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# ILPO55 NATIONAL REPORT

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**Country:**

**ROMANIA**

**Institutions related:**

**ANUP-International**

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## 1. INTRODUCTION

The following report aims at introducing the results of the Needs and Gaps Analysis in the field of age management and intergenerational activities in (PARTNER COUNTRY).

## 2. NATIONAL CONTEXT

### 2.1 Legislation

There is not a specific item related to age management.

**The European Foundation for the Improvement of Living and Working Conditions stated in a survey, in 2012 the following:**

“All Member States with the exception of Romania and Portugal recorded an increase in the employment rate of workers aged 55–59 while Greece, Poland, Portugal and Romania were the only countries with declining employment rates for the 60–64 age group.”

“The value of a mixed-age workforce is increasingly recognised and evident in efforts to ensure intergenerational cohesion and knowledge transfer within companies. These ‘soft’ changes are addressed in part to current company needs but are also a form of adaptation to a future where demographic ageing may result in potential labour and skills shortages and will result in an older workforce. Workplaces in Europe are adapting to these challenges and a greater share of workers are remaining healthy in work for longer.2.declining employment rates for the 60–64 age group.” 1.

### 2.2 Initiatives

**Any national program related to age management?**

The need of this topic is there, but we can not speak about a program introduced in FSS.



### 3. RESULTS FROM THE FIELD RESEARCH:

#### 3.1 Competencies Survey

A Competencies questionnaire has been implemented focusing on analysing the competencies of over 55 and under 35 with a perspective of sharing strengths between ages.

**Short introduction with methodology followed to identify/send the questionnaires to the target group:**

It was a difficult task for ANUP-International, as the financial services was not a target group till now.

We sent about 15 official letters to the biggest banks, research and training providers, insurance companies. None of them reacted positively. Then we thought to open the cooperation with the bank we had the account, and this was BCR-a small branch in Bucharest. Happily this branch was very interested and recommended another one.

Then the ASE, management department, whom the dean I know, was also very cooperative. The president of the trade union, Mr. Constantin PARASCHIV, took contact with the international relation officer from the Employer's Council who gave me some names of the personnel involved in training and human resources.

I have to say that the people working in the front office whom I contacted for the questionnaire were very positive and appreciated the idea of the project.

**Number of respondents:**

	>55	<35	35-55	Total
COUNTRY	8	13	16	37

## Main results

5 most relevant competencies that over 55 can share/offer/teach/mentor under 35

MANAGEMENT	TECHNICAL	SOCIAL	BEHAVIOURAL	ICT
Strategic planning and formulation	Quality	Assertiveness and use of positional power	Analytical thinking	Advanced excel tools
Managing internal and external relationship with key stakeholders	Technical banking skills	Participation in cooperation programs	Achievement orientation	Presentations with new PPT social tools
Performance management in terms of planning, conducting, follow up and assessment	Budgeting	Relationship building and networking	Emotional intelligence	e-learning
Financial management	Reporting	Social commitment	Stress management	smart tools
Delegation of tasks to teams and individuals	Conducting meetings	Market orientation	Time management	Communication tools: Skype, others

5 most relevant competencies that under 35 can share/offer/teach/mentor over 55

MANAGEMENT	TECHNICAL	SOCIAL	BEHAVIOURAL	ICT
Change management	Reporting	Capacity to search for information	Capacity to search for information	Communication tools: Skype, others
Implementation strategy	Customer oriented	Self control and Confidence	Self control and Confidence	smart tools
Financial management	Quality	Time management	Time management	Streaming media
Cultural diversity management	Assessing financial products	Emotional intelligence	Emotional intelligence	Social media
Implementation strategy	Project development			

As the project also included the perception/opinion of people working in FSS aged between 35 and

55 on the intergeneration competencies, the main results are:

5 most relevant competencies that under 35 can share/offer/teach/mentor over 55

MANAGEMENT	TECHNICAL	SOCIAL	BEHAVIOURAL	ICT
Delegation of tasks to teams and individuals	Market and competitor analysis	Assertiveness and use of positional power	Initiative	Streaming media
Strategic planning and formulation	Project development		Capacity to search for information	Communication tools: Skype, others
Risk identification and management	Planning		Self control and Confidence	smart tools
Environmental scanning and analysis for decision making	Strategy of implementation and formulation		Interpersonal understanding	
Change management	Reporting			

5 most relevant competencies that over 55 can share/offer/teach/mentor under 35

MANAGEMENT	TECHNICAL	SOCIAL	BEHAVIOURAL	ICT
Delegation of tasks to teams and individuals	Quality	Leading developing and managing people	Self control and Confidence	Written communication
Strategic planning and formulation	Conducting meetings	Social commitment	Interpersonal understanding	Non verbal communication
Risk identification and management	Reporting			Verbal communication
Managing internal and external relationship with key stakeholders	Key performance indicators/criteria for monitoring			
Change management	Key performance indicators/criteria for definmarket			

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The specific results of the questionnaires are annexed to this report.

The **MANAGEMENT SKILLS** are varying as importance in accordance with the working environment. All the components are working together. It is very important that they should be correlated. The correlation should be between back office and front office. This correlation determined the importance of the competences. For back office some of the skills are important, and some other for the front office. The correlation creates a necessary flow in the working process.

For the **TECHNICAL SKILLS** the discussion refers to the **skill of quality** and especially how can a <35 individual **gave guidance** to a >55.

Young employees can accumulate a lot of information, but the individuals of >55 can better manage and structure the information taking into account their working experience. So, the component of quality is not influenced by age.

