



Agreement on senior policy at UiO

Signed on 13 December 2007 by UiO and the civil service unions Parat, The Norwegian Civil Service Union (NTL), the Norwegian Association of Researchers and the Federation of Norwegian Professional Associations, revised on 12 June 2008.

The agreement entered into force on 1 February 2008.

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0 To whom this agreement applies

The agreement on senior policy encompasses all employees between the ages of 60 and 70 years at UiO. As a main rule, Sections 4 and 7 of the agreement do not apply to employees in temporary positions.

1 Objective

The university's HR policy confirms that UiO will

actively facilitate individualised adaptation of job duties in a manner that combines UiO's operational needs with the individual's background and skills, phase of life and overall life situation.

The senior policy shall help ensure that UiO can make use of the competence represented by the older employees. At the same time, the objective is to provide our senior employees with a meaningful job situation where they can enjoy job satisfaction, fulfilment, academic development and social integration.

2 Working environment perspectives

Research has clearly shown that in addition to health factors, the psychosocial aspects play the largest role in the senior employees' choice between taking early retirement and continuing to work. Working environment aspects and stimulation of the employee's motivation to continue to work will therefore be an important basis for individual adaptation.

The objective is to make provisions to ensure that the employee can:

- feel in control of their own working situation
- consider themselves seen and appreciated by their immediate superior
- experience their work tasks as challenging and meaningful

These criteria shall be included in the premises for choosing specific measures as well as for evaluating the effect of these measures at a later stage.

3 Management responsibilities

Achievement of UiO's goals for senior policy is part of the line management's responsibility at all levels. This entails commitment in relation to specific measures for adaptation as well as awareness-raising activities.

All managers are expected to be familiar with UiO's goals for senior policy, available instruments and mechanisms that can affect older employees' employment activity. Moreover, active steps shall be taken to convert this knowledge into systematic and targeted efforts to prevent discrimination and exclusion of seniors.

Local senior policy initiatives shall be incorporated as visible elements in planning, budgeting and reporting processes, and given weight in the follow-up and evaluation of the performance of each individual manager.

4 Individual adaptation of measures

Like everybody else, senior employees have different abilities, and the motivations of each individual to continue working and contribute with their skills and resources will therefore vary. The main principle of

UiO's senior policy shall therefore be individual adaptation of measures and space for flexible arrangements, within the framework specified by this agreement.

Individual solutions shall be adapted on the basis of a combination of UiO's needs for competencies and personnel and the individual's needs.

4.1 Senior appraisal interview

- When employees at UiO reach the age of 60, they shall have an interview about their status and further development with the manager who is responsible for the employee in question.
- The objective of the interview shall be to identify the individual senior employee's wishes and ambitions, future prospects and need for competence enhancement, and shall form the basis for planning his or her future working situation. The employee and the employer must specify their mutual expectations and clarify any needs for special adaptation that they envisage.
- As an employer, UiO shall ensure that all employees enjoy a satisfying and rewarding job situation, but seniors must also assume active responsibility in this respect. Specification of individual adaptations shall therefore be undertaken jointly between the employee in question and the employer, but the employer will make the final decision on which measures are to be implemented in each individual case.
- The results of the interview shall be documented in writing and serve as the basis for evaluation and further assessment in subsequent standard performance appraisal interviews.

4.2 Some examples of individual adaptation

- Since the basic principle is individual adaptation, the employer and the employee must independently assess what types of measures will be appropriate in each individual case. However, examples of adaptation may include:
 - A. Flexible organization of job duties, adapted to the needs of the institution combined with the particular abilities of each individual senior employee. For academic staff members, this may mean that a greater proportion of the working hours is devoted to tuition, research, dissemination, academic development, administration or other duties. For personnel in technical-administrative positions, one possibility could be an alternative career pathway, involving a transfer to a position that is better suited to the individual's abilities and where UiO can make better use of the senior's competence. In this context, reference is made to how UiO's structure of technical-administrative positions indicates possible alternatives. Reference is also made to the internal mobility arrangements specified in UiO's HR regulations.
 - B. Practical adaptation of the job situation, for example permitting the employer to perform his or her job duties in locations other than the ordinary workplace on specified days, use of a 'time account' arrangement beyond the traditional flexible hours or other adaptations. Reference is also made to Section 5 in the agreement on opportunities for reduced working hours.
 - C. Measures for adaptation of competence can be an important element with regard to adapting the seniors' job situation and satisfying the needs of the employer. A high competence level will provide for more flexibility with regard to new duties, which in turn may help enhance job satisfaction. Competence enhancement measures could include leave of absence to attend

training courses, qualification or maintenance programmes and other relevant initiatives, such as new duties, participation in projects, internal job rotation and similar.

- D. Establishing a role as a senior supervisor/mentor can be an effective use of the competence and experience that the senior employee has gained during his or her career. Moreover, such a mentoring scheme could combine recruitment considerations and senior policy by permitting overlaps in staffing and thus help ensure continuity and give new employees an easier start.
 - E. Making provisions for a partial contractual pension (AFP). The main objective for our senior policy is to maintain employment activity, however UiO must also, to the greatest degree possible, help facilitate the situation for employees who prefer a gradual transition to retirement. If they so desire, seniors over the age of 62 should therefore be provided with adapted job duties that permit transition to a reduced full-time equivalent in combination with part-time retirement (AFP).
- Individual adaptations should be documented in the form of a binding document that specifies the measures to be taken and the applicable conditions.

5 Reduced working hours

Employees who reach 60 years in the holiday year are granted an extra week's holiday, cf. [Section 5, no. 2 of the Holiday Act \(lovdata.no\) \(Norwegian\)](#). From the age of 62, employees are also granted a reduction in working hours with no cuts in pay, within the framework of Sections 5.1 and 5.2 in this agreement.

