



# **MATURE Research Report**

**10<sup>th</sup> June 2013**

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# Research Report

## 1. Introduction

*“Inclusion is a sense of belonging: feeling respected, valued for who you are; feeling a level of supportive energy and commitment from others so that you can do your best work.” (Miller, Frederick A. and Katz, Judith H. 2002)*

The MATURE project will address the training needs of practitioners in adult education in respect of reaching, engaging and motivating older adults who do not readily participate in learning. Our focus is on overcoming age related barriers, aggravated by additional disadvantage caused by health, dependency, cultural and/or attitudinal issues that impact negatively on participation. The project considers the role of intermediary agencies in empowering older people to take part and presents a model of learning that is collaborative within and beyond education providing for the well-being of seniors through integrated responses to learning need.

This report is one of a number of activities that the MATURE team undertakes together in order to create relevant training content for its Continuing Professional Development programme. Here we gather information from a number of sources in partner countries and beyond about participation, disadvantage and successful practice. This information contributes to the theoretical basis for MATURE’s work; provides us with key messages to be transmitted through training and affords trainees insight into the provenance of their CPD.

### **1.1 Background of the MATURE project**

MATURE targets group learning in formal and non-formal contexts. We acknowledge that ‘learning’ happens in a multitude of ways. We know that group learning is a minority pursuit for the majority of adult learners. We don’t wish to force people to enlist. We do want to play a part in ensuring that those who do sign up enjoy a relevant experience and that the pathways of those aspiring to join are eased. Part of this process involves ‘selling’ group learning to the uninitiated and sceptical. Successful selling relies on a quality product. MATURE sets out to enhance later life learning by working with and for group facilitators to ensure that they have the tools they need to do a good job.

In order to discover more about the MATURE project and its team members, visit its website: <http://matureproject.eu>

MATURE partners have worked together before on later life learning and ageing projects:

- LISA – Learning in Senior Age (R3L-LISA-2003-0292-16-09-03, [www.bia-net.org/lisa](http://www.bia-net.org/lisa)). The establishment of regional networks in partner countries with representation from older adults and a wide variety of public, private, voluntary organisations working with seniors directly or as intermediaries. The focus of the network was to open the debate about the real purpose of learning for older adults and to begin to identify the nature and style of new content and delivery modes.
- LENA – Learning in the post professional phase (116627-CP-1-2004 1-AT-GRUNDTVIG-G1) [www.bia-net.org/lena](http://www.bia-net.org/lena). A project to develop a new approach to the planning and delivery of learning for older adults. The LENA guide demonstrates how to develop curricula **with** end users, not for them, to create learning that closely matches the needs of older adults. The guide illustrates the impact in classrooms and on the teaching of placing the learner at the centre of all aspects of planning and delivery and suggests strategies and resources for coping.
- LARA – Learning, a Response to Ageing: (142317-LLP-1-2008-1-DE-GRUNDTVIG-GMP), [www.laraproject.net](http://www.laraproject.net). The creation of a training package for learning facilitators with a new paradigm of competences for ageing illustrating how learning must evolve to address a major social agenda. The package is for group leaders, teachers and trainers to enable them to tailor delivery and content towards skills that support individual independence and success throughout life.
- EuBiA – Broadening People’s Minds in Ageing (2008-1-AT1-GRU06-00057 1), [www.bia-net.org/EuBiA](http://www.bia-net.org/EuBiA). A guide ‘Getting Older People Involved in Learning’ that demonstrates the benefits of networking in the achievement of teaching and learning for older adults that can be defined as ‘good practice’.

These projects have considerable influence on the work of MATURE since they highlight themes and hypotheses that have led partners to the point of wishing to apply previous theory and practice to the stubborn issue of non-participation in learning by older adults.

Messages about teaching and learning inherited from these projects are discussed later but, as well as this focus, project work has led us to common perceptions in a number of other areas:

Our views on ‘older’, ‘ageing’ and ‘later life’ learning include:

- Disregard for chronological definitions.
- Consideration of the life course as a non-consecutive series of stages and transitions.
- Belief that a successful later life is an outcome of good ageing.

- Conviction that good ageing comes about through the lifelong accumulation of knowledge and skills that promote independence and active participation in society, community and family.
- Acknowledgement of synergies between well-being in later life and learning.

We regard group learning facilitators as:

- professional teachers of adults;
- professional teachers from other educational sectors;
- volunteer teachers;
- individuals with a particular skill to share;
- professionals and volunteers in services that do not have education as their main activity (health organisations; housing providers and services within housing, for example);
- facilitators of clubs and other informal meeting groups.

We understand that training for group facilitators can be:

- extremely variable;
- frequently dependent on individual and independent action that is self-funded;
- targeted at organisational not learner need;
- subject not people focussed;
- aimed at rectifying error more than inspiring creativity;
- inclining to the theoretical and pedagogical rather than the practical;
- lacking in consistency and coherence.

MATURE uses the experience of its partners old and new to build on work that has gone before. The project's training will provide one more element of a significant programme, articulated through the outputs of previous projects, that shows how learning for and in later life can be configured to best advantage.

### ***1.2 What do we mean by a research report?***

This report presents the outcomes of an initial information gathering exercise along lines of inquiry that we need to pursue in order to develop the project's outputs. It is neither comprehensive nor scientific in its approach. As the project progresses we anticipate further sources, concepts, strategies and ideas will influence our thinking and reference to these will be found in MATURE products and on the website. This is our starting point reminding us of the work that we and others have already undertaken. We do not intend to 'reinvent wheels'; we want MATURE to move forward using what has gone before to create something new for teachers.

Voices within adult education have the potential to generate as effective practice as datasets. In acknowledgement we have sought two kinds of information from MATURE partners: data about participation and disadvantage and case studies to illustrate solutions and good ideas in later life learning.

We know that the collection and collation of data about adult learning can be an imprecise activity. Partners have been advised to extrapolate key findings from up to 5 data sources concerned with participation and disadvantage in their countries. To this we add material from a number of other sources (projects and thematic networks; EU statistical information; literature review) to enhance our understanding of participation in learning by older people and of the impact of disadvantage.

From this body of information we will extrapolate themes in common and national variations from those themes. This information will inform the development of training content which will address 'European' issues but be sufficiently flexible to account for national variation that demands alternative responses.

Case studies provided by MATURE partners begin to build a picture of actual activity in later life learning that may furnish templates for future action. Training that is based on models of practice that have worked can be more motivating and more reassuring for practitioners than theory based learning. We will continue to collect case studies throughout the project as we meet up with adult educators virtually and through our pilot training sessions and as MATURE makes links with the wider European Lifelong Learning Community.

## **2. Participation**

Our prime concern in MATURE is participation in group learning by older adults. Of late participation has evolved into a measurement of independence, well-being and active ageing for older adults. Participation in learning is viewed as a means of regaining or finding positive ways to be 'engaged' and 'empowered' well into later life.

### **2.1 Demography**

What do we know about older adults in Europe?

The Eurobarometer 2012 Active Ageing Report confirms that:

'Definitions of 'old' and 'young' differ across countries. On average, Europeans believe that people start being considered as old just before 64 years and are no longer considered young from the age of 41.8 years.'

There is a wealth of European demographic information including:

Eurostat 2012 Ageing report:

[http://ec.europa.eu/economy\\_finance/publications/european\\_economy/2011/ee4\\_en.htm](http://ec.europa.eu/economy_finance/publications/european_economy/2011/ee4_en.htm)

The greying of baby boomers:

[http://epp.eurostat.ec.europa.eu/cache/ITY\\_OFFPUB/KS-SF-11-023/EN/KS-SF-11-023-EN.PDF](http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-SF-11-023/EN/KS-SF-11-023-EN.PDF)

Ageing characterizes the demographic perspectives of the European Societies:

[http://epp.eurostat.ec.europa.eu/cache/ITY\\_OFFPUB/KS-SF-08-072/EN/KS-SF-08-072-EN.PDF](http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-SF-08-072/EN/KS-SF-08-072-EN.PDF)

Demography, Active Ageing and Pensions – Social Europe guide, volume 3.  
<http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=6805&type=2&furtherPubs=yes>

On the whole there remains a sense of unease about demographic trends:

‘... (by 2060) the demographic old-age dependency ratio (people aged 65 or above relative to those aged 15-64) is projected to increase from 26% to 52.5% in the EU as a whole over the projection period.’

Eurostat 2012 Ageing report

[http://ec.europa.eu/economy\\_finance/publications/european\\_economy/2011/ee4\\_en.htm](http://ec.europa.eu/economy_finance/publications/european_economy/2011/ee4_en.htm)

## **2.2 Doing something about the ‘demographic time bomb’**

Unsurprisingly it is the impact on the economy of large numbers of dependent older adults that gives rise to the greatest concerns. A number of actions become necessary to minimise the economic burden of dependency in older age.

‘Enabling older people to live full and independent lives for as long as possible is hugely beneficial – to older people themselves but also to the economy and society as a whole.’

Demography, Active Ageing and Pensions – Social Europe guide, volume 3

<http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=6805&type=2&furtherPubs=yes>

‘Allowing older people to remain active and independent as they grow older and to continue contributing to society is the key to tackling the challenge of demographic ageing’

[http://ec.europa.eu/public\\_opinion/archives/ebs/ebs\\_378\\_en.pdf](http://ec.europa.eu/public_opinion/archives/ebs/ebs_378_en.pdf)

Health care costs are of particular concern:

‘Healthy life years also monitor health as a productive or economic factor. An increase in healthy life years is one of the main goals for EU health policy, given that this would not only improve the situation of individuals (as good health and a long life are fundamental objectives of human activity) but would also lead to lower public healthcare expenditure and would likely increase the possibility that people continue to work later into life. If healthy life years increase more rapidly than life expectancy, then not only are people living longer, but they are also living a greater proportion of their lives free from health problems.’

[http://epp.eurostat.ec.europa.eu/statistics\\_explained/index.php/Healthy\\_life\\_years\\_statistics](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Healthy_life_years_statistics)

Overall the focus is on finding, celebrating and increasing activities undertaken in later life that support both the individual and societies. Recognition of the value of the roles that older people regularly undertake (volunteering and caring) is matched by the

aspiration to do better in areas that underpin the likelihood of more older people becoming less dependent (improving health care; access into and within paid work; technological competence; engagement).

‘...27% of Europeans aged 55 and over engage in activities and voluntary work in a variety of organisations and devote on average 14 hours per month to such activities. Men aged 40-54 and 55 and over seem to engage more in volunteering than other groups. 36% of Europeans aged 55 and over have, over the past 12 months, informally provided support to other people not belonging to their household. 15% are currently taking care of an older family member, and another 42% have done so in the past.’

Eurobarometer Active Ageing Report 2012

[http://ec.europa.eu/public\\_opinion/archives/ebs/ebs\\_378\\_en.pdf](http://ec.europa.eu/public_opinion/archives/ebs/ebs_378_en.pdf)

‘.....successful active ageing requires commitment and involvement from all stakeholders in a context that supports learning....’

Cedefop Working and Ageing 2012:

[http://www.cedefop.europa.eu/EN/Files/3064\\_en.pdf](http://www.cedefop.europa.eu/EN/Files/3064_en.pdf)

The European Innovation Partnership on Active and Healthy Ageing outlines a common vision and a set of 14 operational priority actions to address the challenge of ageing through innovation. The partnership encourages collaborative responses from a range of stakeholders aimed at improving the context in which people age and eradicating barriers to independent later life.

