project. Because of various surrounding conditions it had so far not been possible, to implement joint projects with the „Agentur für Arbeit“. As a precondition, KIZ as the implementing partner at first needed to get certified. This was realised in summer 2006, the certification is valid since November 2007, so that new, long-planned projects such as the „Zukunftswerkstatt“ (Future Workshop) can now finally be implemented.

The sub-project „Aufwind“ (Updraft) is new as well, and is similar to the project „Zukunftswerkstatt“ (Future Workshop). Its target group though is different, it addresses ALG II beneficiaries, individuals with certain, major placement obstacles.

4.3 Possible partners

The majority of the partners that were integrated, had already been cooperating successfully in former collaborations, although some were all new partners. The list of actors in Offenbach is rather easy to grasp, they are all acquainted with each other. Because of that, no unpleasant surprises are due to occur. All partners that had been integrated into former projects are tightly networked and also proven and tested in collaboration, because of that no specific problems are to be expected.