



ADJUSTING WORKING CONDITIONS FOR DIFFERENT LIFE STAGES AT ERSTE BANK ÖSTERREICH, AUSTRIA

1. Organisations involved

Erste Bank der österreichischen Sparkassen AG

2. Description of the case

2.1. Introduction

The Erste Bank, together with the Sparkassen, comprises one of the largest banking groups in Austria. They are classical universal banks with a traditional focus on retail customers, small and medium-sized enterprises (SMEs) and asset management. Throughout Austria they serve more than 3.2 million clients, employ more than 14,000 people and operate in over 1,000 branches. The wellbeing of employees has a high priority within the company, the goal being to enable them to remain motivated and work contentedly until retirement.

2.2. Aims

The LIFETIME project was developed to promote the productivity of the workforce throughout all stages of their employment. The aim is to create age-appropriate working conditions, so as to support long-term job satisfaction and motivation. A better balance between personal and professional commitments and interests should be achieved, and the measures should have a positive impact on wellbeing at work.

The following objectives were pursued regarding wellbeing and a positive work environment during the project:

- **Young employees:** LIFETIME is not "management for older workers", but a generational programme for sustainable growth. The Erste Bank AG will remain an attractive employer for young employees with prospects.
- **Training:** Employees of all generations will be given space for personal development; different learning needs are taken into consideration. The awareness of the need for life-long learning is encouraged.
- **Corporate Culture:** Appreciation and individual promotion of each employee.
- **Health:** The health and fitness of employees are promoted to support wellbeing and thereby prevent absenteeism.

2.3. What was done, and how?

First period (consultation and planning): November 2004 – September 2005

The LIFETIME project was commissioned by the Executive Board. It was promoted by the Works Council, the Executive Board and an external consultant, who supported the project significantly in the preliminary analysis. The workforce was surveyed regarding corporate culture by an external consultancy. Focus groups were set up, separated by age groups, gender, and managers/employees.

Different working groups were established. All in all, 30 employees worked in six working groups on the topics of health, corporate and management culture, education, young people and sales. The

composition of the working groups was reported back on very positively. All age groups, both genders and different levels of the hierarchy were represented, which had a particularly positive effect on creativity and performance. Only in the group "young employees" the older age group was not represented.

The results of the working groups were passed to the following departments for implementation:

- Human Resources
- Sales
- Marketing
- Corporate Communications
- s-Academy (the 's' stands for the first letter of the word 'Sparkasse') and
- sObject Management (sOM).

Second period (development and implementation of measures): October 2005 – December 2006

The measures decided upon in the first period of the project were worked out in detail and implemented. For the roll-out phase an Advisory Board was set up consisting of members of the Executive Board, the Works Council, division managers, and project staff.

The LIFETIME programme includes the following actions:

Young employees

Young employees were supported through the initiation of groups to share their new experiences at work. Furthermore, a **mentoring programme** was developed for a structured exchange of knowledge and experiences between young and older employees as well as managers.

Training

An analysis showed that the **further training** of older workers had been neglected. Therefore, a new training programme designed to, amongst other things, increase motivation, strengthen the personality and cope with stress was specially developed for middle aged and older employees. Older employees were also found to have a significant deficit regarding computer literacy. Therefore, a range of seminars on computing skills for different age groups were offered.

Because of the pension reform in 2004, older workers were confronted with the prospect of working five years longer than initially planned. Thus, seminars were developed to motivate employees who would retire in three to five years:

- Motivational seminars for employees affected by the pension reform, to help maintain performance and effect the timely planning for the transfer of knowledge and experience took place.
- Personality seminars for personal development during the last working years and the transition to retirement were organised.

In the **s-Academie** existing training programmes and further education in relation to age-appropriate learning were reviewed and adapted.

Corporate culture and leadership

Leadership training: Managers must acquire specialised knowledge for the optimal development of employees in their respective life stages.

Knowledge management: The company will lose important knowledge in the case of a retirement, if a timely and structured procedure does not ensure that explicit and implicit knowledge is passed on. The sustainable protection of this knowledge has a very high priority for the company's performance. Professional knowledge management was therefore introduced.

New career paths: New professional career opportunities were created to help promote employees throughout their working life. For example, a new project for the implementation of a new career path was launched. At the same time the Group Competency Model was introduced according to the model of the consultancy Towers Perrin. Following this model, all business functions were divided into five job-families, and described in five stages, for professional, personal and social skills.

Working time model: The implementation of concepts such as working time on trust, individual working time, switching from full to part-time and vice versa, and the possibility for a sabbatical, allows all employees to achieve a better work-life balance. Furthermore, a working time model with two variants was developed, which allows older employees to reduce their working time. The reduction of working time in the last few years of work creates a sliding transition from professional life to retirement, whilst the block model allows an earlier work-free period prior to retirement age.

Health management

Health management was reorganised based on the WHO criteria of health promotion (Ottawa Charta 1986¹) and should lead to the physical, mental and social wellbeing of all employees.