[http://ec.europa.eu/research/innovation-union/index\\_en.cfm?section=active-healthy-ageing&pg=home](http://ec.europa.eu/research/innovation-union/index_en.cfm?section=active-healthy-ageing&pg=home)

Older people organisations and religious ones, as well as, regional and local authorities, media, national governments and trade unions are considered as having the most important role in tackling the challenges of the ageing population.

[http://ec.europa.eu/public\\_opinion/archives/ebs/ebs\\_378\\_sum\\_en.pdf](http://ec.europa.eu/public_opinion/archives/ebs/ebs_378_sum_en.pdf)

### **2.3 Why participate?**

The aspirations of the *2012 European Year of Active Ageing and Intergenerational Solidarity* allude to the need for continuous engagement:

‘Active ageing means growing old in good health and as a full member of society, feeling more fulfilled in our jobs, more independent in our daily lives and more involved as citizens. No matter how old we are, we can still play our part in society and enjoy a better quality of life. The challenge is to make the most of the enormous potential that we harbour even at a more advanced age..... The European Year seeks to ensure greater recognition of what older people bring to society and create more supportive conditions for them..... Active ageing also means empowering us as we age so that we can remain in charge of our own lives as long as possible.’

<http://europa.eu/ey2012/ey2012.jsp?langId=en>



## 2.4 Where does learning fit?

The *Eurobarometer 2012 Active Ageing* report states that:

‘Civil society is composed of a range of organisations, for example charities, non-profit making bodies, community groups, faith organisations, professional or business associations, trade unions, sports clubs, or groups of people that meet to practise a range of sports, past-times and hobbies. These social networks are a key facilitator of participation in society, providing an opportunity for older persons to continue learning and to share their knowledge and experience, while also offering the opportunity to engage with friends, family, neighbours and other generations.’

In addition ‘....social contact and relations with other people are thought to have a considerable positive influence on an individual’s well-being and health. Indeed, the continued participation of older persons in society may maintain their feeling of self-worth, thereby avoiding risks associated with isolation, a loss of confidence or reduced self-esteem.’

[http://ec.europa.eu/public\\_opinion/archives/ebs/ebs\\_378\\_en.pdf](http://ec.europa.eu/public_opinion/archives/ebs/ebs_378_en.pdf)

Learning and, in particular, lifelong learning has a key part to play in the promotion of active ageing:

‘...making a reality of life-long learning is important for people of every age because the need to refresh skills and acquire new ones in order to keep up (...) is critical.’

Demography, Active Ageing and Pensions – Social Europe guide, volume 3.

<http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=6805&type=2&furtherPubs=yes>

‘Education and training are now perceived as the basis for continuous, i.e. lifelong, learning, which is aimed at promoting individual motivation and ability to extend and update knowledge, skills and competences continuously throughout life (Dehmel, 2005; Achtenhagen and Lempert, 2000). Lifelong learning is vital for people of all age groups, but the participation of older people in particular in lifelong learning needs to be increased, since their participation is significantly lower than that of younger generations (Cedefop, 2011b).’

Cedefop Working and Ageing 2012 [http://www.cedefop.europa.eu/EN/Files/3064\\_en.pdf](http://www.cedefop.europa.eu/EN/Files/3064_en.pdf)

The relationships between learning, health and active ageing are explored in detail in ‘One Step up in Later Life’ (European conference background note and report 2012):

‘Participation in active citizenship is a key element of strengthening cohesion and democracy and has the potential of improving the well-being of individuals and societies.’

[http://ec.europa.eu/education/adult/doc/confageing/briefs\\_en.pdf](http://ec.europa.eu/education/adult/doc/confageing/briefs_en.pdf)

‘ But older people are not only a strain to societies – they are also an invaluable part of them. The European Year 2012 of Active Ageing and Solidarity between Generations emphasises the potential social and economic contribution that older people can make. By staying healthy and active, older people can stay in working life longer, contribute to civil society through volunteering, share their knowledge and experience with younger generations and live independently for longer. Active ageing means active participation and a voice in society that enable older people to enjoy their entire lives to the full.’

[http://ec.europa.eu/education/adult/doc/confageing/backnote\\_en.pdf](http://ec.europa.eu/education/adult/doc/confageing/backnote_en.pdf)

Learning is a key consideration in the aspiration to lengthen working lives in particular in respect of helping older adults to acquire the technological skills they need in order to be of use in today’s workplaces.

(Lifelong Learning) ‘...may be particularly important for older workers because of negative perceptions of their capacity to adapt to technological and organizational change.’

The Eurobarometer survey on Active Ageing 2012 includes a view of participation in learning across the EU in 2009. (NB 64 years of age is the current cut off point for statistical information about lifelong learning in the EU).

‘There were an estimated 1.67 million students aged 40 and above studying in the EU-27 in 2009, accounting for 1.8 % of the total student population. The share of students aged 40 and above in the total number of students varied considerably, rising to above 5 % in Belgium, Finland, Portugal and Sweden, while falling below 0.5 % in Cyprus, Germany, Ireland, Italy or Luxembourg.’

Across the EU-27 some 9.2 % of the population aged 25 to 64 participated in education and training in 2009; the share for persons aged 55 to 64 was half the average level, at 4.6 %. Almost one in four (24.4 %) persons aged 55 to 64 participated in education and training in Denmark in 2009. This was a much higher share than in any of the other Member States, with Sweden, Finland and the United Kingdom the only other countries to record percentage shares that were in double figures.’

Demography, Active Ageing and Pensions – Social Europe guide, volume 3.

<http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=6805&type=2&furtherPubs=yes>

## **2.5 What do MATURE partners say about participation in group learning?**

The correlation of comprehensive and robust data about participation in learning groups by older adults is not yet possible at national level among MATURE partner countries. Reasons for this include: the multiplicity of definitions of learning; the wide

range of statutory, voluntary and community learning providers; variable requirements for data collection; inconsistent criteria for the collection of data.

MATURE partners have sought information about participation from up to five different national sources. From these certain common messages can be extrapolated:

- Participation in learning declines with age.
- Participation in learning as an older adult is strongly influenced by previous educational achievement. Those who are 'educated' are more likely to participate.
- Socio-economic factors impact on decisions to participate or not.
- Older adults are more likely to participate in leisure/cultural focussed 'informal' learning than in vocational training.
- Informal learning is closely associated by learners with quality of life and well-being in older age.
- There is a noticeable shift in local, regional and national funding priorities towards vocationally orientated courses; learning for employment and employability.
- Older people who do not learn in groups learn from their social and family networks and from independent 'study' using libraries, museums, the media and computing as sources of knowledge and information.
- Group learning is viewed as an important facilitator of participation for older people; the influence of 'community' is beneficial in sustaining an active later life.
- Social inclusion and the offsetting of dependency become powerful motivators for learning in advancing years (60+) replacing the impetus to improve job prospects which is a key driver for the 'younger old' (50+).
- Other motivations include: keeping the brain active; acquiring new knowledge and practical skills for everyday life.
- Inability to see the need for or benefits of learning is a significant barrier to participation for older people.
- Other barriers include: health; access; price; family and care commitments; insufficient support; *'not for the likes of me'* mentality.

There are some notable national reflections by MATURE partners on participation:

- In the UK, Poland, Portugal and Slovenia the Universities of the Third Age are flourishing. In the UK membership has increased every year since the inception of U3A thirty years ago and now stands at 295,813 members in 870 U3As. In Poland some 70,000 members aged 55 and over enjoy courses offered by 400 U3As. In Portugal the movement began in 1976 and now comprises 175 U3As that engage 30,000 seniors and 2500 volunteer teachers. In Slovenia, U3As operate in 42 towns and cities reaching 20,000 participants and working with 1000 volunteers and 2000 mentors.
- In the UK there has been a marked decline in participation in IT courses by older (50+) adults (from 40% in 2005 to 17% in 2012). The younger cohorts of older adults have acquired computing skills in work places pre-retirement.

- In the UK, social class has an impact on participation with those in social classes AB three times more likely to be learners.
- In Germany employment status plays a role in participation. The unemployed are less likely to learn. In recent years, there has been an increase in participation in learning by people between the ages of 55 and 65. This increase is attributed to older adults remaining in employment longer.
- In Switzerland 40% of adults participate in organised continuing education programmes. Older adults have access to a variety of courses offered by Volkshochschule and Senioren Universität.
- A focus on basic skills in the North West has led to joined-up approaches to networking, teacher training, awareness raising and the promotion of AE in work places.
- There is little variation in participation by gender among older adults in Austria, Germany and the UK; older men and women participate in equal numbers. In Portugal the majority of U3A participants are women (78%) and this pattern is repeated in Slovenia where the profile of the 'typical' U3A student was female aged between 61 and 69.
- EU statistics show that Greece has the lowest levels of participation in lifelong learning with 0.3% of 55-64 people in learning. Statistics from other partners show varying degrees of participation in learning (42.7%, for example, in Slovenia) but in a context where all make reference to the correlation between declining participation and ageing.
- The prevalent perception of lifelong learning in Greece is that it exists as a compensatory measure for those who did not do well at school. 21% of Greeks view lifelong learning as unimportant.

### **3. Disadvantage**

One of the principal purposes of the MATURE project is to support learning providers to reach out to, engage with and motivate older adults who might draw benefit and enjoyment from group learning. From previous project work, MATURE partners have a number of tried and tested strategies for developing and delivering learning that works well for older people, that addresses issues of ageing and that is successful in attracting non-traditional participants. It has become apparent, however, that a number of significant, age-related or age-aggravated barriers demand specific attention in order to truly widen participation.

Among the many disadvantages potential learners face, MATURE partners have chosen to focus on the following:

**Health** – physical and/or mental conditions that affect an individual's ability to participate in learning and/or be active in other areas of daily life. They may be conditions that have been lifelong or that arise as a result of ageing.

**Dependency** – the point at which an individual can no longer function effectively without consistent support from others. This support may come from family members, the state, private care organisations.

**Culture** – the cumulative knowledge, experience, beliefs and values of a group of people. Older migrants, older members of minority ethnic communities, older members of faith groups may be among those who experience cultural barriers to participation in learning and in the wider communities in which they live.

**Attitude** – the beliefs of older adults and the perceptions of others about age and ageing people. Positive and negative views of ageing, learning, education, status contribute to the formation of beliefs about oneself, one's role, one's rights, the responsibilities of others.

Our rationale for this selection comes from our work together in other European projects and individually at national level where we have expertise and experience in addressing specific learning need. We anticipate that in seeking to minimise barriers created by these areas of disadvantage we may create templates for more general action that will encourage participation from those who are hardest to reach.

### ***3.1 Discrimination and age-related disadvantage: the European perspective***

'Discrimination is still considered to be common in the EU Member States. The three most widely perceived grounds are "ethnic origin" (56%), "disability" (46%) and "sexual orientation" (46%). Ethnic origin remains the most widely perceived ground for discrimination in the EU (56%; down from 61% in 2009).'

Age UK's 2011 report 'Grey matters – a survey of ageism across Europe' finds that:

'.....more than a third of all Europeans experience age discrimination, and that a majority of these are facing serious unfair treatment.'

[http://www.ageuk.org.uk/Documents/EN-GB/For-professionals/ageism\\_across\\_europe\\_report.pdf?dtrk=true](http://www.ageuk.org.uk/Documents/EN-GB/For-professionals/ageism_across_europe_report.pdf?dtrk=true)

Disadvantage related to age and age discrimination:

'When it comes to discrimination against people aged 55 and over, the survey shows that half of Europeans perceive it as rare or non-existent (50%), whereas 45% of Europeans believe this type of age discrimination is widespread.'