The **SOCIAL SKILLS** are the most difficult to understand and to transfer for all age groups. We can not speak about an optimal transfer between generations considering their emotional aspect. The >35 individuals can better socialize out of their working time, but even in their free time they still think at their professional profile. There is no time and availability for this categories of personnel.

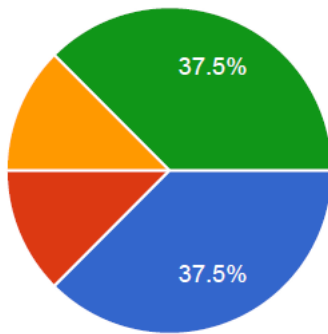
### 3.2 Intergenerational Activities

Current intergenerational activities were studied in order to identify specific approaches on age management. **Main findings on intergenerational activities have been the following:**

**Level of participation of the employees of the FSS in this kind of activities ( from the results of the survey)**

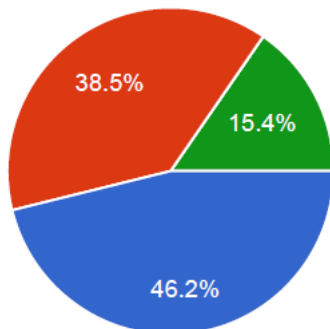


For >55



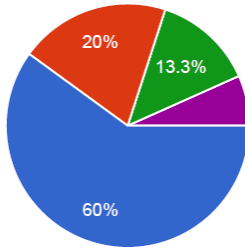
Face to face courses	3	37.5%
Courses on line	1	12.5%
Mentoring	1	12.5%
Coaching	3	37.5%
Social media activities	0	0%
External intergenerational activities ( cooperation)	0	0%
Job shadowing	0	0%
Other	0	0%

For <35



Face to face courses	6	46.2%
Courses on line	5	38.5% from the platform on line of e –learning type
Mentoring	0	0%
Coaching	2	15.4%
Social media activities	0	0%
External intergenerational activities ( cooperation)	0	0%
Job shadowing	0	0%
Other	0	0%

For 35-55



Face to face courses	9	60%
Courses on line	3	20%
Mentoring	0	0%
Coaching	1	6.7% with the employees of the branch
Social media activities	0	
External intergenerational activities ( cooperation)	0	
Job shadowing	0	
Other: course of type WIN_WIN		

- Welcome programs that include intergenerational activities
- Relevancy and usefulness of a set of intergenerational knowledge management and cooperation

The idea of the project is very generous and could help for improving the efficiency of the bank, as a private organisation doing profit, but it is compulsory to build it into the organisation from the top management and taking into account also the human aspects.

This is question of strategy and policy of the bank to build the profit in such a way that the intergenerational cooperation could be a vector of efficiency.

- Impact/benefit/motivation in sharing knowledge and experience with and elder/younger generation.

### 3.2 Focus group or Interviews

In order to ensure a better approach on intergenerational activities and gaps between over and under 55 years old in the financial services sector, the project team organised FOCUS GROUPS/INTERVIEWS to share the expertise, knowledge and interests of key stakeholders in FSS and ensure that the activities and materials to be developed and used as part of the project are **'real', relevant and useful**.

The main conclusions of the focus groups are the following: (from the report)

- The group considers that the intergenerational activities are extremely relevant and could be a useful way to exchange competencies that over 55 have acquired through working experience and, on the other, under 35 have recently learnt from their educational experience.
  - Technological abilities are considered as an opportunity to be acquired by over 55 for different purposes: online teaching or mentoring, for instance.
  - There are no relevant good practices to be shared as most of them declare that intergenerational activities have not really been implemented in their companies. Some state that over 55 are usually involved in activities such as initial training to new employees but it is not a process that is afterwards sustained during a longer period.
  - All the participants agreed on the fact that a good institutional management has to care also about the personal need of the employee in relation with the bank's objectives. Humans are not only robots focussed only on target accomplishment.
  - Regarding the *assertiveness use of positional power* the opinion of all participants is that in Romania we can not speak about a culture of management. At the question of Why?, the answer was that this is due to the former regime which put the employees to execute the orders. There was no space left to have creativity or innovation, but only to do what your boss is telling you to do. ***"There is also often a mismatch between the orders coming from to many different level managers. One say some, the other sometimes just the contrary, then you as an officer have to ask diplomatically who did tell you to do this or that, in order not to offend them"*** ( a participant said).
  - The position of social responsibility facilitator is often linked only to the marketing scope, and the corporation is gaining an image capital.
  - From the survey one can notice that the employees >55 give guidance more skills to those of <35 than vice versa. The argument is that the young are afraid of losing their jobs if they give guidance to others. They want to preserve their professional acquisitions in terms of
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### 3.3 Good practices identified

In this respect there are not so much experiences, at least at the level of front office services.

-Ms. Gruia from the ASIROM, the biggest insurance organization in Romania, is very interested in the implementation of the idea of the project, have some experience in this respect and agreed to come at the focus group, as she wants to implement it in practice.

The level of BCR-Department HR-Training sector-expressed a special interest for the approach of intergenerational Learning and will inform about this during the European Consultative Seminar of 09/07/2015.

Generally there are quoted some experiences about intergenerational cooperation like : face to face courses, coaching and very few on line courses. There are mentioned also some activities like: win win, Smart start for the beginners. No mentoring activities, no job shadowing at all.

During the Consultative seminar the management level of institutions in charge with training will report on this issue, as it is mentioned as a separate point on the agenda.

Name of the practice	Company Institution	Type of practice <i>(training, mentoring, online activities, social activities, cooperation, job shadowing, other.)</i>	Transferability	Sustainability