In the **Work-Health-Centre**, preventive medical examinations, ergonomic workplace design, physical treatment and psychological counselling are offered. Furthermore, health promotion projects are provided (stress management, burnout prevention, etc.), which address specific groups such as apprentices in order to promote a healthy way of life. Thus, employees should be empowered to deal better with stress in the workplace. Additional support for employees and managers dealing with workplace stress or acute crises is offered by psychologists.

In the **Work-Life-Centre**, the compatibility of work and family life, especially in difficult situations is supported. Furthermore, different relaxation techniques are offered, and employees learn about sports and work-life balance for the prevention of burnout.

The **sOM (sObject Management)** checked the age appropriate design of the workplaces.

2.4. What was achieved?

The results were evaluated by the Human Resource Management and Recruiting Department in 2011:

Young employees

Every year young employees were able to share their new experiences at work in six meetings with approximately 15 participants. These meetings were perceived by participants to be considerably supportive.

Training

In 85 seminars 707 middle aged and older employees participated in training programmes, which increased their motivation, strengthened their personality or enabled them to learn more about coping with stress. The feedback has been very positive. 275 older employees improved their computer skills (Word, Excel and PowerPoint) in 38 seminars.

¹ <http://www.euro.who.int/en/who-we-are/policy-documents/ottawa-charter-for-health-promotion,-1986>

72 older workers, who were confronted with the prospect of working five years longer than expected, because of the pension reform in 2004, participated in seven motivational and personality seminars. Mostly very positive feedback was reported.

s-Academy: The teaching methods for further training were adjusted to the different age-appropriate learning needs. In addition, the design of seminars and workshop content were reviewed and the feedback from participants was analysed.

Corporate culture and leadership

Leadership training: For a better understanding of the optimal development of employees, mandatory workshops for all managers on generational equitable leadership were organised. 285 managers in 22 workshops participated. To ensure a generational equitable leadership, the tools “appraisal interview” and “upward feedback” were adapted.

Mentoring programmes for the efficient transfer of knowledge were established. So far, 16 mentors and 16 mentees have completed the programme successfully.

Knowledge management: New measures for a structured protection of knowledge in the case of an impending retirement of specialists are tested. The results will be evaluated and presented to the board for decision. The folders in the computer system were reorganised to allow faster access, and to ensure access to modern technologies.

New career paths: Approximately 350 new job descriptions were drawn-up to create more professional career opportunities.

Working time model: 96 older employees have taken advantage of the new working time model.

Health management

Work-Health-Centre

- Approximately 1,500 employees went to the annual check-up – expanded by special offers (e.g. blood pressure campaign, spinal screening).
- Approximately 650 participants (2008) went to a melanoma screening (2-year-interval).
- Seasonal vaccines (influenza and encephalitis) and current immunisations were offered.
- Approximately 1,250 participants (2008) went to eye tests for video display unit workers.
- Checking of new office furnishings together with SOM.
- Individual health counseling, e.g. vaccinations for business trips.
- Approximately 700 psychological consultations were requested.
- Approximately 11,000 consultations at the health centre took place.
- Approximately 260 participants were at the ‘veins action week’ for employees with a sitting and/or standing task.
- The number of burnouts was reduced through specific preventions (e.g. psychological counseling, financial support for psychotherapy).
- The guide ‘Leadership to health’ published.

Work-Life-Centre

Advice in difficult personal situations, in cooperation with an external consultant, is offered to all employees, optimised in half-yearly contacts and exchanges. Therefore, statistics of usage are prepared every six months.

Lectures by experts on the topics "exercise" and "work-life balance" were organised. Around 900 employees attended nine different lectures. Furthermore, various relaxation techniques which possibly contribute to an effective relief for the predominantly sedentary work as well as to the reduction of mental stress are offered. 350 employees participated in these relaxation trainings.

sOM (sObject Management)

Age appropriate adjustment of furniture and lighting, as well as the installation of a more easily legible guidance system took place.

2.5. Success factors

- Participation orientation – more than 100 employees (many of them managers) were involved in the creation and analysis of the LIFETIME project during a year
- Awareness is raised amongst managers
- Measures address the wellbeing and development of all employees
- Analysis of the current situation leads to targeted actions.

2.6. Further information

Doris Felix

HR Development

Erste Bank der österreichischen Sparkassen AG

Graben 21

A - 01010 Wien

Phone: +43 50100 – 13220

E-mail: Doris.felix@erstebank.at

Website: <http://www.erstebank.at>

2.7. Transferability

The systematic and comprehensive approach of the LIFETIME project appears to be transferable, particularly to medium-sized and large enterprises, in different sectors. The measures have been assessed very positively. Typical stereotypes affecting younger and older employees were critically questioned. It can be observed that attitudes towards older employees and the better use of their strengths, has improved significantly. For many people, measures introduced through the LIFETIME project are now – five years later – quite natural, and have led to a positive working environment.

3. References, resources:

<http://www.erstebank.at>

<http://www.euro.who.int/en/who-we-are/policy-documents/ottawa-charter-for-health-promotion,-1986>