'An indication that "old" age discrimination is mainly seen as an employment issue is confirmed by the finding that many Europeans believe that equal opportunities in employment could be improved: many personal characteristics are thought to put applicants at a disadvantage in the recruitment process. Being over 55 years old is seen as the factor most likely to lead to a disadvantage.'

‘The economic crisis is contributing to more discrimination in the labour market, especially for older persons, and is impacting negatively on policies promoting equality and diversity. Discrimination in employment against people over 55 years old is seen as a significant problem in 2012.’

Eurobarometer Report June 2012 discrimination

[http://ec.europa.eu/public\\_opinion/archives/ebs/ebs\\_393\\_sum\\_en.pdf](http://ec.europa.eu/public_opinion/archives/ebs/ebs_393_sum_en.pdf)

*The Special Eurobarometer report on Active Ageing 2012 comments as follows:*

Workplace age discrimination is the most widespread form of age discrimination with one in five citizens having personally experienced or witnessed it. Age discrimination is less common in access to education and training and leisure with only around one in ten having experienced or witnessed each. More respondents say they have personally been discriminated against and have witnessed it.’

[http://ec.europa.eu/public\\_opinion/archives/ebs/ebs\\_378\\_en.pdf](http://ec.europa.eu/public_opinion/archives/ebs/ebs_378_en.pdf)

The report highlights perceptions of older adults across European states with 8 out of 10 survey respondents believing that older people play a major role in the care and financial support of families; seven out of ten believe they have a major role in politics and are active in local communities; 67% feel that they play a major role in the economy.

### **3.2 Healthy ageing in Europe**

Eurostat Healthy Life Years Statistics, September 2012 tell us that in Europe:

‘...it is clear that there are wide differences between EU Member States in terms of the quality (health wise) of life that their respective populations may expect to live, when compared with the overall differences in the length of their lives. Men born in Slovenia in 2010 could expect to live 69.9 % of their lives free from any activity limitation, a share that rose to as high as 90.1 % in Sweden (where the highest life expectancy was recorded). In contrast, a woman born in 2010 in either Slovenia or Slovakia (where the lowest life expectancy was registered) could expect to live somewhat less than two thirds (65.7 %) of her life free from any limitation, a share that rose to 86.7 % in Bulgaria.’

[http://epp.eurostat.ec.europa.eu/statistics\\_explained/index.php/Healthy\\_life\\_years\\_statistics](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Healthy_life_years_statistics)

The OECD report ‘Health at a Glance: Europe 2010’ has the following to say about health and life expectancy in Europe:

‘Life expectancy at birth in EU countries has increased by six years since 1980, reaching 78 years in 2007..... Whether the gains in life expectancy involve additional years of life lived in good health has important implications for health and long-term care systems in Europe. Healthy life years at birth are defined as the number of years of life in which

a person's day-to-day activities are not limited by a condition or health problem. In 2005-07, healthy life years stood at 61.3 years for women and 60.1 years for men, on average, in the European Union. The gender gap is much smaller than for life expectancy, reflecting the fact that a higher proportion of women's lives are spent with activity limitations.'

[http://www.oecd-ilibrary.org/social-issues-migration-health/health-at-a-glance-europe-2010/executive-summary\\_9789264090316-3-en](http://www.oecd-ilibrary.org/social-issues-migration-health/health-at-a-glance-europe-2010/executive-summary_9789264090316-3-en)

The authors of the 2007 project report 'Healthy Ageing – a Challenge for Europe' identify a number of areas for action in order to sustain independence and autonomy in later life. Their definition of healthy ageing is as follows:

'Healthy ageing is the process of optimising opportunities for physical, social and mental health to enable older people to take an active part in society without discrimination and to enjoy an independent and good quality of life.'

Among the areas for action they propose are:

- **Social capital.** A high level of social capital enhances a person's sense of belonging and well-being. Providing opportunities for older people to do voluntary work among seniors improves the quality of life of the volunteers and those who receive the services. Low social capital correlates with mortality.
- **Mental health.** Ageing is a gradual process and there is much we can do to promote good mental health and well-being in later life. Participation in meaningful activities, strong personal relationships and good physical health are key factors, while age discrimination has a negative impact. Poverty is a risk factor for mental ill-health.'

Among the issues that the report highlights is:

'The key issue is how to persuade people to change habits, especially those who for cultural, social and/or economic reasons are least inclined to do so. Gender has also to be considered: men are more difficult to motivate to participate in activities than women are. The 'good practice' projects suggest that involving people from the target group in the planning and implementation phases may empower the less motivated and encourage their participation.'

And recommendations include:

*Autonomy and personal control* Autonomy and personal control are essential for human dignity and integrity throughout life. All individuals must have the opportunity for self-development and should take part in making decisions that concern them.

*Heterogeneity* Heterogeneity among older people must be taken into account. It includes differences in gender, culture and ethnicity, sexual orientation orientation, and variations in health, disability and socioeconomic status. The generation gaps among older people must also be taken into account. There are several generations between people aged 50 and those aged 100+.



*Social capital* Encourage the participation of older people in the community. Increase educational and social activity group interventions targeting older people to prevent loneliness and isolation. Provide opportunities for voluntary work by older volunteers.'

<http://www.healthyageing.eu/sites/www.healthyageing.eu/files/resources/Healthy%20Ageing%20-%20A%20Challenge%20for%20Europe.pdf>

The 2012 EU 'Healthy and Active Ageing' report provides a selection of policies, programmes and interventions that are currently or have been applied in the EU and its Member States, as well as by WHO and Canada, to promote the health of 'younger' older people.

Its executive summary states that:

'Healthy ageing is about enabling older people to enjoy a good quality of life. Healthy ageing strategies should create the conditions and opportunities for older people to have regular physical activity, healthy diets, social relations, participation in meaningful activities and financial security. This involves holistic approaches that address both mental and physical health, as well as a cross-sectoral approach to improve the social determinants of health, such as safe living environments, a flexible pension system and related retirement policies. Healthy ageing can therefore not be achieved through a single initiative, but requires a range of actions and approaches at individual and societal level that work together to achieve this outcome. Healthy ageing also requires a structural paradigm change, as older people must desire and maintain the ability to play an active role in society, while society must in turn encourage and accommodate this.'

<http://www.healthyageing.eu/sites/www.healthyageing.eu/files/resources/Healthy%20and%20Active%20Ageing.pdf>

### **3.3 Older migrants in Europe**

'Of the six forms of discrimination examined in the survey, discrimination on the ground of ethnic origin is perceived to take place most widely. Close to one respondent in five considers this form of discrimination to be very widespread in his or her country (19%) and a further 45% believe it is fairly widespread. Only 2% of the interviewees believe it does not exist.'

Special Eurobarometer report: discrimination in the European Union. January 2007  
[http://ec.europa.eu/justice/discrimination/files/eurobarometer\\_263\\_sum\\_en.pdf](http://ec.europa.eu/justice/discrimination/files/eurobarometer_263_sum_en.pdf)

The EU has developed 11 Common Basic Principles for Integration. These confirm the need for migrants to attain full participation in society, host communities and workplaces; their right to be active in democratic processes and to acquire equal access to institutions and public and private services. Integration is a two-way process where intercultural dialogue, understanding and accommodation of difference and



meaningful contact are established between migrant communities and Member State citizens.

EU integration policies focus on employment; education; social inclusion and active citizenship. Employment embraces unemployment and activity rates; education focuses on levels of education achieved and attainment; active citizenship includes consideration of residency and representation on elected bodies; social inclusion policies cover income; poverty; health; property ownership.

In 2013 Eurostat will publish a set of indicators to measure the impact of EU integration policies.

[http://ec.europa.eu/ewsi/en/EU\\_actions\\_integration.cfm](http://ec.europa.eu/ewsi/en/EU_actions_integration.cfm)

In order to support Member States in the implementation of sound integration policies the EU is in the process of preparing modules that address specific elements of the Common Basic Principles for Integration. Three draft modules have been published:

1. Introductory and language courses (integration implies respect for the basic values of the EU by every resident and that basic knowledge of the receiving society's language, history, and institutions is indispensable to integration).
2. Strong commitment by the receiving society (ensure access for migrants to institutions, as well as to public and private goods and services, on a basis equal to national citizens and in a non-discriminatory way).
3. Active participation of immigrants in all aspects of collective life (the participation of migrants in the democratic process and in the formulation of integration policies and measures, especially at the local level, supports their integration. The practice of diverse cultures and religions must be safeguarded, unless they conflict with inviolable rights or law).

[http://ec.europa.eu/ewsi/UDRW/images/items/doc1\\_25494\\_793453556.pdf](http://ec.europa.eu/ewsi/UDRW/images/items/doc1_25494_793453556.pdf)

The profile of migration in the EU is diverse with member states to a greater or lesser degree being home to 'types' of migrants that include: second and subsequent generations; pan-European migrants; migrants from outside the EU; refugees and asylum seekers; relatives of settled citizens; illegal immigrants. The learning needs of these groups vary considerably; their ability or otherwise to access learning is constrained by a number of significant factors ranging from national policy making to personal perception.

In 2011 a Eurobarometer Migrant integration study was commissioned by the Directorate-General for Home Affairs and coordinated by the Director-General Communication of the European Commission.

The objectives of the study were to understand the perceptions of members of the general public towards non-EU migrants and to explore their views about integration. Similarly the study sought to understand the perceptions of non-EU migrants to the general public and to integration.

The following reflections appear in the executive summary of the report:  
'Among the general public, the main obstacles to integration are the same as the main barriers to interaction: language and a perceived lack of willingness on the part of migrants to integrate, which displays itself as migrants living and socialising separately. The main barriers to integration from the perspective of migrants are language, cultural and religious differences and the negative attitude of the general public towards them. Migrants also noted that the segregation of migrants into 'ghettos' and the unwilling attitude to integrate among some migrants also has a detrimental effect on integration.

Among the general public, on average, the top four most important factors that facilitate integration are:

1. Can speak the language
2. Have a job
3. Respect local cultures
4. Enjoy legal status

While among migrants the same factors were identified. However, 'Legal status' was seen as more important.

The factors in order of priority are as follows:

1. Can speak the language
2. Enjoy legal status
3. Have a job
4. Respect local cultures'

[http://ec.europa.eu/public\\_opinion/archives/quali/ql\\_5969\\_migrant\\_en.pdf](http://ec.europa.eu/public_opinion/archives/quali/ql_5969_migrant_en.pdf)

The European website on integration <http://ec.europa.eu/ewsi/en/index.cfm> contains a wealth of information about integration policies and practice and includes examples of projects that will have a bearing on MATURE's work in this area. For example:

Opening doors to adult education for migrants 2012 project – using education ambassadors.

<http://www.learning-community.eu/uploads/File/Opening%20Doors%20to%20Adult%20Education%20for%20Migrants.pdf>

In 'Lifelong Learning – a tool for all ages' (2007) the AGE platform issues a call to arms:

'One challenge for adult learning is to support the integration of migrants into society and the economy and to make the most of their competences and educational experiences acquired prior to migration.'

[http://www.healthyageing.eu/sites/www.healthyageing.eu/files/resources/DocPart\\_Declar\\_LifelongLearning.pdf](http://www.healthyageing.eu/sites/www.healthyageing.eu/files/resources/DocPart_Declar_LifelongLearning.pdf)

### 3.4 Attitudes and perceptions

One of MATURE's hypotheses is that changing hearts and minds is a critical aspect of improving engagement, particularly among those older adults who have been hardest to reach. National data and previous project work have, for example, highlighted the detrimental effect on participation in learning of prior educational achievement. Perceptions of the purpose and value of education vary widely among older people and inform their willingness or otherwise to re-engage with it in later life.

