

# **Theme booklet for managers**

**The good interview on generational  
change, senior agreements, and  
retirement**

This booklet is intended for managers who need to conduct an interview with an employee on how to plan the transition from working life to retirement. The booklet provides inspiration and specific proposals on how you, as a manager, can tackle the interview. The booklet primarily addresses the situation where the employee still has some years left before retiring. The booklet is part of a series, and you may therefore benefit from reading the entire series, which deals in greater detail with preparation for the interview.

## Introduction

As a manager, you are responsible for adopting a long-term approach to staff planning, including assessing how retired employees are to be replaced—just as you must consider how generational change can be effected. Some employees have planned their transition to retirement in great detail, while others have unanswered questions, or even postpone thoughts about retirement altogether.

As a manager, you must be aware that an interview on the transition from a full working life to reduced working hours—or actual retirement—may be a sensitive topic. There may be different reasons for this:

- **Injured professional pride**  
The employee may believe it has something to do with his/her work performance.
- **The employee has not yet considered retirement**  
The thought of preparing for a different life may leave the employee feeling vulnerable.
- **The employee experiences it as irrelevant**  
The topic is taken up at a time when employees feel on top of things and find the thought of retirement irrelevant.

- **The employee does not want to share his/her thoughts on retirement**

Retirement is often considered a private decision, or is thought to have a negative impact on the allocation of resources or the assignment of interesting tasks.

- **Work plays a major role in employees' lives**

Finding a suitable alternative to work can be difficult—just as it can be challenging to lose one's professional identity through retirement.

## Preparation before the interview

At DTU, we have many employees who have been with the university for many years. It is important to initiate a good interview process with the employee so that you can show respect and appreciation for the person's long-standing contribution and offer a dignified withdrawal from the labour market. Naturally, work capacity and energy change with age, and on the home front, retirement may hold the prospect of grandchildren or a spouse who is also approaching retirement age. If you have the opportunity, start the interview process in good time, so you can discuss retirement on the basis of the employee's well-being (e.g. motivation, performance, performance or commitment) and organizational considerations (e.g. employment of new employees, or hand-over of knowledge).

You can also consider the following in relation to what is going to happen with the area of professional specialization that falls under the employee:

- Is it to be closed down because the field has become too narrow?
- Is it a strategically important subject area with future potential?
- How can you best maintain or hand over the knowledge the employee possesses?

Before the interview, you should make sure that you are familiar with DTU's senior policy and the opportunities that exist for senior agreements. You can benefit from discussing the matter with your HR Partner.

In the supplementary introductory folder, you can read more about how best to prepare for the interview, and also how to invite an employee to the interview.

### **During the interview**

The starting point for your interview with the employee is that it is a natural part of your responsibility to ensure generational change and planning for the future. To facilitate a productive and meaningful interview on retirement, bear in mind that questions and reflections on private aspects are just as important as the work-related issues. It is, of course, a question of balance, but by addressing both aspects, you, as a manager, are helping to clarify what the employee wants.

Start the interview in a positive manner where possible.

### **Begin, for example, the interview like this:**

"I have invited you to this interview because I want to talk to you about what is going to happen in your working life over the next five years. Let me state for the record that I am very pleased with the results you have achieved over the past few years. You have performed extremely well."

"It is important that we begin thinking about who will be taking over after you leave. You have important knowledge about your field which we also will be focusing on in the future. Therefore, we need to discuss how we can best safeguard your knowledge while ensuring a decent and dignified process of generational change. I want to make sure that we have plenty of time to talk the matter through, and that we ensure a positive process that addresses our respective needs. Have you given any thought to retirement?"

"My goal with this interview is to initiate a discussion on your thoughts and considerations on retirement. It may be that our meeting leads to some considerations that we both need to reflect on. So please see today as a preliminary discussion. I, myself, have decided to retire when I am 65—have you any thoughts on when you want to stop working?"

Once the interview has begun and the employee has had time to respond to your opening remarks, initiate a process of dialogue by being curious and interested in finding out where the employee stands in relation to retirement.

## Ask inquisitive questions

“How do you see your working life 1 – 3 years from now?”

“How do your work plans tally with family and leisure?”

“I know that your work has always come first and your family second. Looking ahead, how can we plan your transition to retirement in the best way possible and at the same time future-proof your field of expertise following your retirement?”

“Is there anything we can do differently starting from today?”

“Is there anything in relation to your spouse affecting your retirement situation?”

“If we were to imagine that we were close to the time when you either cut back on your working hours or retired, what would be important for you?”

“Very few people make the transition from a hectic working life to retirement in a single day.” A gradual reduction in working hours allows you to give higher priority to grandchildren and hobbies, for example. And that can help the process of transition the day you stop. Have you considered this model?”

Would it be relevant to cut back on the number of hours (senior agreement) or grant you the status of emeritus professor?

## Continued...

Would it be relevant to cut back on the number of hours (senior agreement) or grant you the status of emeritus professor?

“If we opt for a senior agreement, what would your preferences be regarding:

- Change of tasks—new tasks
- Volume of tasks
- In-depth study/specialization
- More/less responsibility
- Reduction of working hours
- Other?”

Following up on the interview is just as important as the interview itself if you have initiated a process of dialogue. The purpose of this interview and any subsequent meetings is to prepare the employee and the organization for generational change. It also provides the best means of finding the right solution—one where both parties feel they have influence and control over the ongoing process.

### **Finish, for example, the interview like this:**

“It’s time to round off the meeting. Is there anything you would like to add, before we conclude?”

Is there anything that you are concerned about?

“Thank you for today’s interview. I know that you were quite surprised that I invited you for an interview about retirement so soon. I hope I have left you with the clear sense that I am very happy with your performance, and that I am solely motivated by the desire to maintain and further develop your area of research.”

“I suggest that you go home and think about what we have discussed. And that you also talk things over with your spouse. Let us talk again in a couple of months before we formulate a plan. I will invite you to a new meeting closer to the time.”

Make it clear that any agreements can be adjusted, and that the employee is free to contact you if the need arises.

### **After the interview**

It may be a good idea to prepare a summary of the interview—you can read more about this in the introductory folder. Remember that as in the case of the performance review, the interview is a confidential conversation between the manager and the employee—unless otherwise agreed.

In accordance with DTU’s senior policy, before entering into any agreement, encourage the employee to talk to his/her unemployment and pension fund regarding the impact the agreement will have on the employee’s economy on retirement.