5.1 Scope of the arrangement

- In addition to the eight extra days off specified in the Basic Collective Agreement, UiO grants employees over the age of 62 four extra days off, resulting in a total of 12 extra days off with pay in each calendar year. The right to extra days off applies from the year when the employee reaches 62 years.
- The employee does not have the option to demand pay in lieu for these days off, unless exceptional circumstances so allow. Normally, the limitations applicable in this context should be as restrictive as those that apply to pay in lieu for holidays that have not been taken.
- For part-time positions, the number of extra days off is calculated in proportion to the full-time equivalent.
- Days off cannot be transferred to the next calendar year.

5.2 Models for reduced working hours

- Days off pursuant to Section 5.1. of this agreement can be taken as full days, in continuous periods or as single days. This time can also be allocated in the form of reduced daily, weekly or monthly working hours.
- Examples of models for permanently reduced working hours
- 12 days with a working week of 37.5 hours results in a reduction of 90 hours or a 5.4% reduction, calculated on the basis of 1 657.5 hours (with six weeks' holiday) per year. This reduction can be taken as, for example:
 - Slightly more than one day/eight hours per month

- 2 hours and 10 minutes per week
- 20 minutes per day
- It is assumed that the reduction in working hours will be organized in a manner that affects the ordinary activities in the workplace, including teaching, to the least extent possible.
- A model for reduced working hours shall be agreed by the employee and the employer.
- If the parties fail to reach an agreement, the employer will decide how the time shall be taken, on the basis of balanced consideration of the needs of the institution and the employee's wishes.

6 Use of wage-related instruments

Within the framework of the Basic Collective Agreement and UiO's wage policies, pay rises can be granted to senior employees outside the annual local bargaining rounds, provided that there are special reasons for doing so pursuant to [Section 2.3.4 of the Basic Collective Agreement \(lovdata.no\) \(Norwegian\)](#). The opportunity to put forward wage claims pursuant to Sections 6.1 and 6.1 of this agreement does not restrict the opportunity to put forward claims during the annual bargaining rounds pursuant to [Section 2.3.3 of the Basic Collective Agreement \(lovdata.no\) \(Norwegian\)](#).

6.1 Pay rise to retain the employee

For employees who consider taking early retirement, financial rewards may be an important incentive to continue working, at least in a part-time position. To retain employees over 62 year, claims for pay rises can be made pursuant to [Section 2.3.4 no. 2 of the Basic Collective Agreement \(lovdata.no\) \(Norwegian\)](#). Such claims shall be subject to individual assessment in dialogue with the employee, and the grounds for such a pay rise must be to retain him or her in a full-time position or smaller full-time equivalent.

6.2 Pay rise to reward extraordinary efforts

For employees aged between 62 and 70 years who wish to retire on a full pension, claims for a pay rise can be put forward on the grounds that the employee has undertaken an 'extraordinary effort', cf. [Section 2.3.4 no. 2 of the Basic Collective Agreement \(lovdata.no\) \(Norwegian\)](#).

7 Training courses for senior employees

Employees who have reached 60 years shall be invited to an internal session for seniors. The main focus of this session shall be the senior employee as a resource and UiO's objective to encourage senior employees to remain active in the workforce.

The employees should be given the opportunity to attend this course before the senior appraisal interview (see Section 4.1) in order to have the best possible basis for assessing their own opportunities for adaptation of their job situation.

Appendix: Proposal for content of a senior appraisal interview

The senior appraisal interview shall aim to identify the ambitions, prospects and competence enhancement needs of each individual senior employee and provide a basis for planning the continued working situation.

The employee and the employer shall specify their mutual expectations and clarify any perceived needs for special adaptation.

A constructive dialogue requires mutual openness and respect for the fact that the employer and the employee may have different perspectives, but where the goal is to identify solutions that combine consideration for the employee with UiO's needs.

Example of structure and content of the interview

Working environment aspects and stimulation of the staff member's motivation to continue in the job shall form the basis for individual adaptations. The objective is to make provisions to ensure that the employee can:

- feel in control of their own working situation
- consider themselves seen and appreciated by their immediate superior
- work tasks as challenging and meaningful

These criteria shall be included in the premises for choosing specific measures and evaluating the effect of these measures at a later stage.

Other examples of specific topics during the senior appraisal interview could include:

1. Introductory information on the objectives and content of the senior appraisal interview and on UiO's goals for its senior policy.
2. Features of the institution's development:
 - What are the future expectations and challenges the institution is facing?
 - What contribution does the senior employee envisage making with regard to the future development of the institution?
3. The senior employee's views of his or her own working situation:
 - Do they think the job is meaningful?
 - Are there any areas that can be a burden?
4. Would it be desirable to have:
 - academic or personal development, renewal or specialization?
 - more or less responsibility, larger or smaller workload?
 - more variation or more routine work?
 - more influence on the job content and job situation?
 - more instruction and feedback?
 - more flexible practical organization of working hours or of the working situation in general?
 - special physical adaptation?
5. More specifically about relevant opportunities for development/change, as seen from:
 - the point of view of the senior employee
 - the point of view of the manager
6. Is there a wish for a gradual reduction in working hours? Duties should be adapted for employees over the age of 62 who want to make the transition to reduced working hours in combination with part-time retirement (AFP).
7. Clarification and assessment of available instruments; planning of relevant measures.

8. A concluding summary and assent to document any measures in a written agreement. Follow-up is expected to be undertaken in daily HR management, but the agreement shall also form the basis for evaluation and further assessment in standard performance appraisal interviews at a later stage.