Self perceptions and the opinions of others about competence and the ability to learn as older people undermine engagement. Many feel that 'education' is neither relevant to later life nor within the reach of ageing citizens.

'Attitude' for MATURE partners embraces positive and negative views of education and ageing that impact on the individual's readiness to sign up for learning.

AGE recommends:

- 'It is important to ensure that the wider aspects and benefits of later life learning are evidenced.
- There is a need to counter stereotypes and negative perceptions of older people's needs and capacities to learn.'

[http://www.healthyageing.eu/sites/www.healthyageing.eu/files/resources/DocPart\\_Declar\\_LifelongLearning.pdf](http://www.healthyageing.eu/sites/www.healthyageing.eu/files/resources/DocPart_Declar_LifelongLearning.pdf)

Age UK's 2011 report 'Grey matters – a survey of ageism across Europe' states that:

'Addressing negative attitudes to older people is essential to reduce perceptions of conflict between generations.'

The survey found that:

'...people aged over 70 have the lowest perceived status in European society, even in their own eyes.'

And that:

'...the perceptions of age prevalent across Europe can lead to self-limiting behaviour: 'I am too old for this' or 'I am too young to do that'. They also affect judgements made on the abilities and competence of others – including by employers and service providers. Such ageist attitudes and prejudices reinforce inequalities in society, making later life a time of increased vulnerability, poverty and isolation for many.'

[http://www.ageuk.org.uk/Documents/EN-GB/For-professionals/ageism\\_across\\_europe\\_report.pdf?dtrk=true](http://www.ageuk.org.uk/Documents/EN-GB/For-professionals/ageism_across_europe_report.pdf?dtrk=true)

The European Guide: 'Strategies for improving participation in and awareness of adult learning' (2012) identifies a number of barriers to participation in learning among which:

**‘Psychological barriers:** These concern adults’ life experiences and may relate to negative associations with the schooling environment, lack of confidence, sense of worthlessness, or social exclusion. Action should thus aim at demonstrating societal interest in including these groups of individuals, developing activities in settings other than schools or classrooms, and by adopting approaches that help to overcome traditional fears.’

[http://ec.europa.eu/education/more-information/doc/2012/adult\\_en.pdf](http://ec.europa.eu/education/more-information/doc/2012/adult_en.pdf)

The guide recommends that education providers should:

**‘Communicate individual, social benefits of adult learning:** This is necessary to convince learners of the impact adult education can have on their lives. This includes the promotion of new thinking skills which can make individuals more efficient and more competitive in a global economy as well as more socially cohesive.’

The guide promotes a collaborative approach with social partners and others who: ‘Interact with target groups to educate them on the benefits and importance of adult education.’

And advises providers to:

**‘Thoroughly research specific target groups:** Target groups are differentiated in their attitudes, disposition and approach towards adult learning. This diversity can be found even within the same demographic or socio economic groups. It is therefore important to thoroughly research the specific target group that would be participating in the activity, and ensure that the approach to each group is varied to reflect their needs and to encourage their participation. It is also important to consider the preferences of each target group in terms of information delivery. Only in-depth research can reveal how specific target groups wish to receive information (as a precursor to engagement).’

### **3.5 What do MATURE partners say about disadvantage?**

MATURE partners have sought information from up to 5 different sources to present a brief overview of the impact of disadvantage on older adults in their respective countries. This is a snapshot to stimulate reflection and debate about the likely effects on participation in and commitment to learning in later life.

Key concerns are summarised here:

- Older people remain at considerable risk of poverty; social exclusion and dependency.

- Health and social care issues predominate – disability; malnutrition; dementia; depression; abuse; standards of care adversely affect large numbers of older people, increasing their isolation.
- Older people suffer in comparison to younger adults in gaining access to employment and in remaining mobile and active within workplaces.
- Patterns of participation in learning are rooted in initial education, social class, working status and age.
- There are growing numbers of older migrants unlikely to engage in learning as a result of cultural factors and attitudes to education.
- Those who are isolated (no or limited connections with family and community) are not likely to participate in learning.
- Political and social factors have a clear impact on ageing adults. For, example, the federal structure of some countries leads to variable experiences of health and social care; there are examples of older people seeking professional later life care in order to preserve autonomy and remain independent of family intervention.
- How do we strike an appropriate the balance between relevant, externally supplied support and strategies that promote autonomy in later life? What are the risks in ‘teaching’ people to be too independent?
- There is a discrepancy in attitudes to education and participation. In Austria 61% of older adults value education but only 17% participate in it.

#### **4. Later life teaching and learning**

The MATURE project sets out to equip learning providers with ideas, strategies and resources to support them to address non-participation in learning among older people. Consideration is given to ways of reaching out to older adults, to motivating and effective learning, to classroom practice and management that will lead to really useful and enjoyable learning.

The genesis of the work lies in the outcomes of the 4 predecessor projects in which MATURE team members have been involved in the last 10 years:

- LISA – Learning in Senior Age (R3L-LISA-2003-0292-16-09-03, [www.bia-net.org/lisa](http://www.bia-net.org/lisa)).
- LENA – Learning in the post professional phase (116627-CP-1-2004 1-AT-GRUNDTVIG-G1) [www.bia-net.org/lena](http://www.bia-net.org/lena).
- LARA – Learning, a Response to Ageing: (142317-LLP-1-2008-1-DE-GRUNDTVIG-GMP), [www.laraproject.net](http://www.laraproject.net).
- EuBiA – Broadening People’s Minds in Ageing (2008-1-AT1-GRU06-00057 1), [www.bia-net.org/EuBiA](http://www.bia-net.org/EuBiA).

As discussed above, these projects have helped MATURE partners to define and work with critical aspects of the ageing process and to develop understanding of the

complex circumstances, needs and aspirations that impact on the lives of older people. In turn this has led to the formulation of a view of learning (and, by extension, of teaching) that places it at the heart of a number of interventions designed to promote autonomous longevity.

To date our ambitions for learning are that:

- It is an active and experientially based activity.
- It is conceived and delivered with consistent input from the end user.
- Its effectiveness is judged by the impact on lives and individuals rather than the sum of quiescent skills.
- Its outcomes are many and varied; the most effective for older adults being those that deliver competences to underpin proactive longevity.
- It is not the sole preserve of 'education'. Collaboration and cooperation are key to the development and delivery of learning that works.

MATURE partners are convinced that learning has a major part to play in the maintenance and improvement of critical skills for everyday life and long term well-being. The application of what has been learned is of paramount importance in the drive to sustain independence. Placed centre stage among actions destined to underpin a way of life, learning assumes significance beyond that commonly attributed to it.

The diversity of adult education, its contexts, practitioners and structures make it virtually impossible to achieve consistent approaches to pedagogy, methodology and content. The flexibility that is an inevitable consequence of such diversity provides opportunities to mould learning differently. The MATURE project will support teachers who want to do precisely that; to re-shape what and how they teach in order to overcome barriers and deliver learning that will make a difference to the lives of the people they work with.

#### ***4.1 Lessons from predecessor projects – LISA***

The LISA project (2005) arose as a direct result of the European Commission's 2001 Memorandum on Lifelong Learning. This R3L project was part of a wave of programmes aimed at connecting regional activity and giving it a transnational platform. LISA partners focused on the learning needs of older adults, sharing national good practice and developing a cohesive approach to regional development in support of later life learning.

At the heart of LISA was the theme of collaboration which continues as a major focus of MATURE. LISA partners developed or sourced and contributed to regional networks that brought learning into contact with other major social agendas that impact on the lives older adults. Working with health and social care professionals, with ICT experts,

gerontologists and a wide range of older people, LISA began to look at structures that permitted meaningful dialogue to take place between stakeholders.

A number of outcomes from LISA have a direct bearing on MATURE work:

- The tangible benefits of the development of local and regional cooperative networks based on a democratic model that gives voice to end users as well as service providers.
- Methods and processes for creating and sustaining those networks.
- Commitment to the notion that learning is not the sole prerogative of education providers.
- Understanding that the outcome of asking people about learning may be answers that do not conform to prevailing models of provision.
- Acknowledgement of the social and knowledge capital locked within older adults and belief that learning has the potential to unlock that capital and make it useful for the individual, community and society.

#### **4.2 Lessons from predecessor projects – LENA.**

In LENA, project partners began to model different ways of developing learning for older adults. In doing so, the team acknowledged the visible gains that seniors who were part of learning groups were enjoying but recognised that these people represented only a small percentage of those who could potentially join in.

LENA set out to create learning programmes with end users and with others who could offer expertise and inform the content of new curricula. The outcome was a structure within which relevant learning could be developed and delivered. The structure is founded on negotiation at every stage. Avoiding the prescription so commonly part of adult education programmes, LENA trainers adopted a reactive rather than proactive role. Using discussion as a basis for the development of learning content and to frame delivery models the team piloted learning that was engaging, reached out to the previously disaffected and had a lasting impact on those who took part.

From LENA, MATURE will bring forward:

- A commitment to learning as one of a number of factors that empower older adults.
- Understanding that learning is not simply about putting right deficits but about opening opportunities for sharing knowledge and skills.
- Acknowledgement that making learning more relevant and engaging will demand a change of mindset at strategic, operational and end user level.
- Recognition that the construct of learning may be as important as its content. Investment in the creation of a supportive, empathetic context in which to share ideas and issues, solve problems and move on may be more productive in the longer term than the one-off upskilling opportunity.

- A view that, as with many other aspects of daily life, older adults prefer to do learning *with* others rather than have others do it *for* them.

#### **4.3 Lessons from predecessor projects – LARA.**

The multi-lateral project LARA (2008 – 2010) arose in direct consequence of LENA work. LENA brought partners face to face with issues to do with teacher support and training. The project team quickly realised that a number of factors impacted negatively on opportunities to effect change in adult learning. Extremely limited access to continuing professional development; a diverse work force featuring professionals from a variety of disciplines as well as volunteers; variable levels of expertise and experience in teaching and learning; little focus on specific target group needs and aspirations; emphasis on subject driven delivery and didactics all contributed to a diet of standard, top down delivery modes more responsive to the teacher than to the learners.

On the other hand, the lack of consistent regulation in adult education permitted innovation, trial and error and ‘out-of-the-box’ thinking that enabled experimentation and the adoption of different, more relevant models of learning. LARA capitalised on the individual teacher’s ability to do things differently by providing a training programme that gave background, theory, practical ideas and justification for change to support the delivery of learning for ageing. In developing the LARA training guide the team provided the impetus to individuals and groups of teachers to reflect on their practice and to be confident about making changes for the benefit of learners.

LARA has a particular relevance for MATURE in that it illustrates features of teaching and learning that will remain at the heart of MATURE’s training programme:

- Teaching is about triggering learning not controlling it.
- Learning is an experiential, active undertaking.
- Learning that works for ageing is based on principles of andragogy; uses facilitation rather than instruction; promotes learning skills not subject matter; encourages participation, reflection, collaboration, problem-solving and action planning; uses individual and collective experience as the prime source of and resource for learning.
- A key purpose of learning is preparation for the navigation of life’s transitional moments and stages.
- The ability to learn and to apply learning across contexts is at least as important as the acquisition of skills and knowledge.
- Learning is one of a number of ‘literacies’ that people need in order to successfully negotiate ageing.
- There is a clear connection between successful ageing and lifelong learning. Later life learning is part of a continuing process that provides the context for older adults to share, develop and acquire skills that impact directly on their ability to maintain independence and autonomy.



- Definitions of 'old' are elusive. Learning is an individual need in a framework informed by considerations of ageing and the advantages and disadvantages it may bring.

#### **4.4 Lessons from predecessor projects – EuBia.**

Concurrent with LARA, the EuBia learning partnership (2010) developed the theme of networking in later life learning. The project team debated barriers and obstacles to participation and their resolution in the context of acknowledging the benefits of learning for older adults.

EuBia partners began a process of looking specifically at the impact of disadvantage on participation initiating strands that MATURE work will seek to develop (for example, disability and ethnicity). Good practice examples from EuBia show how partners from 9 organisations in 7 European countries have formed ways of engaging with and including significant numbers of older adults in learning activities. Above all, EuBia analyses the processes, strengths, weaknesses and opportunities of networking as a means of improving engagement and promoting empowerment.

Arising from EuBia's work MATURE will:

- Pursue the ideal of collaboration as a means of creating rounded and relevant learning.
- Develop in the minds of teachers an understanding of the benefits of cooperation for learners.
- Promote the advantages of networking for teachers (combating isolation; the development of common approaches, understanding and language; mutual support; potential for advocacy and the realisation of new learning).
- Facilitate a community of MATURE trainees and stakeholders and make links with other similar networks.

Connectedness is not easy to initiate or sustain. EuBia found that many thematic networks rely on voluntary contributions and attendance which make them vulnerable. A framework for networking and the sharing of ideas and practice is a valuable commodity. MATURE is fortunate in that it coincides with the creation of just such a framework, ForAge (<http://www.foragenetwork.eu/en/>), a European multi-lateral network which aims at communicating the experiences of lifelong learning to create high standards of practice. MATURE partners will make use of the opportunities ForAge offers to consolidate and disseminate the work.

#### **4.5 Lessons from current practice – case studies.**

Case studies have illustrated principal themes and principles of all of MATURE's predecessor projects. Partners are convinced of the value of case studies both as a stimulus for debate and as an inspiration for action. They will be a feature of the

MATURE modular CPD programme and be used by the team to enliven training through real example. To begin this process MATURE partners have collated a number of examples showing how colleagues have engaged with later life learners and addressed specific learning need.

### **Austria**

#### **REIFER LEBENSGENUSS (“Ripe Enjoyment of Life”), [www.reiferlebensgenuss.at](http://www.reiferlebensgenuss.at)**

The aim of the project is to develop and create a liveable region, beneficial to the health of the people. The project combines approaches of regional development and health promotion which include lifelong learning. The setting of the project is 5 small communities in a rural area of Styria in Austria. With strong participation by the older population (50+) activities to enhance the quality of life of older people in the region are developed. The activities are setting oriented, answering the needs of the older people in small communities. There were two basic principles:

- to bring the offers and activities direct to the people, to the village
- active participation by the people, from concept to implementation.

REIFER LEBENSGENUSS was a nationally funded project, carried out by the FACHHOCHSCHULE JOANNEUM. The funding period was from 2008 to May 2012. After the end of funding the project continues to work well with support from the communities and voluntary work by the older people themselves.

#### *Who helped to make contact with these older adults?*

Contact was made first with the mayors with strong support from the whole community. In each village “village representatives” were nominated. These are older people who are responsible for the implementation of the project and its different activities in the village. They work as multipliers of the project and they connect the older people of the village, their neighbours and friends to the project coordination. Project coordination worked from “outside”. Its principal focus was to lead and implement a coaching process. The people in the 5 villages decide on their own, what they want to do, how they do it, when and with whom.

Contact to the older adults was mainly via the mayor or the “village representatives”.

#### *How and where did that contact take place?*

The contact with the people and the whole community was via “information events”, information evenings or afternoons, where the people were informed about what they could do. It was very important that the invitations were sent from the mayor and that the information came mostly from the “village representatives”.

#### *What key messages were necessary to make learning attractive to these older adults?*

To make the project and the different activities attractive was not easy. One of the key messages was that participants could decide for themselves what kind of activities they wanted. This was the basic principle and also a basis for sustainability, which worked quite well in the end.

The first challenge was that the older people had no idea what they wanted, what kind of course or activity could be of interest to them. It took some time (in some villages nearly a year) until activities really started.

In the end they “learned” to decide what kind of courses they wanted with information from the project team, suggestions for courses, information, dissemination, and many meetings.

*What plans were put in place to make attending group learning acceptable and enjoyable?*

The whole concept of the project focused on “making living in this village/region enjoyable”. The concept that the older people decide by themselves what to do and how and when and where is key to the success of the project and to the positive attitude to learning in the group. The majority of the participants in group learning are not really aware that they **are** learning, they just do what they really like, i.e.

-group dancing, yoga, spinal exercises, computer courses, language courses (English), - nordic walking, hiking

-lectures about homeopathy, herbs, gardening...

-excursions and common events

-just meeting, drinking coffee and talking .... and being part of this group (social inclusion).

### **REIFE ÄPFEL (“Ripe Apples“)**

This project took place between 2002 – 2004. The project team worked in 8 different villages and communities in Styria. The target group was women 50+. Although the project officially finished some years ago, the “ripe apples” are still alive and well in many communities.

“Ripe apples” are groups of women who spend their leisure time together and learn together. Each group has a group leader – a woman from the same village / community. Women feel comfortable in the groups; they know other group members well and this provides a sound basis for group learning. Groups are all open to new members. In communities, groups attract “new” women, who are not used to meeting together and/or who may have concerns about learning.

*How does this learning group operate?*

The group operates not as a “learning group”, but as a group of women who want to spend time together. In reality all the participants learn a lot, they discover what they can do, that they have many skills and abilities and they gain new self-confidence. This is made possible by means of a sensitive group leader operating within the safe context of the group. Group members decide for themselves what they do, if they want to learn, what they want to learn and when and where they want to learn.

*What are people learning in the group?*

The women learn in a non-formal and informal way. The group is a “leisure group” where learning happens. The learning that takes place is tailored to the particular needs of the older women, e.g. brain gym.

Certain common learning needs have been identified. These are: the maintenance of mental capability, communication and social inclusion.

**Germany**

**Computerfrühstück für Ältere (computer breakfast for older people)**

The Computerfrühstück began because planners in the VHS experienced reluctance among older people when it came to joining computer courses, even those designated for older adults. The seniors’ main concerns were:

‘I do not know whether I can follow and then I have to pay the course fee in full, I cannot afford that...’

‘I do not know whether I will be well enough throughout the lifetime of the course...’

‘I only want to learn this one thing (sending mails, booking travel, optimizing my photos...)’

These responses made us think about an alternative: an open offer to learn how to work the computer (including internet use) without the structure of a course. There is no common aim, everyone learns at their own speed and with their own aims.

“Teachers” work in the background to get learners started and to help them with their particular way of learning.

*Who helped to make contact with these older adults?*

Initial contact was made through a small ad in the weekly neighbourhood paper which is mainly read by older people. After that, there was no need to make the programme known publicly, there were always more than enough new learners wanting to join the meetings.

*What key messages were necessary to make learning attractive to these older adults?*

We thought about key messages very hard. They are: openness (you only pay when you come); no commitment, you learn those things you want to learn; no curriculum but a very social atmosphere (coffee, tea, something to eat); a “learning helper” waiting in the background to help when help is needed.

*What changes had to be made by the learning provider to ensure that these older adults could participate in group learning?*

The changes are substantial: no enrolment process; no prior planning of content; more than one responsible person in the room (mostly 2, sometimes volunteers); the creation of a sociable and pleasant atmosphere.

*What plans were put in place to make attending group learning acceptable and enjoyable?*

Finding the right time: late morning, same day as the farmers' market.

Finding the right "teachers": they had to have the right attitude (trust the learners to steer their own learning process, don't overwhelm them with information that is not asked for).

Openness for all: migrants, disabled persons, slow learners. Sometimes learners questioned these values and there had to be meta- discussions among the group to make clear that "all persons" means "all persons" - nobody is excluded.

The provision of coffee, tea, cold beverages and something to eat.

A different perspective on the help of volunteers: before this programme, we did not engage volunteers in group learning, now we consider the help of volunteers a very welcome support.

#### **Chair gymnastics: open meeting for older people.**

This learning offer started in October 2012. It was the result of observations made in other courses. Some learners had been members of yoga or Pilates classes for a long time and suddenly they stopped coming. When asked why, they said that they were no longer comfortable with standing or walking exercises. They were in fear of falling because their legs were weak and their gait no longer steady. They really regretted having to stop so we began to consider alternatives to classic yoga or relaxation classes that focus on movement.

*How does this learning group operate?*

The learning group operates on a voluntary basis; the teacher is a volunteer too. The participants are older people 70 ++; they are all restricted in their mobility by health problems. Some use walking aids. Changes we made included: using a room on the ground floor; selecting times to accommodate the learners; offering meetings that are not too long.

*What are people learning in the group?*

Participants learn how to stay active despite their mobility problems. The teacher focuses on remaining abilities and asks learners what suits them and what doesn't. The teacher learns from the participants as much as the other way round.

Exercises using music move the upper body and legs without putting weight on them and these are combined with relaxation and breathing exercises. Participants can choose the exercises they wish to undertake.

Learners share the need to retain as much mobility as possible and to enjoy social encounters, sharing joy and laughter.

## **Greece**

### **HAEA programme for older adults**

This educational programme for older people was conducted by the Hellenic Adult Education Association (HAEA) sponsored by Papastratos SA. The programme was designed and implemented to give to seniors living in less privileged areas the chance to take part in educational processes aimed at self-realization, personal development and expression. Additionally, to give them the chance to become involved in activities they always wanted to do, but never had the opportunity to do so in the past.

The target group was people over 60 years of age, men and women living in areas in the Thriassio Field, near the headquarters of the company "Papastratos SA" (Aspropyrgos, Elefsis and Mandra-Eidyllia). They typically have a low educational level (the majority at best have finished Primary school) and a low income level (unemployment is one of the most severe problems these Municipalities face, affecting the financial situation of the elderly). A total of 150 members from the Open Care Centres for the Elderly (KAPI) in these Municipalities took part in the program.

#### *Approaching the seniors*

The president of the Hellenic Adult Education Association and Scientific Director of the programme visited the Deputy Mayors in the three Municipalities, who were informed in detail of the contents of the programme and the sponsorship by the Papastratos Company; they agreed to collaborate with the HAEA in carrying out the Programme.

Following this, the Scientific Team from the HAEA visited the Open Care Centres for the Elderly (KAPI) that were to participate. The aim of these visits was to meet the seniors and inform them about the programme. An attempt was made during these meetings to set the grounds for a relationship of mutual trust and collaboration between the elderly and the members of the working group. Social Workers from the Open Care Centres who work with the elderly on an everyday basis helped the members of the HAEA to communicate with the seniors and establish such a relationship.

#### *Making learning attractive*

In order to make the programme appealing for the seniors and encourage them to take part, the Scientific Team described the programme and pointed out the positive outcomes of participating in such an educational process, which aimed at their personal development and satisfaction.

During this initial contact, the seniors expressed their need to acquire greater knowledge in order to face the demands of everyday life. At the same time they were reluctant, fearing that they were not potential learners, that it was too late for them to get involved in learning activities or that they wouldn't be able to cope due to health issues or to their low educational background.

However, after the members of the working group explained that the program would be tailored to their needs and abilities, they greeted the proposal with enthusiasm and great interest. Some even pointed out how important it was for them to know that someone cared about them.

#### *Ensuring enjoyable participation*

To ensure that the seniors could participate in the educational programme some important factors needed to be considered. First of all, the programme had to be interesting and appealing for participation. To achieve that, the topics of the lessons were chosen according to the participants' educational needs, which were identified through group interviews.

Another major issue was transportation and the distance of the lessons' location from the seniors' homes. For this reason the Open Day Care Centres (KAPI) located in their own neighbourhoods were considered to be the most convenient learning settings. Additionally the daily programme was formed according to the participants' preferences (at some KAPI the majority of the seniors preferred to have lessons in the mornings and at others in the evenings). Finally, when the participants had other group obligations (such as theatrical plays, attending church or even watching an important football game), the lessons were moved to another date.

An important issue to be addressed for the successful implementation of the programme was the capability of the trainers to deal with the special educational needs of the seniors. For this reason special care was given to the selection of the most competent trainers with considerable experience of adult education. After selection, a training the trainers session took place, in order to ensure that they would act according to the principles of active ageing.

#### ***THE SEELERNETZ group by 50plus Hellas***

This group is a self-organised learning group. It started within the EU SEELERNETZ Project and continues on a voluntary basis. The KAPI (Day Centre for Older People) and the Local University of Agia Paraskevi helped in informing their members of the SEELERNETZ EU-Project, the goal of which was to activate older people to form and participate in self-organised learning groups. The group decides the themes of learning and organises seminars or courses. The target group for the project were people 55+ socially disadvantaged in terms of education and learning. Since 2010, when the Project ended 4 groups have been formed (PC lessons, walking, health and event



organisation) and 2 of them (health and event organisation) continue their learning process today in a self-organised way.

Self-organisation was key; older people who participated decided for themselves what they wanted to learn and what would be of interest to them. There have been speeches on health issues, first aid courses, book presentations and discussions, psychology-seminars, alternative therapy-seminars.

The learning needs of these groups seem to be related to issues that deal with everyday life, such as health promotion, illness prevention, PC learning and exercise. These were also the most expressed learning wishes in a questionnaire distributed at the beginning in order to explore which issues are of interest to 55+ adults.

## **Poland**

### **Meeting with computers for GUT seniors, 2008-2012**

The first meetings with Gdansk University of Technology (GUT) retired staff took place in September 2008 in Czarlina summer camp. There were several informal meetings supported by the chairwoman of Gdansk University of Technology Seniors Club. In December 2008 the first formal meeting for seniors at GUT was organised and about 30 people took part. This meeting was dedicated to Lifelong Learning Grundtvig projects and training needs analysis. The first key message was “Let’s start to be active participants in ongoing Grundtvig Partnership projects: EuBiA, IMPROGE, Connecting +55”.

We started from enrolment on a basic computer course. The aim of this course was improving the seniors’ basic computer skills, starting from using a keyboard and mouse. The first training materials in a form of books were sent to us by the academy e-senior UPC (<http://www.upc.pl/o-upc/zaangazowanie-spoleczne/e-akademia-upc/akademia-e-seniora/>).

Since 2008, thanks to the support of the GUT Rector and the Dean of WETI (the Faculty of Electronics, Telecommunications and Informatics) meetings for seniors regularly take place in the computer laboratory of the Faculty of Electronics, Telecommunications and Informatics. PRO-MED, GUT staff, students and PhD students act as instructors.

In order to encourage older learners to take part in learning activities more than once a week we propose blended learning (Face to Face once a week and e-learning 24 hours/7 days a week). The LMS (Learning Management System) Moodle is used to support e-learning. All lessons are available in printed (A4) and in electronic format (pdf). We propose building the OER ([Open Educational Resources](#)) repository based on Creative Commons licence.

[http://en.wikipedia.org/wiki/Creative\\_Commons\\_licenses](http://en.wikipedia.org/wiki/Creative_Commons_licenses)



The learning provider should also consider how to build ties between participants. We celebrate together at Christmas, Easter, birthdays. We also organise informal meetings such as Nordic Walking, Petanque, [City Games](#) in the open space.

We suggest including diverse learning methods and supporting materials, offering courses/activities suitable to learning needs, involving intergenerational approaches in order to strengthen ties between generations.

### **Open lectures for Seniors, 2012**

Open lectures for seniors were organised in the Year of Active Ageing and Solidarity between Generations by the City Council and the University of Gdansk. The series of lectures was dedicated to health and safety.

The inaugural lecture was delivered by the Mayor of Gdansk, and the Rector of the University. The first lecture, entitled "The relationship between age and wisdom," was delivered in January, 2012 at the Faculty of Law and Administration at the University of Gdańsk. At the same time the inauguration of the City Guard project took place. Called "I know, I am familiar with, I act – Safety Senior", the project was conducted by the City Guard Prevention Unit.

Lectures were held once a month on Saturdays. The main themes were health education and security and legal issues and all were delivered by different presenters. The open lecture formula enables more participants to take part.

The events are documented at the photo sessions at <http://www.gdansk.pl/seniorzy,1519,20728.html>

## **Portugal**

### **Case study: The learning of the Spanish language into two Portuguese U3As**

(adapted from the research by Almeida, M.S.M (2012): "As universidades da terceira idade: novas aprendizagens ou centros de convívio", Faculdade de Ciências Sociais e Humanas, Universidade Nova de Lisboa, March) 12

This case is based on an empirical study aimed at determining the importance and impact of lifelong learning in the elderly and at explaining the function of a second language, in this case Spanish, as a tool to interact with other cultures.

Under a model of qualitative research, a questionnaire (with open questions) was given to a group of learners from both U3As involved (USILA13 and ULT14I) in the Lisbon area. The questionnaire contained: personal data such as age, gender, profession, training courses, marital status, number of children and people with whom they live, time of retirement, sports activities, means they use to be informed,

languages they speak or know, countries that have already visited, new technologies, purpose of attending a University of the Third Age, satisfaction within the University, family support, quality of life, belong to the Third Age. The survey was conducted between October 2011 and January 2012.

"Learning Spanish has many benefits, especially for me who likes to travel and also because I like to correspond with foreign friends I made in these trips. Moreover, learning anything is always an asset."

All the learners, both women and men, use new technologies for information, communication and study purposes. For some, the task of learning to work with IT programmes has not been easy but with some effort the learners have been able to achieve this goal.

All the learners stated that they have plans for the future and have goals to achieve. Reaching retirement is not the end of the road; just a short stop to review what was done and to decide the new route they would like to follow.

Concerning attendance at a U3A, responses reveal that 100% want to catch up on new trends and revisit prior learning. 38% of respondents seek contact with members of their own generation. 100% of subjects claim to feel good with people of their age because they have common life experiences.

The Third Age was seen by 43% of participants as a new stage of life to be lived. 5% think it is simply good. 21% are satisfied to be of the Third Age. But 9% feel scared and afraid that diseases might appear or imagine that may become disabled without autonomy. 21% feel depressed because of progressive physical deterioration which imposes some limitations.

All the learners affirmed that their quality of life was enhanced by attending the U3A, not only because of the learning but also due to the social contact with people of the same age. And their self-esteem improved considerably given the opportunity to prove that multiple mental abilities remain although physical abilities are no longer what they once were.

### **The pleasure of learning in later life in the first person** **Culture Institute of Portimão**

**Maria, 60 years old**, came for the first time this year to take classes in sports, English, geography, history and decorative arts. She could not be happier with her return to school. "My daughter suggested to me the senior university, but I thought to myself that having only the fourth class would be a bit tricky. But on the other hand, I always loved and had a great desire to learn, even attending courses during the years of work." She entered the senior university and found a new lease of life. "I am delighted. I am treated with affection so strong that I cannot miss a single class. This experience gave me more will to live." Her intention now is to learn as much as she can and give a hand to those in need; she still has time for social activities promoted by the university. "We dance, we sing, we walk. I'm really happy."

Her fellow learner , **Rosa, 58 years old**, retired at age 45 because of health problems. After a lifetime as immigrants in Switzerland, she spent her days at home. The university provided a real therapy. She tells us: "I feel much better, always eager for the arrival of the days of the classes. I was always very curious, always wanted to know more." She praises the patience and dedication of the teachers as well as the relationship between colleagues. "We exchange views, share knowledge, it is very enriching. I am a new Rosa, and all thanks to this experience."

**Teresa, 65 years old**, has lived in Portimão for two years after a lifetime spent in Lisbon working as a technical human resources employee in the civil service. The senior university was a breath of fresh air in her life. "When I retired I decided to come to Portimão, I got my daughter and my grandson. I bought a house, I'm adapting. I was used to that bustle of Lisbon and I decided to go to the university to occupy the free time I have." The **team of teachers** is composed of a group of professionals from different areas who voluntarily share their expertise with seniors. Some started as learners, but soon their knowledge made them move to the role of teacher. "I do not like to be called 'teacher', I am just someone who shares what they have had the opportunity to learn," says Mário, 63 years old, an English teacher. He arrived seven years ago after a career as a systems engineer. "When I came to the Algarve I began attending the university as a learner, and I used to help my colleagues with English until I was invited to teach the subject."

**Manuel, 64 years old**, arrived as a learner 12 years ago. Retired from banking, he became involved in the activities of the institute becoming part of the management. Today he is responsible for the activities at the university. "Here we fight isolation through the activities we organize."

(Testimonies adapted from an article published in the journal "Algarve Mais" and available online at:

[http://www.algarvemais.pt/index.php?option=com\\_content&view=article&id=809:o-prazer-de-aprender-na-terceira-idade](http://www.algarvemais.pt/index.php?option=com_content&view=article&id=809:o-prazer-de-aprender-na-terceira-idade)

## **Slovenia**

### **Simbioz@, e-literate Slovenia**

Simbioz@ is a unique volunteer Slovenian project started in the year 2011 by Institute Ypsilon and developed into an on-going yearly activity . The aim of the project is to use intergenerational solidarity as a basis of improving the computer literacy of older people in Slovenia, to promote exchange and encourage lifelong learning. Slovene statistical data show that 90% of people aged over 65 years have never used a computer or internet, which is below the average in EU. The project engaged more than 200.000 young people and more than 300.000 older people.

Young volunteers and older people eager to learn how to handle a computer in today's world of new technology met on organized free workshops in libraries, schools, homes for older people all over Slovenia.

The younger people share their knowledge and learn about importance of intergenerational solidarity and the older people learn way of new communication by using a computer. The key points of the project are: making the use of computer a positive learning experience for the older people; building their self-confidence and motivating them to learn and use internet; promoting lifelong learning as a way of improving quality of life. In the year 2012 8.283 participants participated in 300 locations: 3.250 volunteers taught 5.033 people, of them 67% were women. The average age of the older participants was 64 years and of the younger, 23. The oldest was 93 and the youngest participant only 10 years old. 93.1% of people were generally satisfied with the training.

*Who helped to make contact with these older adults?*

Contact was made through media, such as radio and television. A strong commercial campaign and advertising in newspapers, where the target population are older people, were used. Partners in the project such as different associations were also crucial as they acted as a link and connection with the target group. Printed media was also used (flyers), a phone line was opened and also a Simbioz@ info point.

*What key messages were necessary to make learning attractive to these older adults?*

The key point in attracting the participants was the use of local coordinators. These were active local people who know their neighbourhood very well, have a good social network, are members of clubs, associations and are generally recognized in their neighbourhood. A key role was also played by the ambassadors appointed by Simbioza: actors, singers, TV and radio hosts and sponsors such as the president of the Republic of Slovenia, president of National council and parliament ... who outlined the benefits of participating: social responsibility of younger people and social inclusion of older people.

*What changes had to be made by the learning provider to ensure that these older adults could participate in group learning?*

To ensure such massive participation a lot of coordination had to be done in order to provide sufficient numbers of young volunteers, equipment and suitable locations, such as libraries, homes for older people, schools etc. Numbers of available computers, depending on the location, were limited, but normally one computer per person was provided. Two hours in the morning and two hours in the afternoon for five days of the week were offered to be convenient for all the participants. It had to be ensured that also younger could participate without missing out on classes.

*What plans were put in place to make attending group learning acceptable and enjoyable?*

Locations were chosen by the number of interested individuals, based on their application and in relation with the possibilities of the city/town: is there a suitable, adequate place for group learning, with sufficient technical support, suitable lighting, is it accessible for people with disabilities etc.? All these aspects were taken in consideration.

### **ZDUS' self-help group**

ZDUS offices are housed in an apartment block where approximately 40 older, retired people live on their own. There are more, older women than men and mostly they have low pensions, a low level of formal education and few/poor social contacts. For some years ZDUS passively observed this situation and in the year 2012 took the initiative to unite residents in a self-help group. 30 residents attended the first meeting. Group discussion revealed poor communication amongst the residents which became one of the main activities for the group to focus on, learning how to improve their communication skills, personal relationships and contribute to a better quality of communal living.

#### *How does this learning group operate?*

The "learning" group has its sessions once per week. Arrangements and few changes have been made when it comes to the time of the sessions, since the residents wanted to participate after they finished their daily routine activities, such as preparing lunch. The location is very favourable for the participants, since it's on the ground floor of their own building and familiar to them, so they don't need to go far, as some are disabled or need support to walk. For the time being the frequency of the meetings will be once a week. Later if the group expresses the desire, more frequent sessions will be arranged. The two group leaders are both employed at ZDUS, and coordinators of ZDUS' volunteer social programme: Older people for better living quality in their homes.

### **Switzerland**

#### **Senior guides (Zurich) – informal learning in later life**

Elaborating and testing an innovative method of informal learning in later life:

<http://www.senior-guides.eu/>

#### **Ellä (Zurich) – learning for seniors in in-patient clinics.**

The strategic aim of ELLA is the development of a new access to "lifelong learning" for the elderly in in-patient clinics.

[http://www.projekt-ella.eu/cms/front\\_content.php?idcat=73](http://www.projekt-ella.eu/cms/front_content.php?idcat=73)

## United Kingdom

**Open Age UK** <http://www.openage.org.uk>

Open Age established in 1993, is a user led charity working across Kensington, Chelsea and Westminster enabling older people, from 50 to over 100 years of age, to sustain their physical and mental fitness, maintain active lifestyles and develop new and stimulating interests. Open Age reaches all communities in these London boroughs working very effectively in all minority ethnic groups and care settings. The programmes are created through surveys of need, availability of resources (tapping into the local community – hence the work with the Chelsea FC Foundation. There are 200 weekly activities in over 50 community venues The activities include a wide range of physical activities, dance, creative and performing arts, IT, languages, current affairs social groups with speakers, weekly trips, tea dances and health and taster days. Activities are provided from around 50 different sites that include our own centres as well as church halls, community centres, libraries, sheltered housing schemes and sports centres. They even provide facilitated groups over the phone for free for those who cannot get out.

Some activities are especially targeted at carers to give them time for themselves. There are regular trips and social/cultural events as well as complementary therapy sessions.

The classes are normally run by independent professional tutors with the qualifications and experience in the area of activity taught. Social and information groups are facilitated by our outreach staff or volunteers who bring in appropriate speakers to deliver topics of interest. Open Age is further linked into a huge number of informal partnerships and work with a large number of arts and cultural organisations to spread the breadth of what we offer for example we are an ambassador to the Historic Royal Palaces.

Some of the key factors behind Open Age are that: -

- It is community led with older people involved in the decision making
- It operates in locations easily and safely accessible to older people
- The activities are very varied and respond to need
- word of mouth effectiveness in reaching older people
- the learning activities are projected as 'fun'

Its possible weaknesses are: -

- The lack of regular secured income
- Little evidence through research of the benefits – changes in attitudes, progression into other activities, more formal learning, from isolation to group activity.

Pepper Pot <http://www.pepperpotdaycentre.co.uk/about-us>

Whilst primarily a day care centre for African Caribbean elders in Kensington and Chelsea Pepper Pot also runs a range of activities – many of which are ‘educational’ in nature. These activities include: Regular day outings around London, Annual Trip abroad, Exchange visits with other Day Centres, Music and Dance Therapy, Summer and Christmas parties, Dominoes and Bingo, Pool Table and other games, Bible Classes and Gospel Singing, Reminiscence and Discussion, Arts and Crafts, Computer Use, Tai Chi exercise classes. The starting points are being older from a particular ethnic group, then providing activities appropriate to those needs as stated (and previously researched) of those elders. The activities whilst showing the cultural origins do indicate attempts to ‘branch out’. In 2010 Pepper Pot Centre aimed to broaden its membership base by encouraging members of other ethnic minority groups in addition to African and Caribbean people to access services they offered. (No evidence on website that this has happened – but I don’t doubt that it has).

## 5. MATURE training

MATURE partners have a rich variety of resources upon which to draw to develop their training programme. The structure of the programme and the project’s proposed products highlight aspects that MATURE partners know are sticking points in reaching the hard to reach:

- *Initial engagement with non-participants*: how does that happen? Who can help it to happen? What form does this engagement take? What are its outcomes?
- *Involving people in learning*: how do people ‘own’ learning? Who else has a stake in learning? How do they have their say? Who manages differing perspectives? How does that happen?
- *Motivation to learn and motivation to continue learning*: what stimulates learning? How can learning be configured to sustain interest and commitment? What are the roles and responsibilities within a learning situation?
- *Relevant and applicable content*: what should be learnt and taught? How do you learn to learn? How is content best derived? What methodologies work best? How does teaching inspire learning and make it happen effectively? What resources support learning?
- *Progress and progression*: what constitutes positive outcomes from learning? Who makes those judgements and how are they made? What opportunities arise from successful learning for learners; for teachers; for stakeholders; for non-learners?



### **5.1 Training teachers – competences.**

As well as benefiting from the previous experience and work within the team, MATURE partners will develop their ideas, courses and resources within the context of key European policy and practice relating to teacher training and lifelong learning.

The document 'Key Competences for adult learning professionals' states that:

'Competences should be understood as a complex combination of knowledge, skills and abilities/attitudes needed to carry out a specific activity, leading to results. Knowledge should be understood as a body of facts, concepts, ideas, principles, theories and practices related to a field of practice, work or study. Skills should be understood as a capacity learned or acquired through training in order to perform actions by applying knowledge. Abilities/attitudes should be understood as the physical, mental or emotional capacity to perform a task.'

Key competences for adult learning professionals:

<http://ec.europa.eu/education/more-information/doc/2010/keycomp.pdf>

The knowledge base for MATURE training will include:

- understanding of the ageing process, its advantages and disadvantages;
- recognition of the links between learning and ageing;
- comprehension of later life issues;
- familiarity with factors that impact on engagement, participation and active longevity;
- awareness of the interrelatedness of learning and other social agendas influencing and informing the lives of older people;
- acquaintance with theories of teaching and learning applicable to older adults.

MATURE skills will embrace:

- competence in the development and delivery of engagement strategies that reach out to non-participant older adults;
- the ability to create programmes of learning that are responsive to the needs of ageing and older adults;
- the aptitude to deliver learning that motivates, inspires and draws commitment from older people;
- the talent to configure learning that is relevant and applicable to life skills;
- the flexibility to accommodate the needs of older adults within existing programmes of learning and within multi-generational learning groups.



MATURE abilities and attitudes include:

- empathy with older people;
- powers of engagement with a wide variety of individuals and organisations in the pursuit of relevant learning for older people;
- open-mindedness to new ideas; to challenging concepts and situations;
- willingness to embrace innovation; think 'out-of-the box'; challenge pre-conceptions;
- commitment to encourage progression from learning.

In focussing its teacher training on meeting the needs of older people, MATURE works within the spirit of the recommendations of the European Association for Education and Ageing:

EAEA recommends that adult education providers might:

- look at the barriers to learning opportunities for older learners
- develop outreach activities for older people and partnerships, including the (potential) learners themselves
- listen to, involve and facilitate older learners' voices when planning, designing, offering and evaluating learning processes of adult education
- value the wisdom of older people and draw upon during the learning process
- create a learning environment that is safe and supportive, confidence is nurtured, praise and encouragement given and a group learning approach is taken
- design appropriate learning offers, which are accessible in terms of venue, cost, timing and duration as well as relevant to their day-to-day lives.
- provide clear, concise and understandable information, guidance and counselling services for older learners
- recognize different experiences of people, different learning styles and the different levels and types of progress in learning process.
- consider a mixture of targeted learning groups, both heterogeneous and homogenous groups
- improve, adapt and widen informal adult learning for older people in care settings
- invest in the competences and skills of trainers working with older adults
- raise the awareness and positive attitude of adult educators for working with older learners.'

EAEA: Active ageing through adult learning:

[http://www.eaea.org/doc/eaea/2012\\_Recommendations\\_Active-ageing-through-Adult-Learning.pdf](http://www.eaea.org/doc/eaea/2012_Recommendations_Active-ageing-through-Adult-Learning.pdf)

MATURE training development will draw inspiration from the experiences and outcomes of other European projects that focus on learning in later life seeking out such projects featured in compendia compiled by EACEA.

([http://eacea.ec.europa.eu/llp/results\\_projects/project\\_compendia\\_en.php](http://eacea.ec.europa.eu/llp/results_projects/project_compendia_en.php)) and or by making working links with other European networks such as ForAge (<http://www.foragenetwork.eu/en/>):

From the 2012 compendium it is possible to identify projects with potential synergies with MATURE such as:

- Developing Validation of Adult Education Trainers 526330-LLP-1-2012-1-IT-GRUNDTVIG-GMP
- KIM -Key Competencies for Migrant , Promote Social Inclusion and Gender Equality 526292-LLP-1-2012-1-IT-GRUNDTVIG-GMP
- Active Ageing Learning Community 526384-LLP-1-2012-1-BG-GRUNDTVIG-GMP
- Together Old and Young: young children and senior citizens learning and developing in intergenerational community spaces 526706-LLP-1-2012-1-NL-GRUNDTVIG-GMP
- Take Care Project: Healthcare Language Guide for Migrants 526736-LLP-1-2012-1-NL-GRUNDTVIG-GMP
- Make it Work - Meaningful work and (re)integration programmes for marginalised and vulnerable groups 527251-LLP-1-2012-1-NL-GRUNDTVIG-GMP
- Directing Life Change 527315-LLP-1-2012-1-UK-GRUNDTVIG-GMP
- Key competences: Validating Adult Learners' educational Experiences 527436-LLP-1-2012-1-IT-GRUNDTVIG-GMP
- Sharing European Memories BETWEEN generations 527479-LLP-1-2012-1-IT-GRUNDTVIG-GMP
- MENTA50+. Learning to take actions for mental fitness and wellbeing in older age 527515-LLP-1-2012-1-ES-GRUNDTVIG-GMP
- Developing an European SOFTWARE to VALIDATE and RECOGNIZE the KEY NON FORMAL & INFORMAL Competences needed by the SENIORS who are VOLUNTEERS in Social & Educational Activities 527711-LLP-1-2012-1-ES-GRUNDTVIG-GMP
- SENIOR PASS 527846-LLP-1-2012-1-FR-GRUNDTVIG-GMP
- The New Knowledge For Pre-Retirement Training Quality 527863-LLP-1-2012-1-LT-GRUNDTVIG-GMP
- Visually Impaired Seniors Active Learning 527915-LLP-1-2012-1-FR-GRUNDTVIG-GMP
- Generations in Action - The Role of Intergenerational Learning for Active Ageing (GoAct) 527114-LLP-1-2012-1-DE-GRUNDTVIG-GAM

## ***5.2 Training teachers - educational theory - andragogy and geragogy***

The development of MATURE's training takes place within the broad principles of andragogy and geragogy.

Andragogy as defined by Malcolm Knowles in the 1950s is the 'art and science of helping adults learn'. Its key assumptions are: the need to know; learner self-concept; the role of learners' experience; readiness to learn and orientation to learning. Andragogy promotes practices such as facilitation and experience based learning that enable adults to be or to become self-directing in their actions.

Geragogy emphasizes the guided learning of older adults and considers their special needs. (Battersby & Glendenning 1992:120) promote a vision of geragogy that:

'...conceptualises teaching and learning as a collective and negotiated enterprise, as well as assuming a liberating and transforming notion which endorses principles of collectivity and dialogue as central to learning and teaching.'

Geragogy '...provides older persons with opportunities for a self-conscious critique of their life and experiences ...that promote critical reflection and action.'

In 'Lifelong Learning in Later Life' (Findsen, Brian; Formosa, Marvin. 2011) the authors contest that:

'...one should not expect from geragogy some comprehensive educational theory for older adult learners, but only an awareness of and sensitivity to gerontological issues that surely will aid facilitators of older adult learners to plan and execute more efficient learning experiences.'

Consideration of the principles of geragogy leads to models of peer teaching, reflection about relevant curricula and about the look of learning for older adults.

Predecessor projects have led MATURE partners instinctively towards the application of the key principles of andragogy and geragogy. Within the development of outcomes and in work with participants, project teams have made use of practices associated with both theories. Partners have not, however, adopted theory-driven approaches to products; pragmatism, experience and commitment to what works have been prime instigators of project practice. Partners have used their individual and collective experience as principal sources for the development and delivery of project material. MATURE will continue to place practice and experience at the heart of training development using the know-how within the team and its networks.

### ***5.3 Teacher competences - engaging the hard to reach***

One of the MATURE project's themes is the pursuit of older adults who have proved 'hard-to-reach' - the non-participants in learning. In focussing on specific areas of disadvantage that may be contributory barriers to engagement, the team wishes to explore and disseminate the mechanisms and processes that make contact and enlistment of new learners a reality.

Widening participation in learning is a key European aspiration and enabling access for those least likely to participate is a consistent feature among projects in the compendia quoted above

[http://eacea.ec.europa.eu/llp/results\\_projects/project\\_compendia\\_en.php](http://eacea.ec.europa.eu/llp/results_projects/project_compendia_en.php)).

INCLUSION is a European thematic network reviewing how people with fewer opportunities participate in lifelong learning programmes

(<http://www.llpinclusion.eu/default.asp>).

The co-option into learning of people who do not engage has been a continuing challenge for adult education practitioners at national level.

The MATURE project sets out to tackle non-participation among older adults from two perspectives:

- The consideration of the role that intermediary organisations might play in the initial contact, signposting and entry into learning of older people.
- The responsibilities of the teacher in the creation and delivery of learning and learning contexts that ensure access and progress for all learners.

The networking that has been a feature of MATURE's predecessor partners has convinced the team of the potential of intermediary organisations to build bridges between older adults and learning provision. Moreover, the experience of experts from different fields of engagement with seniors has its part to play in the development of relevant learning.

It is important for teachers to understand the place of collaboration in the development of learning. It follows that they need to know who key partners might be and how to engage with them. This joined-up approach is not common practice; MATURE products will help both intermediary organisations and teachers to enhance their understanding of each other, of learning, of its potential for older adults and of their respective roles in its development and delivery.

#### **5.4 Training teachers – learner competences**

MATURE's perspective on later life learning needs will be informed by a number of sources including:

- Key competences for lifelong learning as defined in the 2006 European Framework of Reference:

'.....a combination of knowledge, skills and attitudes appropriate to the context. Key competences are those which all individuals need for personal fulfilment and development, active citizenship, social inclusion and employment.'

European key competences for lifelong learning

[http://ec.europa.eu/dgs/education\\_culture/publ/pdf/ll-learning/keycomp\\_en.pdf](http://ec.europa.eu/dgs/education_culture/publ/pdf/ll-learning/keycomp_en.pdf)

The Reference Framework sets out eight key competences:

- 1) Communication in the mother tongue;
- 2) Communication in foreign languages;
- 3) Mathematical competence and basic competences in science and technology;
- 4) Digital competence;
- 5) Learning to learn;
- 6) Social and civic competences;
- 7) Sense of initiative and entrepreneurship;
- 8) Cultural awareness and expression.

The first two competences in this list have specific bearing on the work of the MATURE team who will wish to consider the potential correlation between communication and non-engagement with learning.

‘...millions of adults across Europe lack the necessary literacy skills to function fully and independently in society.’

[http://ec.europa.eu/education/literacy/what-eu/high-level-group/documents/literacy-final-report\\_en.pdf](http://ec.europa.eu/education/literacy/what-eu/high-level-group/documents/literacy-final-report_en.pdf)

Poor mother tongue literacy and deficient host country language skills are particularly isolating for older adults. Inability to communicate effectively, the stigma attached to low or no literacy, lack of cultural insight and understanding are significant barriers not only to learning but to a host of other actions that typify active ageing.

Whilst acknowledging and embracing the basic literacies of the framework, MATURE partners take the view that ageing and later life generate the need for additional sets of competences and crucially for the ability to apply skills, knowledge and understanding across a range of contexts.

- The **LARA** project ([www.laraproject.net](http://www.laraproject.net)), referred to above, began a process of defining and working with literacies for ageing. These included: financial literacy; emotional literacy; health literacy; civic and community literacy; technological literacy. At the centre of LARA’s literacy paradigm is ‘learning literacy’ – a set of competences that define the ability to learn and that underpin success in achieving the other literacies.

The need to look at learning in a different way in order to match it with individual and target group need is a critical professional skill for teachers of adults. MATURE training programmes will use LARA’s findings to help trainees to model alternatives for course and session content.

## 5.5 Training teachers – methods

MATURE partners come to the project well versed and practised in various methods of engagement and learning delivery from previous work. Fundamental to MATURE is the notion that learning is a negotiated activity from inception to end.

The LISA, LENA and EuBia projects taught us key facts about initial engagement to motivate participation:

- that it involves networking within communities and across locations;
- that the start of a learning journey may involve many more people than the individual for whom that journey is conceived;
- that the engagement of non-learners is an ongoing activity until the moment that commitment is achieved;
- that initial engagement practices may continue simultaneously with teaching in order sustain motivation.

The LENA project contained a particularly good illustration of the steps involved in reaching out to a non-participant community. In its ‘Sharing across communities’ project, VHS Hamburg worked extensively with local Turkish religious and community leaders to reach, engage, develop and deliver appropriate learning for a group of isolated older Turkish women learning together with their German counterparts. (<http://www.bia-net.org/images/stories/lena/pdf/lena-handbook-en.pdf>)

Once stimulated to join a learning group negotiation remains a key methodological approach. LENA project pilot courses demonstrated that involving older people in the creation of courses and sessions through focus group and individual work was an effective way of overcoming barriers to participation. In influencing the way in which learning was conceived and delivered, participants began to feel a sense of responsibility and ownership increasing motivation to ‘stay the course’. What was learned made more sense and was both more enjoyable and more relevant.

These democratic processes of engagement and motivation have an impact on behaviours within learning groups. The LARA project ([www.laraproject.net](http://www.laraproject.net).) looked closely at classroom practice and the roles of participants, highlighting methods that were most likely to generate learning that was responsive to ageing:

- emphasis on facilitation not teaching
- promotion of experiential learning
- strategies in place that enable learners to be active participants
- deployment of significant differentiation tactics

## **5.6 Teacher training - outcomes from learning**

MATURE's training is designed to generate outcomes from learning that impact positively on the lives of older adults. Previous work has led to the following conclusions:

- Formal measurement gives rise to quantifiable data but does not do justice to the breadth of learning that has taken place.
- Learning provision tends to be subject driven; the measurement of outcomes relates to the skills and knowledge acquired of that subject.
- The measurement of progress is liable to take place within linear criteria but progress in learning is not linear.
- Progression is too frequently viewed as movement to a higher level of activity or to a prescribed outcome (work; volunteering etc.).
- For older adults 'progression' may be many things: a change for the better in daily life; a side step to linked or additional skills and knowledge; the application of what has been learned for the benefit of the self or others (family; community; friends).
- In common with the majority of adults, older people illustrate that the outcomes of learning manifest themselves at any number of points in time and rarely as an immediate consequence of a learning experience.
- The maintenance and demonstration of the balance between the celebration of subject skills and of other outcomes of learning (increased well-being; confidence; self-esteem) is particularly important for older adults.

The European perspective on measuring learning is to be found in: European Commission Council recommendation 2012

[http://ec.europa.eu/education/lifelong-learning-policy/doc/informal/proposal2012\\_en.pdf](http://ec.europa.eu/education/lifelong-learning-policy/doc/informal/proposal2012_en.pdf)

Member states should:

'Ensure that the national system of validation of non-formal and informal learning includes the following elements:

- Support to citizens in the identification of their learning outcomes acquired through non-formal and informal learning;
- Assistance to citizens in documenting their learning outcomes acquired through non-formal and informal learning;
- Assessment of an individual's learning outcomes acquired through non-formal and informal learning;
- Certification of the results of the assessment of learning outcomes acquired through non-formal and informal learning in the form of a qualification, as credits leading to a qualification or as otherwise appropriate.

It should be ensured that every citizen can take advantage of any of the aforementioned opportunities separately or in combination, according to their needs.'

In the European Qualifications Framework Note 4, reservations about the measurement of learning using a learning outcomes approach are raised:

‘The most serious argument is that learning outcomes cannot possibly describe all the learning that is achieved during a learning programme. Learning outcomes can reduce a professionally constructed, flexible and sensitive (to individuals and other needs) learning experience to a series of statements.’

‘While the strength of using learning outcomes to describe a qualification is that they specify a standard for what should (as a minimum) be achieved as a result of learning, the weakness may be that this approach is not geared towards the development of explorative and experimental teaching and training programmes that attempt to produce very diverse learning according to the diversity of learners.’

[http://ec.europa.eu/education/lifelong-learning-policy/doc/eqf/note4\\_en.pdf](http://ec.europa.eu/education/lifelong-learning-policy/doc/eqf/note4_en.pdf)

A number of national agencies have set out to evidence what learning can really achieve. In the UK NIACE (the National Institute of Adult Continuing Education) proposes a number of tools on its website:

<http://www.niacedc.org.uk/tools-assessing-and-evidencing-achievement-and-progress> that deliberately focus on capturing evidence of ‘soft outcomes’.

In 2009 Professor John Field’s thematic paper for the Inquiry into the Future for Lifelong Learning in the UK looked closely at well-being and learning.

(<http://www.niace.org.uk/lifelonglearninginquiry/docs/IFLL-wellbeing.pdf>)

MATURE’s teacher training programme will include consideration of the measurement of progress and the capture of progression. Partners will wish to address the collection of evidence that illustrates the real benefits accrued from learning in a manner that makes sense to the older learner.

## **Conclusion**

This draft report has been prepared by MATURE UK partners, with contributions from all other partners, in January 2013 in preparation for the first transnational meeting in February 2013. At this meeting, the project team will use the report as a basis for discussion that will lead to the drafting of the structure of MATURE’s training programme and indicative content for individual training modules.

This report will be redrafted, amended and additions made as indicated by the MATURE team and will be uploaded to the MATURE website <http://matureproject.eu> by the end of June 2013. ]